

EuroMatters



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COVER PHOTO

DAW KHINE KHINE NWE by 10A

MESSAGE FROM EUROCHAM

Greetings from **EuroMatters!** Our business magazine for executives and investors in Myanmar is proud to present its sixth edition with a brand-new section focusing on hospitality, *Inspiring Myanmar*. This section will present unique places across Myanmar that will allow you to further discover the country and explore all the diversity and richness of its culture.

This edition focuses on the main challenges the agrobusiness sector is facing in the country. Food safety is a central issue that aims to provide consumers with safe and affordable food products in Myanmar. The Good Agricultural Practices (GAP) are another topic of discussion in this edition, as EuroCham Myanmar's Agrobusiness Advocacy Group is promoting its adoption as a useful mechanism for aligning local production with international standards.

The edition features as a cover, an exclusive interview with DAW KHINE KHINE NWE, a charismatic business leader who shares her vision on the private development sector with specific inputs on the garment landscape in Myanmar.

We wish you an insightful reading. •



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NOVITIATION: JOYFUL TIME

THIS IS an amazing scene where the grandmothers are glad to see their kids joining the monastery while they are carrying on their heads the donations to the monastery like mats, pillows and blankets.

You can feel the excitement of this celebration since they are dancing the traditional dance and they are dressed as the best they could. This usually happens after the major school examination around February or March. •

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Bagan is now a UNESCO World Heritage Site

BAGAN WAS crowned a World Heritage Site earlier this year, an award set to boost Myanmar's nascent but fast-developing tourism market.

This is the country's second entry to the list after World Heritage Status was granted to the ancient Pyu cities of Sri Ksetra, Halin and Beikthano in 2014. The proposal to list Bagan was approved by the UNESCO World Heritage Committee at a meeting in Baku, Azerbaijan, in July.

"Bagan is a sacred landscape that features an exceptional array of Buddhist art and architecture, demonstrating centuries of cultural tradition of Theravada Buddhist practices of merit-making, providing dramatic evidence of the Bagan Period from the 11th to 13th centuries. The serial property of eight components is located in the central dry zone of Myanmar, consisting of 3595 recorded monuments," UNESCO announced in a press statement.

Tour operators are hopeful that the recognition by the UN's cultural body is good news for the hospitality industry. However, meeting conservation promises and effective local governance will be crucial for the site's tourism business to thrive sustainably.

According to boutique tour operator Myanmar Shalom, UNESCO's recognition has the potential to energise Myanmar's

tourism and hospitality sector. Bagan will continue to draw visitors with UNESCO status, but it is important that the majesty of the site is preserved and effectively managed.

"Bagan holds an immense historical significance and it's the heart of Myanmar. We must all join hands and endeavour to make Bagan a city of pride for now and all future generations. There are improvements that could be carried out and stable conservation and preservation strategies to be put in place.

"There is no secret that the initial restoration of Bagan was criticised as poor. There is a need for proper conservation," said SAMMY SAMUELS, Executive Committee Member of Myanmar Tourism Marketing and Managing Director of Myanmar Shalom Travels. "We need to make sure that mistakes of the past are not repeated and more responsibility to preserve the recognition."

Visitors need to be made better aware of preserving monuments and respecting tourist guidelines, Myanmar

Tourism Entrepreneurs Association chair U NAUNG NAUNG HAN told the govt paper Global New Light of Myanmar. "We have found that some visitors are destroying frescos. Some are writing their arrival dates and names with correction pens on pagoda walls. Some tourists have even climbed up to restricted areas. So, foreign as well as local tour companies need to control them. We need to conduct awareness training for them."

The Department of Archaeology, National Museum, and the Ministry of Religious Affairs and Culture have prohibited talking loudly, touching frescos in ancient buildings, taking photos and videos in ancient buildings with frescos or beside Buddhist images.

There is now a community group leading the "Bagan Plastic Campaign", raising awareness about the issue of waste pollution. The problem is not unique to the site but prevalent across the country.

The Myanmar government has pledged to remove all hotels from the existing archaeological sites to a dedicated hotel zone by 2028.

Myanmar has decided to grant visa-on-arrival for citizens from Spain, Italy, Germany, Russia, Austria and Switzerland, and the arrangement will commence this month. The country has given tourists from Japan, South Korea, Hong Kong and Macau visa exemptions since last year.



Myanmar Investment Commission announces changes to proposal documents



THE MINISTRY of Investment and Foreign Economic Relations (MIFER) announced in July a series of changes to the proposal form (Form 2) and endorsement application forms to the Myanmar Investment Commission (MIC) at the Union level (Form 4-a) and regional and state investment commissions (Form 4-b) across the country.

The updated forms would entail effective and streamlined evaluations for business proposals, said NISHANT CHOUDHARY from DFDL, co-chair of EuroCham's legal group. MIFER has slightly increased the level of details in the MIC permit/ endorsement application form under the new format.

Starting from August 1, the MIC permit /endorsement application would need to provide information on (i) Parent Company's Capital Contribution; (ii) Parent Company's Technical Experiences; and (iii) Proposed investment's supply chain and whether there are benefits to the other related businesses, among others.

"This ensures that all the information is presented to the MIC at the onset and the investors do not have to wait until the 'Proposal Meetings' to show the

MIC what they bring to the table," MR CHOUDHARY explained.

The updated format gives investors, he added, at the very onset a platform to showcase their company profile and how being established in Myanmar would benefit Myanmar's economy. Additionally, upon providing the information as requested for in the updated application forms, the MIC and relevant ministries also get a preliminary objective insight on the proposed investment so they can evaluate efficiently.

The updates will allow the ministry to scrutinise business proposals more effectively and with more information, the official notification stated. The changes were announced after local English-language paper The Myanmar Times published an investigative story detailing alleged transparency failures under the investment approval body and revealing how multiple disclosure requirements for both the MIC and investors were not enforced.

The new Myanmar Investment Law states that investments exceeding US\$5 million require approval from the Union MIC, while those involving less investments only need to go through regional or state commissions.

The Union-level Myanmar Investment Commission is chaired by MIFER minister U THAUNG TUN. Since he took office, the new MIC chair has been actively promoting Myanmar as a responsible investment destination at different business forums and events overseas.

Two months ago, he pitched Myanmar to a Thai business audience in Bangkok.

"In August last year, our new Companies Law came into effect - permitting investments in domestic companies of up to 35%. This new law opened up our stock exchange to foreign participation - providing more streamlined business regulations, making it easier than ever to launch and operate new businesses.

"We also launched our new, online company registration portal we call 'MyCO' - making the company registration process fast and efficient. I am pleased to announce that in the last month alone, DICA saw 1428 new companies register successfully - 100 percent of which opted to register online via MyCO," U THAUNG TUN remarked.

“Respecting Myanmar Culture in the Workplace” multilingual guide launched by govt, MCRB

THE DIRECTORATE of Investment and Company Administration (DICA) and the Myanmar Centre for Responsible Business (MCRB) have launched a multi-lingual guide to “Respecting Myanmar Culture in the Workplace”.

The guide aims to help foreigners understand Myanmar culture and avoid cross-cultural misunderstanding in the workplace and with local communities. It was developed by the MCRB, in partnership with DICA - which is under the Ministry of Investment and Foreign Economic Relations (MIFER) - and with input from other ministries.

With illustrations by prominent Myanmar cartoonist AW PI KYEH, and covering topics such as dress code, eating and drinking, greetings and body language, the guide shines light on the importance of listening to and learning from local people, to help prevent conflict and contribute to commercial success.

While the publication primarily focuses on building mutual respect and understanding, rather than legal requirements, it makes clear that investors should ensure that they are familiar with Myanmar workplace laws, including those concerning labour, health and safety and environmental protection.

MIFER Minister U THAUNG TUN said: “Responsible investment is respectful investment. Workplaces which are respectful and inclusive are invariably more productive, and with lower turnover of the workforce. Respect for diverse cultures and traditions will undoubtedly contribute to the wider goals of our government, including sustainable peace.”

For MCRB director VICKY BOWMAN, minor cultural misunderstandings by foreign company employees can escalate into wider grievances – including with local communities – which can ultimately jeopardise investments. They can also contribute to less motivated and less productive workplaces.

Through gathering inputs from focus groups and interviews with various stakeholders – including government bodies, the private sector, NGOs, communities, and employees with experience of foreign workers – the guide seeks to provide a broad understanding of the main Myanmar cultural norms, while also recognising Myanmar as a country with diverse ethnic cultures, languages and religions.

In particular, it highlights that investors and their employees need to understand local culture in remote locations so as not to cause offence.

“Respect for Myanmar’s many cultures is an important part of promoting equality, combatting discrimination and creating a respectful workplace,” observed MS BOWMAN.

Although this guidebook is primarily targeted at foreign managers, to help them respect and comply with the customs, traditions and traditional culture of the ethnic groups in the Union, the messages in it are important for all, added U THAUNG TUN.

The Respecting Myanmar Culture in the Workplace guide is available online at www.dica.gov.mm, www.mcrb.org.mm in English, Myanmar and Chinese languages. Hard copies of the Chinese language version have been sponsored by the EU’s SMART programme which supports responsible investment in the garment sector, much of which is Chinese-owned. Japanese, Korean and Thai editions are planned.

Organisations can contact MCRB to obtain a soft copy of the booklet for re-printing for staff and visitors, or to include the material and cartoons in their own training programmes on respectful workplaces and cross-cultural sensitivity. Like all MCRB publications, this is available for reproduction free of charge, but should be duly credited.

The MCRB is a Yangon-based NGO funded by the UK, Denmark, Norway, Switzerland, the Netherlands and Ireland, based on collaboration between the Britain-based Institute for Human Rights and Business, and the Danish Institute for Human Rights. The organisation was established in 2013 to provide an effective and legitimate platform for the creation of knowledge, capacity and dialogue concerning responsible business in Myanmar, based on local needs and international standards, which results in more responsible business practices. •



Myanmar forms anti-illicit trade group, led by Vice President U Myint Swe

THE ILLEGAL Trade Eradication Steering Committee, led by Myanmar Vice President U MYINT SWE and formed in June this year, is now up and running.

Illegal trade volumes in Myanmar during fiscal year 2017-18 amounted to US\$6.4 billion, according to EuroCham Myanmar survey.

Exports statistics showed Myanmar had a trade volume of \$25.1 billion, but EuroCham revealed the actual export volume amounted to just \$18.7 billion. This already accounts for illegal volumes of beer, whiskey, cigarettes, medicines, electronics, cosmetics and other consumer goods.

The country has suffered a loss of tax revenue of about \$364 million from these illicit products.

Vice President U MYINT SWE, as the Illegal Trade Eradication Steering Committee chair, attended and addressed a first coordination meeting of Illegal Trade Eradication Steering Committee held at Ministry of Commerce meeting hall in Naypyitaw in September.

The President’s Office formed the 39-member Illegal Trade Eradication Steering Committee in June 2019 and assigned 13 tasks, with the Ministry of Commerce responsible for the implementation.

The committee was formed with the aim of increasing cooperation between union level departments on the matter of rising global illicit trade environment index due to illegal trade.

At this meeting, the members discussed how to have effective sector-wide implementation of the 13 assigned tasks. The steering committee was to setup and establish policy, strategies, tactics, programmes, short and long-term work processes.



In 2018, the Transnational Alliance to Combat Illicit Trade (TRACIT) commissioned the Economist Intelligence Unit to produce the Global Illicit Trade Environment Index as a tool to measure the extent to which countries enable or inhibit illicit trade.

Last year’s findings from the Index underscore the challenge that Myanmar faces in combating illicit trade. Myanmar ranks 82nd out of 84 countries evaluated, with an overall score of 23.0 (out of 100). This means that — apart from Iraq and Libya — Myanmar shows the poorest structural capability to effectively address illicit trade. Regionally, Myanmar is well behind its neighbours in both ASEAN (Singapore, 24th, Malaysia, 47th and Thailand, 48th) and APEC (e.g. Australia, 5th, Hong Kong, 12th).

The index is measured by four criteria - government policy, supply and demand, transparent trade and work processes on customs.

“In producing the Index, we found the overall policy environment in Myanmar is held back by fragile institutions and governance, which together enable the supply of illicit goods to both enter the country and transit through it onto other destinations. Low level of penalties, and weak coordination, monitoring and enforcement mechanisms on corruption, meanwhile, hinder the implementation of many anti-illicit

trade policies,” commented TRACIT and EuroCham Myanmar.

Illegal trade was the main obstacle hindering Myanmar’s economic development, the country’s government-owned paper said. As long as the illegal trade sector remained strong, it would be a huge hindrance to legal businesses.

Annual trade stands at US\$29.209 billion in fiscal year 2016-2017, US\$33.537 billion in fiscal year 2017-2018 and \$26.223 billion in fiscal year 2018-2019 (October to June), according to the Global New Light of Myanmar. Looking at these annual figures, maritime trade increased while border trade decreased. Decrease of border trade was found to be connected to the increase in illegal trade.

“Looking at border trade figures of Myanmar and Thailand in June 2019, there was a gap of more than \$ 150 million indicating how big the amount of illegal border trade was. Furthermore, illegal timber export effect[s] the economy as well as damaging [sic] the environment. Fake products, especially medicines and liquors damages the economy as well as endangering the consumers,” it said.

The paper argued that illegal imports through the border were also threatening the existence of small and medium-sized enterprises (SMEs) in multiple states and regions. •

Every quarter, **EuroMatters** conducts a personal interview with a Myanmar employee working at a European company in Myanmar. They share with us their personal story and life in Myanmar.

Working in a European organisation - from a Myanmar perspective

Can you tell us about yourself?

I am OHNMAR, I was born in Ayarwady Region but I went to high school and university in Yangon. After my university studies, I started learning French at the Alliance Francaise Yangon. When our country applied open-door economy policy in 1989, foreign investors started to enter the market, and I joined an American company established in Yangon. After 3 years, I moved to a European oil and gas company which was newly established as a subsidiary in Myanmar. Since joining in that company, I have worked in different positions and I am currently its Head of Public Relations and Communication.

How do you find working for a European company?

Working in a European company, I face lots of challenges in daily working life which I enjoy greatly. The working practices are systematically well-structured and organised.

I feel that I have been very lucky to work in a European company, which has high ethical standards and ensures equal chances in many aspects between foreign and national staff.

Did you face any cultural challenges working for a European organisation? How did you overcome them?

As my professional activities have given me many opportunities to travel



safety culture and ethical values mixed with our own local practices brought my performance to a higher level.

As Myanmar is one of the oldest oil and gas players, I believe that such good practices, high technology, well-structured administration and work-life balance working style coming from European companies are beneficial for the country and contributes to the development of the Energy Sector.

Do you speak or learn a European language?

Yes, English language is the second language I have learnt since elementary classes and French language is my additional proficiency.

What are your interest and hobby?

My personal interests and hobbies are travelling, reading, music and exploring nature; I am a plants and trees lover.

Have you ever been to Europe? If yes: What were your impressions? If no: What do you like the most about Europe?

Thanks to the company where I am now working, I could have several opportunities to visit Europe. I am very much impressed with the heritage and its conservation, antique structures and ancient buildings. What I like most are the world's famous museums where I can see breathtaking arts. •

to Europe and as I am working daily with foreigners, I have never felt any problems with the cultural differences. On the contrary, I am convinced that the cultural mix has enriched my capacities to deal with people. I also appreciate the openness and the respect of the foreign employees towards our culture and I enjoy sharing with them a deeper knowledge of Myanmar's history and our culture's background.

What have you learned from working for a European company?

Working in a European company certainly gives me a better understanding of people differences. The company's support through trainings made me gain more competences and more self confidence. The working practices mixing high technological standards,



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The EuroCham Myanmar Responsible Business Initiative has been created to support sustainability, equality and environmental protection practices. This section aims to raise awareness on these key issues by highlighting sustainable initiatives from our members.

First EuroCham Myanmar Responsible Initiative Breakfast Talk on Air Pollution



A platform to foster responsible practices in Myanmar, EuroCham is planning to regularly host EMRBI breakfast talks. The first edition was held on July 10, addressing air pollution to echo the World Environment Day celebrated on June 5.

If the United Nations chose air pollution as the theme of this year's World Environment Day, it is because this threat is indeed very present. Every year, air pollution is responsible for 7 million premature deaths worldwide, including 22,000 people in Myanmar, according to the World Health Organization.

In Myanmar, air quality is considered good during the rainy season but it reaches a peak every year from January to April¹. Being outdoors in Yangon last February was equivalent to smoking about 2.5 cigarettes a day, according to

research by Berkeley Earth. It also varies during the day: all year long in Yangon, air pollution is at its maximum from 5am to 8am and 6pm to 9pm².

Air pollution in Yangon is mainly coming from traffic, diesel generators, construction, factories, burning of waste in the city and burning of agricultural residue in the rural areas.

In his presentation, DR AUNG MYINT MAW, deputy head of the Environmental Conservation and Cleaning Department of the Yangon City Development Committee (YCDC) explained that YCDC has permanent air quality monitors around City Hall, Hledan Junction and Mingalardon Administrative Office. In addition, they have 64 mobile stations in industrial zones, public area, parks, disposal sites, among others. Data collections are taking place from 2016 to 2020, in order to create a data record and analyse the improvement or deterioration of the air quality. "Upon completion of our 5 years

project, we will make data evolution and then we will start a pilot project to beat air pollution." DR AUNG MYINT MAW said.

The event also had a panel discussion with representatives from some of the major industries in Myanmar: U MIN THU AUNG, Head of Business Sustainability and Special Projects of Telenor Myanmar; U NYAN WIN THU, Health, Safety and Environment Manager of Total E&P Myanmar; MR. NIKESH RAJ, Environment Sustainability Program Responsible of H&M and DR AXEL HARNEIT-SIEVERS, Country Director of Heinrich Böll Stiftung.

In the panel discussion, moderated by EuroCham Myanmar Executive Director MARC DE LA FOUCHARDIÈRE, participants exchanged ideas about initiatives, strategies and realistic scenarios that would be most effective in solving the problems of air pollution and energy efficiency. Some of the

topics covered were the opportunities to explore renewable energy and green technologies, the Myanmar Energy Master Plan or the recent increase in electricity prices.

One of the recommendations made to the government was to identify how much each source of air pollution contributes to the overall air pollution. Likewise, as there is a growing awareness among the general public concerning the negative impact of air pollution on public health, making data on air pollution publicly available would address the need for real-time information. Regarding sustainable energy, using more national low-carbon resources instead of environmentally damaging sources of energy such as coal and increasing the share of renewable energy is highly recommended. In that sense, Eurocham's Energy AG actively advocates for a more sustainable energy mix with a Position Paper that will support the EU Delegation's letter to the State Counsellor raising concerns about the high proportion of coal in the proposed energy mix.

rare because of the lack of land and governmental policies³, agroforestry seems to be an efficient alternative. Also called the *taungya* system, it was originated in Myanmar in the 1850s and has proven to bring numerous benefits on social, economic and ecological levels⁴. Regarding the quality of air, integrating trees and crops or livestock into the farming system removes atmospheric carbon dioxide, removes livestock odour, helps reducing wind velocity and also slows down soil erosion⁵.

Finally, domestic, industry and municipal waste management have to be improved. According to a study of the World Bank, by 2025 the solid waste generation in Myanmar is expected to reach 21,012 tonnes/day with 0.85 kg/capita/day⁶. As it grows rapidly and directly concerns the environment and public health, this issue should be a priority.

Prior and after the talk, attendees could see a photo exhibition set up by the European Union delegation in

the Heinrich Böll Foundation, a German agency for green ideas and projects also provides air quality report via their website.

This breakfast talk is the first event of the recently launched EuroCham Myanmar Responsible Business Initiative (EMRBI).

The EMRBI is EuroCham Myanmar's platform to promote the best of European responsible business practices and values. It provides EuroCham Myanmar members with the opportunity to share and exchange their practical expertise and know-how in managing their business responsibly as well as fostering positive and mutual collaboration among businesses, government, non-governmental organisations and the general public.

The EMRBI talks will be held on a regular basis, and the second event will take place on October 23 with the topic focusing on private sector and non-profit organisations collaboration in sustainable development. •

“ We need everyone to take action, from individuals and organisations to private companies and governments ”

MARC DE LA FOUCHARDIÈRE
Executive Director of EuroCham Myanmar

Ensuring a smoother traffic flow in Yangon will also improve the quality of air. Reduced congestion could be reached, for example, by implementing cycle tracks. Additionally, there is also a need to provide wider access to clean, affordable fuels and technologies for cooking, as burning fuels such as wood and coal in inefficient stoves or open hearths produces a variety of health-damaging pollutants.

Agricultural waste incineration, forest fires and agricultural fires (fires deliberately set to manage land) should be reduced, while agroforestry systems need to be encouraged. As shifting cultivation becomes increasingly

Myanmar revolving around the same theme. Through a 12 pictures display, alongside explanations in English and Burmese, the exhibition had for objectives to raise awareness on the sources of air pollution and steps that can be taken to tackle them. Moreover, air quality measurement devices were presented by Connect University students that they created themselves. The measures are updated twice a day and can be found on the students' facebook page called *Air Quality Yangon*. Another programme is implemented by *Purple Air*. 11 optical sensors are set up around Yangon and provide real-time air quality measures that can be viewed on www2.purpleair.com. Additionally,

¹ Data from <http://berkeleyearth.lbl.gov/>

² Data from <https://www.purpleair.com> - corrected with AQandU factor

³ LIVELIHOODS AND FOOD SECURITY FUND, 'Myanmar looks to agroforestry for its Uplands', 17/09/2015, <https://www.lift-fund.org/news/myanmar-looks-agroforestry-its-uplands>

⁴ 'Impacts of Agroforestry Practices on Local Livelihoods of the Ayeyarwady Delta towards Development of Community Forestry', The Republic of the Union of Myanmar Ministry of Natural Resources and Environmental Conservation, 2016. Forest Department <https://www.forestdepartment.gov.mm/sites/default/files/Research%20Books%20file/21.%20Ky%20Phyu%20Aung.pdf>

⁵ 'Impact of Agroforestry Systems on Ecological and Socio-Economic Systems: A Review', Indu K Murthy and al., 2016, Pondicherry University

⁶ QUICK STUDY ON WASTE MANAGEMENT IN MYANMAR, CURRENT SITUATION AND KEY CHALLENGES, 2016, Dickella Gamaralalage, Jagath Premakumara, and Matthew Hengesbaugh, of Global Environmental Strategies (IGES)

“

We are having a very positive trade balance
and tremendous support from Europe.

”

DAW KHINE KHINE NWE: PUSHING VOCATIONAL TRAINING AND LABOUR REFORMS

EUROPE IS the most important destination for many apparel exports from Myanmar, which currently enjoys tariff-free access to the EU's Single Market since 2013. Flanking measures have been implemented by the European Commission and European development partners to support reforms in Myanmar's fast-growing manufacturing industry, and in others with European export potential such as fisheries and agriculture.

The primary leverage for encouraging responsible business and respect for human rights has come through commercial partnerships which Myanmar businesses have with European and other Western investors, and the market access in Europe which come with an expectation of responsible and ethical supply chains.

This is particularly true of the apparel sector, which has now grown to employ over half a million, mainly young women, who would otherwise be working in rural poverty or risk being trafficked to Thailand and elsewhere.

EuroMatters sat down with business leader DAW KHINE KHINE NWE to look at the progress made in labour reforms,

vocational training, women at the workplace and EU-Myanmar relations.

A business woman leading garment manufacturer Best Industrial Co., she is also the secretary general of Myanmar Garment Manufacturers' Association (MGMA) and heads the UMFCI's corporate social responsibility committee. Her other public services include being chair of Myanmar Garment Human Resource Development Center (MGHRDC) and honorary principal of the UMFCI Training Institute.

This year is the centenary of Myanmar's top business body, the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI). DAW KHINE KHINE NWE is currently one of the two women among the 58 UMFCCI executive committee members and serves as the organisation's joint secretary general.

In the wide-ranging interview, she shared her thoughts on the changes and challenges of the institution, and offered advice to young women aspiring to be entrepreneurs and business leaders.



How have Myanmar's relations with the EU, including trade and investment, supported Myanmar's economic reforms in recent years?

DAW KHINE KHINE NWE • The EU announced the reinstatement of the Generalised Scheme of Preferences (GSP) to Myanmar in 2013 and relations have strengthened since then. As the majority of the people did not know much about the significance of the GSP at the time of announcement, there wasn't much difference in 2014. From 2015 onwards, however, trade between the EU and Myanmar - especially exports from Myanmar, has increased substantially. Three or four years back, we only exported around 500 million Euros worth of goods. The value grew to 2.3 billion Euros last year. In contrast, the total value of Myanmar imports from the EU is around 400-500 million euros. We are having a very positive trade balance and tremendous support from Europe. It creates jobs, raises standard of living and quality of life of our people.

Myanmar's government has enacted several new labour laws in different areas. Are these new regulations a step forward for labour rights and human rights?

DKKN • There have been positive developments in recent years with a number of important labour laws put in place, though some laws still need to be amended and revised.

“
[The dispute settlement law] is an excellent example of joint efforts from different business groups, working together on new policies.
”

For example, we recently passed the dispute settlement law. That was the result of very good cooperation between the foreign business chambers - including EuroCham Myanmar - and the UMFCCI. We worked together and managed to scrap certain penalties such as imprisonment for violation on administrative matters. The amendment was ultimately approved by the Myanmar parliament. That is an excellent example of joint efforts from different business groups, working together on new policies.

Overall, Myanmar is transitioning, in terms of its democratic as well as economic reforms and these will take time. A lot of labour law reforms have been carried out and the UMFCCI is part of this ongoing process.

The government and the UMFCCI have been quite active in the area of vocation training as well.

DKKN • Yes, the UMFCCI has been actively involved in vocational education programmes, and we have our own training centre. As an umbrella organisation, we have affiliated organisations in various sectors such as garment, shoes, construction and so on. These groups are also providing vocational education and we are supporting their efforts.

In the garment sector, we have set up the Myanmar Garment and Human Resource Development Centre which provides vocational education and skills training for jobseekers. We provide training courses for supervisors, leaders, managers and workers. The UMFCCI is also very much involved with the work of the National Skills Standard Authority because skilling is one thing but assessment of the skills is another.

So far we have completed 33 areas of competency standards in different occupations and assessments were done in 23 areas, including the garment sector. As of July, over 20,000 certificates have been provided and recognised by the National Skills Standard Authority.

The Authority has 15 working committees, covering manufacturing, construction, tourism and others. Under each committee, there are sub-groups, and I chair the manufacturing

competency standards committee which oversees five sub-committees. In every group, there are representatives from businesses and other stakeholders representatives, and we work with the government on what businesses look for in employee competency, skills and standards.

The government liberalised the education sector last year. Do you expect this to help the development of the vocational training industry in Myanmar?

DKKN • Absolutely, there have been a lot of foreign investment entering the education industry. At this moment, several vocational training centres were established by local business, some with the support of foreign investors.

This is where the EU plays a positive role - such as the 221 million euros in Overseas Development Assistance that the EU has provided to the Ministry of Education for traditional and vocational education. Quality assurance is now an integral part in reforming the education sector. The challenge of our business is how to scale up. With the EU's support, this is a boost in confidence for the private sector as well.

For me, this is proof that the EU trusts the Myanmar government. I'm very glad about this. The sector is very important as education is fundamental in every layer of life. Brussels is wise to support this.





This year is the UMFCFI's centennial. How do you feel about the progress as well as challenges for the institution?

DKKN • One of UMFCFI's strongest assets is our access to decision-makers in the government. We are the private sector's voice. Myanmar's vice president visits the UMFCFI every month together with ministers and senior officials from a wide range of ministries.

We have a regular dialogue with policymakers about economic policies and problems faced by business. We try to synthesise the input from affiliated organisations and raise them in the regular meetings.

The lack of skills and manpower remains a top challenge, both for us and the government. We are working with the Ministry of Education to see how we can collaborate with the universities and schools across the country.

You are one of the few female executives on the UMFCFI. What is your message to women in this country who want to succeed in the private sector?

DKKN • My advice would be: set a goal and pursue it, and never give up. Sometimes you have to look ahead and sometimes you have to look back to see how far you have come, and also how you have come this far. And don't waver. Setting a target, and being committed to achieving it, is vital.

“
Quality assurance is now an integral part in reforming the education sector. With the EU's support, this is a boost in confidence for the private sector as well.
”

I want to add that the UMFCFI will have a board election this year, three years after the 2016 election. I would like to see more women on the executive and leadership level of the UMFCFI.

Let's turn to more recent events affecting the economy. Can Myanmar's ambition to develop into a manufacturing base get a boost from the US-China trade war?

DKKN • I don't support trade war because that is detrimental to business, workers and the society at large. Myanmar can and should become a manufacturing hub based on the fact that we have natural resources and human resources which the economy can count on.

To make our manufacturing sector more competitive, we need to improve the skills of our workforce, our capacity to extract natural resources as well as along the value chain.

We are moving towards a more responsible and business-friendly environment, and we want manufacturers to come in because of what Myanmar can offer, and not because of the trade war.

The current government is very active in promoting the Myanmar Sustainable Development Plan (MSDP). What is the role of business and private sector in the MSDP?

DKKN • The role of the private sector is central to the MSDP. The Plan consists of three pillars, five goals and many strategies. In most of the strategies, the role of the private sector is stated to participate in the implementation of the Plan. We have to contribute to the achievement of the goal. That is why I say “we” - it is a partnership between government and business. One cannot do it alone. So to materialise in the MSDP - the ministries, the private sectors, and CSOs we all have to work together. •

Special thanks to Yangon Excelsior Hotel for the use of their premises.



In every edition, one of our partner members has the opportunity to be featured in the Success Story, wherein the details of an international investor coming to Myanmar are revealed. We are granted with a unique take on the challenges faced, as well as with an illustration of the potential they recognise which has motivated them to expand into Myanmar.

HOW ZUELLIG PHARMA IS MAKING HEALTHCARE ACCESSIBLE IN MYANMAR

ONE OF Asia's largest healthcare service groups Zuellig Pharma strives to make healthcare more accessible. The business started in the Philippines almost a century ago and has grown to cover 13 markets with 13,000 employees across the region.

Zuellig Pharma entered Myanmar in 2015, initially with the regulatory unit. The Yangon and Mandalay offices opened in 2017 to focus on sales and marketing services. A year later, the company decided to "take a leap" and set up its own country distribution network, supported by two warehouses in Yangon and Mandalay and deployed its in-house air-conditioned transport fleet. There are further plans to expand the existing warehouses in order to meet rising demands.

In an interview, country director FREDERIK MEERHOFF shared with **EuroMatters** his take on Myanmar's health industry and the progress made over the past few years.

"Since 2017, I have seen the Myanmar team grow from a small regulatory team to a full-fledged distributor with a team of over 100 employees."

"Myanmar is a large market with a young population that deserves the best healthcare in the world. The market has been developing quickly, with patients increasingly becoming more health conscious," he told this magazine.

In the past, affordability and access were two fundamental obstacles in Myanmar because there was always a shortage of medical products and, when they were available, patients often could not afford the treatments. Zuellig Pharma's mission is to unlock the barriers to access for patients across the country, not only in major cities but in rural areas as well.

One example would be a recent partnership with one of the largest manufacturers in the world for viral hepatitis medication. The company worked with the client to make first-line treatments for both Hepatitis C and Hepatitis B available to patients in Myanmar at an affordable price.

"With our extensive distribution networks and innovative cold chain storage system - eZCooler, we can deliver temperature sensitive products to the most rural areas across the country. We can reach patients across Myanmar within 24 hours to pharmacies and hospitals in most tier 2 and tier 3 cities!" MR MEERHOFF explained.

Myanmar's Ministry of Health (MoH) is working with a tight budget and spend on healthcare has been low, but he remains upbeat about the industry's prospects.

"I recognise that the current administration is focused on improving the environment for the healthcare industry and government spending on the sector has increased. Implementing the right technological solutions will

allow the MoH to scale up the impact of their spending," he commented.

In 2018, a large number of midwives were given tablets that included an app to provide them important medical information. The initiative sought to lower rates of maternal death and was implemented by the health ministry.

On the "payor" side, Myanmar remains an "out of pocket" market in which patients mostly pay for medicines and healthcare from their personal income or savings. The goal for this is to change towards 2030, the year in which Myanmar aims to be able to offer universal healthcare coverage to its population.

The private sector will be vital for the success of the mission, MR MEERHOFF went on. "With Zuellig Pharma now embarking on our sustainability journey, we look forward to collaborating with the MoH in the development of Myanmar's UHC."

As a frontier market, operating in Myanmar is not without serious challenges. One is ensuring the temperature-sensitive products are maintained during transportation. The company therefore needs to carefully manage its supply chain, and it does so by running its own air-conditioned trucks and using eZCooler, a cold-chain storage system keeping vaccines at the right temperatures (between 2-8 degrees Celsius) for up to five days during transportation.



Meanwhile, illicit trade and counterfeit products remains a major obstacle for the local industry. Parallel trade products - illegally imported - can seriously harm an individual's health especially when transportation and storage conditions are not done properly, while counterfeit products - fake altogether - could even be fatal to patients.

"We know that 1 in 10 drugs in developing markets are either parallel trade or counterfeit products and in Myanmar this number is likely higher because of the ease of entry through the long borders."

Zuellig Pharma continuously monitors and tracks temperatures and immediately disposes of products that have been compromised during transportation. In contrast, products brought in illegally, such as vaccines, have no controls in place and can bring serious risks for consumers. Hence, the company has prioritised the need to "fight the fakes".

"We have recently developed our blockchain application - eZTracker - that allows patients to simply scan the barcodes of medications to immediately identify and confirm whether the product is genuine. This way, we can

empower patients to take ownership and join us in the battle against counterfeit products."

MR MEERHOFF is hopeful that the eZTracker will be launched in Myanmar soon.

"As a company with a big presence in Southeast Asia for more than 70 years, Zuellig Pharma has played a key role in contributing to the healthcare environment. We are excited to do the same in Myanmar and believe that this is an excellent market to invest in - the golden land that has the future," he concluded. •

AGROBUSINESS

Unlocking the great potential of agriculture in Myanmar



De Heus is a fully foreign-owned company with extensive footprints across the country, supporting local farmers and keeping them free. Photo: supplied

ONCE THE world's leading crop producer and exporter, Myanmar's agricultural production in recent decades has lagged behind its neighbours, marked by low productivity and high volatility. Agriculture remains underdeveloped because of the lack of infrastructure and financing as well as land legacy issues. Production, meanwhile, is very labour-intensive and vulnerable to natural disasters and weather changes.

There have been huge progress in other fronts. Since the start of the democratic transition in 2011, Myanmar has liberalised and developed a number of key sectors, such as telecommunications, education, banking, retail and wholesale and, most recently, insurance. The IMF expects Myanmar's economy to grow 6.4% in the fiscal year 2018-19 (October 2018 to September 2019) if government spending picks up. This places Myanmar's growth trajectory well above the international average.

Despite the boom in numerous sectors, the national economy is still largely dependent on agribusiness. Agriculture as of 2017 contributes 30% to Myanmar's GDP, 25% of the country's exports and accounts for 56% of workers employed, official statistics suggest. Between 2010-11 and 2016-17, the agricultural GDP has grown on average at 3.2% per year, but slowed down in 2016-17.

"Myanmar is in a unique position to become an important export hub for agri produce. The country has vast amounts of land to grow and export corn, rice and other commodities,"

said FILIP LAUWERYSSEN, managing director of Dutch firm Royal De Heus. The country is already the only exporter of corn in the Association of Southeast Asian Nations (ASEAN), supporting the livelihoods of thousands of farmers.

"Let's not forget that in the past Myanmar was a world leading exporter of rice, making it the main feed engine of the massive British colonial empire. The potential is still there today, Myanmar can become a key producer and exporter of quality products that can feed one of the world's most dynamic and fastest growing regions of Southeast Asia and beyond," MR LAUWERYSSEN added.

The main crop groups produced here are rice paddy, beans and pulses and oilseed crops, with paddy leading the market share. Overall, more than 60 different types of crops are grown on 12.8 million hectares – equivalent to 19% of Myanmar's total land mass. Myanmar exported \$2.7 billion of agricultural products in 2016-17, while crop production accounts for 72% of agricultural output, according to data from the Ministry of Agriculture, Livestock and Irrigation.

Crucially, European companies are contributing to the modernisation and growth of this hugely important industry.

De Heus, as a fully foreign-owned business, works directly with farmers from all ethnic minorities and often in impoverished areas. The company's footprint is extensive. Unlike some Asian contract farming competitors, it supports the free market and keeps the farmers free.

"With our team of already 400 people - by far most of them are veterinarians -



we provide technical assistance, provide seminars to thousands of farmers, fly in experts from the Netherlands regularly to help the farms increase their productivity and boost their standards,” MR LAUWERYSSEN said. De Heus also supports the farmers with access to capital by connecting them with local banks and working with the commercial lenders on their agri-finance programs. In addition, the company regularly brings farmers to other countries in the region as well as in the Netherlands to show them first-hand how to improve their output and achieve international export standards.

De Heus is not alone. Bel Ga Myanmar, a joint venture between De Heus (49%) and Belgian Belgabroed (51%) established in March 2017, produces high-quality day-old chickens in the country. The business model consists of parent stock chicken farms in remote areas in Myanmar - to minimise risks of outbreaks - which produce hatching eggs for the hatchery. Within the hatchery, these hatching eggs are turned into high quality day-old chickens for independent farmers across the country.

“Bel Ga distinguishes itself in the market by producing the highest quality possible, this in a market which is still focussing on the quantities. By delivering this product in combination with education of our customers, maximum client profit can be realised which results in new bigger farm investments,” managing director BEN CLITEUR told **EuroMatters**. With this mission, Bel Ga competes against the integrated model - where one company which possesses parent stock farm, hatchery, broiler farms and the slaughterhouse - in order to support local farmers through suppliers and loans.

Others are also confident in the market prospects. Agriculture consultancy firm Fresh Studio set up its Myanmar branch in August 2016. Since then, business has boomed and the company is currently managing 10 projects, on top of the six it completed.

“Having in mind where Myanmar is coming from I’m quite impressed with the development and implementation of [food] standards and the eagerness

of involved personnel to make it happen,” said country manager ESTHER WINTRAECKEN.

The development and implementation of standards is only the first two steps, she added, and hence enforcement should quickly follow. “With enforcement you need to have the right tools in place on the basis you make a decision, eg. certified laboratories and quick tests.”

There are those who have been active in the country much longer. French yeast manufacturer Lesaffre has been in Myanmar since 1979 and is celebrating its 40th year of partnership with its local distributor Blessing Trading.

It was extremely challenging back in 1979 due to the political situation, import laws, payments, communications and other factors, explained CHARLIE LAMBERT, Lesaffre’s sales manager. Business has grown exponentially after four decades. Blessing Trading now imports several hundred tons of yeast every year, on top of several hundreds of kilos of bread improvers.

“Everything is now much easier for the ‘daily business’ - the political situation is more stable, payments are facilitated, import laws are easier and more flexible, communication with Lesaffre is also much easier,” he said. There is still a significant red tape compared to some other countries, but “nothing compared to 40 years ago.”

Food safety

The implementation of the National Food Law has led to positive changes in food safety over the past few years, but education on the issue will be critical, MR LAMBERT continued.

Myanmar authorities such as the Food and Drug Administration are now listening to industry players when ideas to improve food safety are put forward, he added. “They [policymakers] are more open minded than in the past, and willing to collaborate with private actors and listen to them.”

When it comes to food, standards matter. When not properly enforced, governments can fall or face the worst criticisms, warned MR LAUWERYSSEN. “I remember from my time in China how many children were affected by the milk powder scandal and the ‘heat’ officials faced from the angry mothers.”

“Myanmar’s standards are not there yet, there is too much use of many things that are forbidden in Europe and elsewhere. Nevertheless, much has improved over the years and with the right commitments, government support and access to finance one day sooner than later Myanmar will be able to offer quality products for competitive prices,” he explained.

Globally, one billion people are malnourished and over two billion suffer from a serious lack of essential vitamins and minerals in their daily food intake, according to the UN Food and Agriculture Organization. Nearly six million children die every year from malnutrition related deaths. FAO says

that is about half of all preventable deaths globally.

The majority of those suffering from malnutrition are mostly women and girls living in rural areas without access to healthy protein. The right to food is recognised in the 1948 Universal Declaration of Human Rights: “all human beings, regardless of their race, colour, sex, language, religion, political or other opinion, national or social origin, property, birth or other status have the right to adequate food and the right to be free from malnourishment.”

Different studies show that nearly 30% of children younger than 5 years of age suffer from chronic malnutrition. Lack of access to affordable proteins can have a huge impact on children’s development and the growth of a healthy future generation. MR LAUWERYSSEN stressed that it is therefore key for Myanmar to develop a healthy domestic agricultural sector that can feed the country’s next generation. •



Bel Ga Myanmar was established in 2017 and is active in the production of high quality day-old chickens. Photo: supplied

AGROBUSINESS

Myanmar's agriculture dependent on land and logistics reforms



Agriculture consultancy firm Fresh Studio has been in Myanmar since 2016. Photo: supplied

THE SUCCESS of Myanmar's efforts to modernise its vast agriculture industry - which employs millions of people and remains a critical sector for the national economy - hinge on the country's logistics and land reforms.

Agriculture provides employment to more than half of the country's total labour force. This comes as no surprise because Myanmar's agribusiness is, even by regional standards, very labour-intensive. Most agricultural activities are carried out on small-scale farms, typically manually with low levels of mechanisation. This results in low output and farm profits.

A 2016 World Bank report estimated that around 80% of farmholders have less than 10 acres and a farmer in Myanmar only earns about US\$1.80-2.50 per day in monsoon season compared to \$10.00-16.50 per day in Thailand and \$7.80 per day in the Philippines.

The report "Myanmar: Analysis of farm production economics" found that agricultural productivity in Myanmar is low, irrespective of what indicators are used, limiting the sector's contribution to poverty reduction and shared prosperity. Low productivity is a result of multiple factors, many of them associated with the undersupply of quality public services such as research, extension, and rural infrastructure, in delivery of which the government has a key role to play.

The study added that Myanmar's farming systems are diversified more than commonly thought. While during the monsoon season most farms produce paddy, during the cool and dry seasons most farms produce crops other than paddy, mainly beans and pulses, oilseeds, and maize.

Poor practices are part of the problem. Many local farmers are applying fertilisers inefficiently or not using fertilisers with the correct nutrient balance, partly due to lack of knowledge and training. In October 2018, the Upper House of Parliament launched the first parliamentary inquiry into chemicals used in agriculture and their effects on the industry. The lack of access to irrigation systems are also an obstacle.

In response, the Department of Agriculture of the Ministry of Agriculture, Livestock and Irrigation launched Myanmar's Good Agricultural Practices (GAP) Protocol and Guidelines in 2017, with the support of the International Finance Corporation (IFC). The objective of the guidelines is to boost the productivity and profitability of farmers through sustainable farming.

The GAP Protocol and Guidelines for 18 crops including tomatoes, peanuts, rice, and chili, among others, guides cultivators on how to produce safe and quality products for the local and international markets. It further aims to improve access to quality agricultural inputs, and help farmers develop the requisite skills for sustainable farming through training and knowledge transfer.

The guidelines support the government's objective of increasing productivity, market access and competitiveness of the agricultural sector by improving the provision of quality inputs to farmers. Additionally, it helps lead to solutions for improved sustainable agricultural practices.

"The launch of the GAP Protocol and Guidelines is an effort to boost farmers' livelihood and develop Myanmar's agricultural sector, which will contribute to economic growth," said DR AUNG THU, the Union Minister of Agriculture, Livestock and Irrigation, at the time of the launch.

"Quality agricultural inputs will elevate industry productivity and quality, raising incomes and creating jobs along the value chain," commented VIKRAM KUMAR, IFC Country Manager for Myanmar.

Agriculture consultancy firm Fresh Studio has two projects involved in training farmers on how to comply with the Myanmar GAP standard for various crops and helping them to become Myanmar GAP certified.

This covers soil, water and product analysis as well as record keeping and monitoring, said ESTHER WINTRAECKEN, the company's country manager in Myanmar.

Logistics and illicit trade

Logistics presents one key challenge. Farmers are often forced to store harvested products to sell at a later time. The poor warehouse conditions mean the storage leads to substantial losses, which the IFC estimated to be at around 20%. The infrastructure and technology necessary for farmers and traders is also severely underdeveloped. Many local warehouses are completely lacking in operational equipment and technology, such as CCTVs, dock levellers or a stable power supply.

In response, some players are scaling up their capacity. The Yangon subsidiary of Delhi-based Sohan Lal Commodity Management (SLCM) secured a US\$3 million loan from the IFC this year. It plans to use the capital to expand its warehousing and logistics services in Myanmar.

The company handles cotton, black pepper, rice, wheat, pulses, maize, sugar and spices in Myanmar, for both imports/ exports and domestic consumption, according to SCLM



assistant manager DIKSHA ARORA. The Myanmar unit has managed 3.24 million square feet of commodity storage space in 127 industrial zones and handled 10.14 million tonnes of commodities.

Logistics players see that the infrastructure has gradually developed in urban areas.

“While infrastructure and transport remain challenging in many rural areas, warehouse facilities in Yangon and Thilawa have significantly modernised,” said TAKA AKI YABE, deputy managing director of logistics provider Daizen Myanmar.

Some warehouses in Thilawa Special Economic Zone can now cater for agricultural produce and have refrigerated systems in place. Daizen’s warehouse, for example, is designed in a way that can be turned into a cold chain facility when market demand arises.

Improvement in the reliability of the SEZ’s power supply is also a boon,

MR YABE added, because facilities storing temperature-sensitive products, including food, are dependent on electricity. This gives further guarantee about the food safety and standards.

Illicit trade is another challenge affecting the industry.

French yeast producer Lesaffre’s operations are undermined by illegal imports of bread improvers from Thailand, said sales manager CHARLIE LAMBERT. Those smugglers do not follow import laws, fail to pay import tax and are not checked by regulators in terms of product standards. Representing more than 60% of the bread improver market share in Myanmar, illegal importers poses unfair competition and hurts the development of the formal economy.

Land reform in urgent need

Above all, a major obstacle in investing in agricultural is the issue of land tenure and land confiscation. Government

failure to give full compensation to landowners, coupled with a lack of secure land rights, poses problems in land acquisition for potential investors.

“Since agricultural success is strongly dependent on [avoiding] diseases - and therefore location - and time, it would be good if a central organ within the government could be appointed as responsible for land title conversion applications - fixed timeframe to be implemented,” said BEN CLITEUR, managing director of Dutch-Belgian poultry breeder Bel Ga Myanmar.

“In case the government approves an application based on the nature of the business, a set timeframe - Standard Land Title Conversion Procedure - should be shared so that this can be taken into account in the business case or model of the company,” he went on.

Bel Ga started with the construction of a hatchery in Myaung Dakar Industrial Zone, operations of which commenced in March 2018. The company assumed that the search and permits for the “parent stock land” would take six months maximum.

“Unfortunately, after visiting over 100 plots, we found very few that met our requirements, all located in remote areas, with no livestock or human activity in the area.”

The government only allows livestock activities in appointed livestock zones, which is impossible with Bel Ga’s highly sensitive parent stock birds. The alternative is to undergo a complex land title conversion process.

“Although not one government authority could inform us exactly about the timeframe of the land title conversion, we signed a land lease contract in July 2017 and submitted our application. After months of waiting, we found out that the steps within the process changed and a delay was caused by internal communication within departments.”



“Today, more than two years after signing the lease agreement, we are still waiting for our Land Use Rights. This delay resulted in high losses as we are forced to import hatching eggs from Europe and an IFC loan which can’t be disbursed,” MR CLITEUR commented.

The dilemma facing international investors, more broadly, is made all the more complicated by the Myanmar authority’s rapid implementation of the amended Vacant Fallow and Virgin (VfV) Lands Management Law - adopted in late 2018 - which requires those currently using VfV land without Central Committee permission to apply for a permit by March 2019.

Farmers organisations, civil society organisations and NGOs criticise the Amended VfV Law and its accelerated implementation as having a “great potential to increase land conflicts and grievances rather than resolve them and make individuals and communities trespassers on their own land.”

Meanwhile, the Myanmar Centre for Responsible Business (MCRB) warns that the move would cause significant problems for investors seeking to operate responsibly in the country. The government estimated that almost one third of the total area of Myanmar is categorised as VfV land.

Land has constantly been identified by the responsible investors, including those from Europe, as their biggest human rights and due diligence risk. Many companies give up in view of the uncertainty around land ownership and unquantified liabilities due to land acquisition legacies undertaken at the expense of land users’ human rights. This reduces the willingness of international entities to invest in Myanmar.

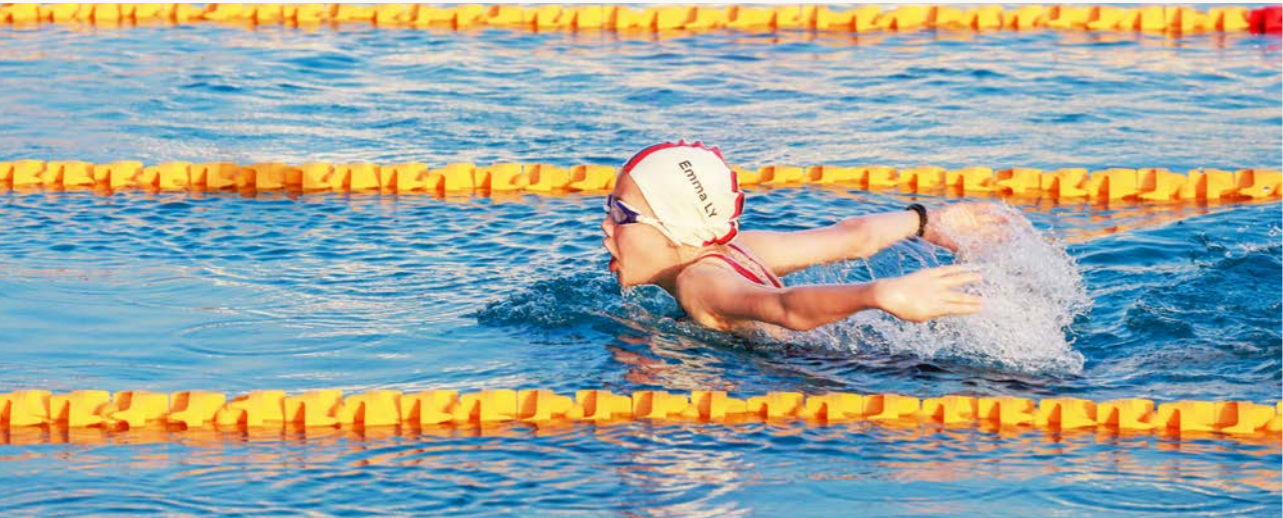
Investors also specifically raised with the MCRB their concerns about the implementation of the amended VfV Law, and the further complexity it introduced for companies seeking to abide by Myanmar law.

Myanmar’s government signed and ratified the International Covenant on Economic, Social and Cultural Rights (ICESCR) in 2017, meaning that local law needs to be aligned with the Covenant. Currently, a number of land laws, and amendments to those laws including VfV, are not compliant with the ICESCR. This causes problems for responsible investors as well as for the formal and customary users of land.

In a letter - seen by **EuroMatters** - addressed to the National Land Use Council and VfV Land Management Central Committee, MCRB director VICKY BOWMAN suggested that implementation of this amended Law should be halted, pending an expert review of its human rights impacts, and that future amendments should be made to bring the VfV Law - and other draft laws related to land - in line with Myanmar’s ICESCR obligations and consistent with the 2016 National Land Use Policy. •



Dulwich College Yangon - an International School where ‘Students Come First’



WITH TWO campuses in Myanmar - one located next to the Pun Hlaing Estate in Hlaing Tharyar township, and the other in the Star City development in Thanlyin - Dulwich College Yangon provides students with an exceptional international school education, supported by world-class facilities set within inspiring landscaped grounds.

The Star City campus is home to a 50-metre Olympic-sized swimming pool, a 20-metre training pool, a multi-purpose indoor gymnasium, extensive playing fields and access to a golf course. The Pun Hlaing site, meanwhile, boasts a 250-seat black box theatre, science laboratories, art design and technology studios, welcoming outdoor learning spaces, two libraries and sports facilities that include swimming pool and golf course access.

The curriculum at the college is unique to the Dulwich College International family of schools.

“Our aim is to provide our students with a truly holistic education, that allows them to graduate with far more than a great set of exam results,” headmaster DARYL ORCHARD told **EuroMatters**.

“For example, our commitment to environmental issues has a real impact with our children precisely because we have extensive outdoor gardens where students learn to care for the environment and grow their own produce,” said MR. ORCHARD. To support this statement, the Pun Hlaing campus recently became the first school in the country to be bestowed with the prestigious ‘Green Flag’ environmental award. Head of Pun Hlaing Campus, GRAHAM HORTON said “We were delighted to be the first school in Myanmar to be awarded the prestigious Green Flag Eco Award following a rigorous inspection visit. Our commitment to sustainability and to educating our students to care for the environment is a key feature of our community-focused campus.”

The original Dulwich College was founded in the 17th century by actor EDWARD ALLEYN in southeast

London. With four centuries of history to draw upon, Dulwich College Yangon has a strong sense of belonging and a shared heritage that connects it to the other Dulwich schools from campuses across the globe.

“Centered on this strong defining ethos, we are able to diversify our curriculum to make it more meaningful to a Southeast Asian context. Similarly, whilst the English National Curriculum provides a solid framework for the development of learning, as an independent school we want our students to be challenged by more difficult and diversified programmes of study,” the headmaster continued.

Crucially, Dulwich College Yangon has rolled out its first scholarship programme for gifted students, enhancing Myanmar’s educational landscape and aimed at developing the leaders of tomorrow. Last year, the school awarded scholarships to 29 students across both campuses. The majority were given for academic ability, but some were awarded for outstanding performance in sports. The scholarships provide up to 50% discount

off the standard school fees, on top of the \$5,000 Founder’s Bursary which is currently awarded to all new students. This has significantly expanded the number of children who will be able to benefit from a Dulwich education in Myanmar.

Dulwich College Yangon’s vision and mission is for students to “Live and Graduate Worldwide” – to have the skills and motivation to make a positive difference in the world. The school ensures that students become independent and self-directed learners, equipping them with the flexibility, resilience and creativity to prosper anywhere in an increasingly globalised society.

“Knowing that there are no limits to their learning, and having access to the very best teaching and resources, students are consistently encouraged to perform above expectations. Through the careful analysis of data, our teachers have a deep understanding of each student’s abilities and are able to give them regular feedback on how to improve their own learning,” MR. ORCHARD added.

In August, Dulwich College Yangon’s international boarding house finally opened its doors in Star City, welcoming the first batch of boarders. It is Myanmar’s first international boarding house.

“Dulwich College Yangon’s first boarders truly are modern day pioneers. Boarders at Dulwich College Yangon will gain independence, thrive within a family orientated House, experience enriching opportunities to become important members of the community and develop the skills to prepare them for life at university,” said head of boarding ADRIAN JORDAN.

Students can opt for termly, weekly and flexi-boarding. Termly boarders stay at school seven nights a week, weekly boarders stay for five nights a week and flexi-boarders stay for one or more nights a week.

“The boarding house is a multicultural environment where students from across Myanmar and the rest of the world are welcome,” MR. JORDAN added. “A boarding taster session can be arranged for anyone who would like to give it a try for one night.”

MR. ORCHARD added that Dulwich College Yangon has an experienced Head of Boarding and a team of dedicated boarding staff, who provide 24-hour care for the boarders.

Ultimately, Dulwich College Yangon’s philosophy is “students come first”. Head of Marketing, ALOK KAPUR, explained that “we put our students at the heart of everything we do and all our initiatives are linked to this core purpose.”

This view was corroborated by the students at the College. One noted that “the teachers at Dulwich give us time to review our past work and always give ideas on how we can make it even better still.” Another explained that “I always feel comfortable answering questions and asking for explanations, as we know that an important part of learning is making mistakes, and being able to work out another way to succeed.”

All in all, Dulwich College Yangon is an exciting place to learn. With increasing numbers of students joining the two campuses and with further expansion of its world-class facilities already underway, the school is poised to go from strength to strength. •



TACKLING CONSUMER DIGITAL BEHAVIOUR IN BRAND BUILDING

TELECOMMUNICATION WAS the main area of foreign investments and competition was intense among the three brands, Qatar based Ooredoo, Norwegian Telenor and the national operator MPT. The previous \$2,000 worth of sim cards were now \$1 and the hype train welcomed all those internet hungry citizens onto mobile data which eventually ended up with the title “world most mobile-centric market”. Smartphone penetration rocketed across urban and even rural areas and Facebook became “The Internet” for Myanmar. From brand owners’ perspective, this poses both challenges and opportunities to craft a healthy relationship with consumers and the importance to explore Myanmar’s evolved media landscape and to understand consumers’ behavioural shifts and online usages have become inevitably vital.

Although the average device ownership of Myanmar is lower than the one of Emerging Asia and that the global average, the country is the highest in terms of time spent on a smartphone. This extremely high level of device centrality results from the phase jump where people adopt mobile data without being familiar with

internet browsing experience using a personal computer. Pager, feature phones and the whole internet era were missed when touch screen phones were introduced bringing in user-friendliness and portability. Naturally, PC ownership dips to 12% and even further to 9% for tablets. The most commonly used device in Myanmar is thus smartphone, taking up 96% of the time spent whereas it’s only 60% for Emerging Asia and 54% for the global average.

Facebook is the most commonly used social media platform followed by two Instant Messaging apps Messenger and Viber. Consumers’ key activities would also include reading online articles, following updated news and watching videoclips. Consequently, these three platforms are the most effective online advertising options for the Brands but whether the current online ads are effective in connecting with the consumer comes into question. Many factors need to be considered whenever we talk about audience engagement but most importantly, there will practically be no point to measure or promote “impact” of the contents we’ve communicated if our audience refuses to hear them. Adblocking has become a major concern to online advertising as consumers in most developed markets are increasingly seeking ad blockers. But here in Myanmar, the opportunity to gain higher reach through online

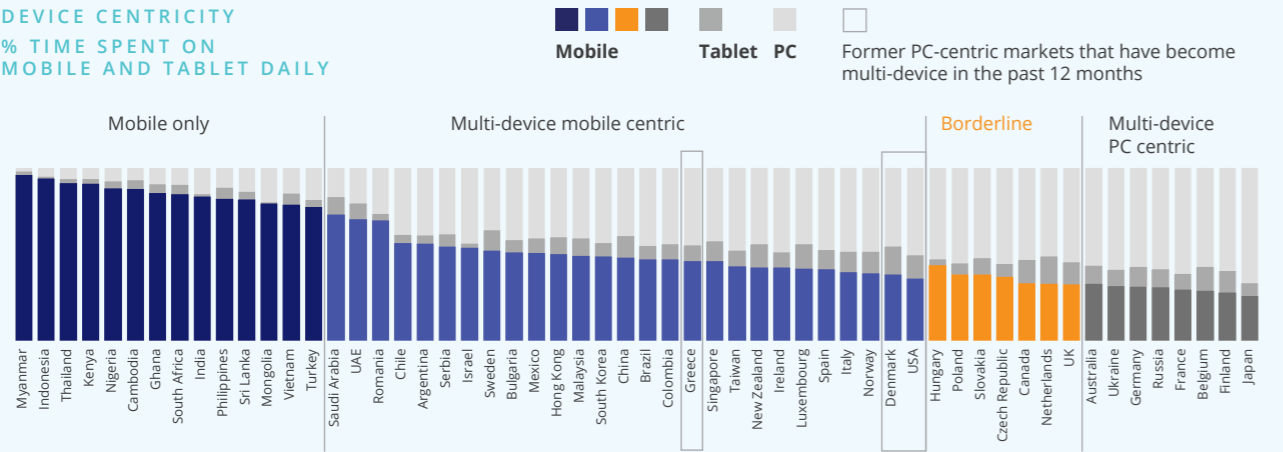
advertising still stands strong as only 1% of online users use ad blockers compared to the global average of 18%.

The effectiveness of mobile ads is dependent on consumer interaction with brands online

The punch comes with a powerful impact straight to marketers and ad agencies. The hurdle stands fast for brands since Myanmar consumers have extremely low interactions with brands online. Brands need to start focusing on how best to interact with their consumers online. Having very few alternative channels options, especially since Facebook is the most used social media platform in Myanmar, it is critical that brands have a capability to create memorability, affinity and saliency with their consumers on Facebook. However, Myanmar lacks the necessary consumer-brand connection to strengthen the bond as it falls in the bottom two countries for brand interaction on Facebook compared to the rest of the world in these categories: watch brand video, follow brand, ask a brand question, complain about brand.

The most sensible culprit to brands lacking consumer interactions online is Facebook being an ineffective touchpoint with no impact on a brand.

DEVICE CENTRICITY
% TIME SPENT ON MOBILE AND TABLET DAILY



“We consistently found in a survey in which respondents were asked whether they have seen the given ad on television or on social media; most responded that they saw it on television despite the fact that it has never been aired on television but was promoted online,” said a Research Director from Kantar Myanmar. Therefore, it proves that the touchpoint did not grab the consumer’s attention enough for them to recall which channel they saw it on.

Most often the advertisements shown in online channels have the same designs as the ones used on television. It is known that consumer behaviour and attitude change as people move to different platforms, so the designs should adapt respectively.

“Kantar has been incorporating behavioural science in research approaches. We believe people make decisions by using ‘fast intuitive

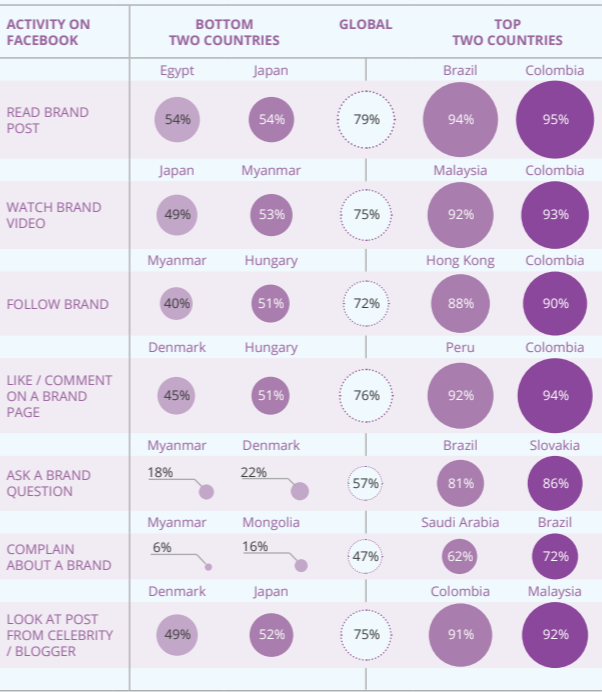
brain’ and ‘slower reflective brain’. It is imperative for the brands to have a presence in consumers mind aka mental shortcuts in order to be included in product consideration which in turn result in decision making,” says Creative Expert from Kantar Myanmar. There’s an opportunity in the market to effectively utilise Facebook as a touchpoint by creating the right moment for its consumers and designing creatives specifically for online channels. The use of traditional creative ads designed for television will not connect to the consumers in the same way if used for online purposes.

Interesting use of the online channel is seen in Thai commercials. They have found that perfect spot between capturing the user’s attention and emotions without stepping over the line and creating a negative impact. The success of Thai’s commercials uses moment marketing to influence it’s viewers and allowed the advertisement

to go viral by intruding not only Thailand’s market but in other markets as well. Marketers believe in good brand stories and the emotion consumers implant into such brand association. But this doesn’t necessarily mean it’s the most effective in advertising digitally. Brand meaning is fundamental, but the alchemy wouldn’t be completed without an additional element. Kantar’s BrandZ™ report analyses that brand growth requires a disruptive nature in its core. Disruption ensures brand memorability and helps improve brand saliency which in turn strengthen mental shortcuts in consumers day to day decision making processes.

Marketers should get out of the conservative digital crate and grasp brand disruption in their meaningful storytelling to create the brand memorability and eventually growth. This alchemy will differentiate between a trendsetter and a follower. •

BRAND INTERACTION ON FACEBOOK
% OF RESPONDENTS THAT UNDERTAKE ACTIVITY



	GLOBAL	EMERGING ASIA	MYANMAR
Average time spent on social (hrs/day)	1.5	1.3	1.6
Average number of social platforms used weekly	8.4	10.7	2.6
Platform weekly usage >30%	FACEBOOK YOUTUBE WHATSAPP FACEBOOK MESSENGER WECHAT INSTAGRAM	FACEBOOK WECHAT YOUTUBE MOMENTS (WECHAT) QQ WHATSAPP FACEBOOK MESSENGER QQ SPACE WEIBO	FACEBOOK FACEBOOK MESSENGER VIBER

KANTAR TNS

KANTAR: INSPIRATION FOR AN EXTRAORDINARY WORLD

Kantar TNS is one of the world’s largest research agencies with experts in over 90 countries. With expertise in innovation, brand and communication, shopper activation and customer experience, Kantar TNS helps clients identify, optimise and activate the moments that matter to drive growth for their business.



ASSOCIATE DIRECTOR
KYAW ZINNI



EVENTS ON REVIEW

THE SECOND edition of the Anti-Illicit Trade Forum took place in Naypyitaw on September 19, 2019. Organised by EuroCham Myanmar and the Anti-Illicit Trade Group, the event aimed to gather relevant players from private, public and associative sector to enhance dialogue to find better solutions regarding a hot topic that is hindering Myanmar's economy.

The expectations were high as remarked by H.E. U SOE WIN, Union Minister of Planning and Finance, who opened the forum praising the 2018 edition of the Anti-Illicit Trade forum and Eurocham's work.

This forum edition put an emphasis on the loss of tax revenue due to illicit trade and a study commissioned by EuroCham revealed that the total amount of 2017-2018 seizures represented only 0.4% of the illicit trade value, a relevant figure that illustrates the huge effort still to be made.

To link those results with concrete facts, all participants, including government representatives and media, were invited to experience an illicit trade exhibition showcasing seized smuggled and counterfeit products from various sectors. High level government representatives discussed with European companies the extent of illicit trade, as not only beverages and tobacco are affected but also flower bulbs and consumer goods like bread yeast.

A panel comprised of speakers from Internal Revenue Department, Anti-Corruption Commission and Financial Intelligence Unit as well as Anti-Illicit Trade AG Co-Chair agreed

19 SEP • THUR • NAYPYITAW Anti-Illicit Trade Forum

on the necessity for adjusted regulation to enable stronger enforcement. Private sector's foreign companies stressed how affected they were by the lack of enforcement.

Members from the Customs Department, Myanmar Police Force, UNODC and Private sector representatives agreed that a comprehensive strategy is key and should include technological development, a solid legislative framework, market mechanisms, better collaboration between ministers and between public and private sector. The effort should be regional to avoid the illicit activities to move from one place to another.

Four roundtables were held to discuss the impact of Illicit trade on Consumer Goods, Intellectual Property, Agribusiness and Health sectors. Various experts discussed about possible practical solutions and pointed out the lack of enforcement of existing laws as well as the need to raise awareness among consumers to choose legitimate products. In addition, a common remark highlighted the necessity to have more Public-Private Partnership to help government move forward and get financial support and resources to achieve an effective response to the varied illegal activities.

As the government created last June the Illegal Trade Eradication Steering Committee to set up policies, strategies, short and long-term work processes, the forum came at the right time to enhance the dialogue and showcase the reality of this hidden yet huge phenomenon. •



In every edition of the hospitality section, **EuroMatters** presents a list of inspiring places across Myanmar that will allow you to further discover the country and explore all the diversity and richness of its culture.



ANY ADVENTURE in Myanmar cannot be completed without a trip to the iconic Bagan. When travelling there, you might consider staying at The Heritage Bagan Hotel where traditional architecture meets all the modern commodities desired for a truly relaxing stay. Besides, if you are looking for ways to green your travels, take a closer look at KiwiGo – not a travel agency like another, but a social enterprise supporting local communities and promoting eco-tourism.

HERITAGE

Heritage Bagan Hotel: The Dynasty Awaits



The Heritage Bagan Hotel is ‘heralding a new dynasty’, inviting guests to embrace and experience warm Myanmar hospitality, served with a passionate heart. Guests exploring the premises will find the hotel’s unique design – twelve stunning structures that symbolize the twelve dynasties of Myanmar, influenced by the ancient Buddhist temple architecture in the old city of Bagan. Upon arrival, guests are greeted to sky-high pillars assembled in teak wood and decorated with traditional crafts. From the landscaped garden made of palm trees, tropical plants and ponds, emanates a sense of cosiness and genuine atmosphere. The facilities, including a pool, poolside bar, outdoor dining area, and rooftop bar, allow guests to enjoy a refreshing cocktail and fine dining within this serene environment. If guests crave a quick bite, The Heritage Café offers a wide variety of options.

Guests will enjoy the hotel’s proximity to the airport and nearby attractions including the Iza Gawna Pagoda, viewing hills and tower, Bagan Nyaung Oo Golf Club, and **5 minutes walking distance UNESCO Monument Zone**. The new city of Bagan and the road to the famous Mount Popa are also easily accessible. •

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SOCIAL ENTREPRENEURSHIP

A travel social enterprise, advocating SDG: Sustainable Development Goals in Myanmar

Millions of global travellers have visited Myanmar to explore the beautiful scenery, historic sites and pristine beaches.

Established in February 2019, we are now providing All in One Travel Solutions at 7 locations: Yangon, Mandalay, Naypyitaw, Bago, Taunggyi, HpaAn & Mawlamyaing. KiwiGo is more than a travel agency, representing a community of responsible travellers, working and traveling together to practice the UN’s Global Goals for Sustainable Development and Green Policy by GreenWill.org.

As a social enterprise, KiwiGo contributes to local communities by promoting community-based, responsible and eco-tourism. We passionately aim to turn the travel industry into a driving force for a sustainable change, focusing on 3P: People, Planet and Partnership. For instance: every month we arrange a free seminar named “Empowering Social Entrepreneurship”, and 1700 plants are rooted for #OnePeople_OnePlant campaign so far, among other activities.



KiwiGo business model is forged on partnerships with a diverse group of local CSOs and forward-thinking companies that recognise the importance of sustainable travel.

Our message goes viral via social media and our satisfied partners. Marketing budget are given to these CSOs, utilising them to fund their projects.

Key Message: Every single time You Travel with KiwiGo, we donate to charities. •

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E. ethan@kiwigo.co
[f@kiwigo.co](https://www.kiwigo.co)

2019

WHAT'S ON

In this section, the most notable events of the upcoming quarter are highlighted. From the Breakfast Talks to the newworkings, be sure not to miss out on these essential events in Myanmar.

More information on our website:
eurocham-myanmar.org/events/upcoming

EMRBI Breakfast Talk: Private sector and non-profit organisations collaboration in sustainable development

The 2nd Breakfast Talk organised by EuroCham Myanmar Business Initiative (EMRBI) will be focusing on cross-sector collaboration. In Myanmar where the market is still opening, the collaboration between not-for-profit organisations and companies on sustainability remains rare but is yet essential to encourage responsible investments and projects.

Our panellists coming from NGOs, developments aids agencies and the private sector will explain how their organisations are seeing the benefits of greater engagement in cross-sector partnerships, how to build a more strategic approach to sustainable development and will share concrete examples of their experiences.

23 OCT
 • WED •
 YANGON

03 OCT
 • THUR •
 YANGON

Breakfast Talk with EU Ambassador to Myanmar

The event is a continuation of an initiative from EuroCham to establish a regular consultation platform between the EU Delegation and EuroCham advocacy members.

On that occasion, H.E. KRISTIAN SCHMIDT, EU Ambassador to Myanmar, will discuss the business climate in Myanmar and the EU response on HRC report and anticipated implications for EU businesses. Advocacy groups co-chairs will also present brief updates on the current state of affairs in their respective sectors in Myanmar.

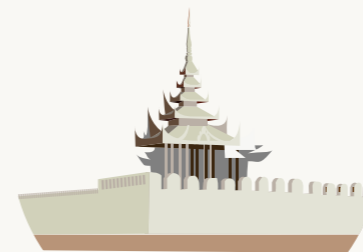
This event is for EuroCham members only.

Tax breakfast talk on recent tax changes

The next Legal & Tax Breakfast Talk will address the challenges companies might face regarding the newly established Tax Administration Law and the renewed 2019 Union Taxation Law effective since 1st October 2019. The Tax Administration Law (TAL) 2019 is intended to maintain consistency in the administration of various tax laws, and to enhance efficiency and comprehensiveness for the taxpayers. The 2019 Union Taxation Law (UTL'19) is a yearly enacted union taxation law that covers specific goods tax, commercial tax and income tax, effective from 1 October 2019 to 30 September 2020. As both enactments will influence tax payments significantly, the talk will gather a panel of experts, stakeholders and a government representative to provide an overview of what this will entail for the business community.

25 OCT
 • FRI •
 YANGON

20 OCT
 • SUN •



IN THE
 MEANTIME,
 IN MANDALAY...

Mandalay Region Chamber of Commerce & Industry (MRCCI) monthly talk

In this edition, the focus is on "Smart City, Smart People and Smart Management." Joining as speakers are Linn Theik Nyunt (Myanmar Land) and U Htin Lin Kyaw (Internal Revenue Department), who will share their knowledge on business management and revenue-related topics.

The panel discussion will be moderated by U Kyaw Yin Myint, joined by three panellists who are young entrepreneurs, AUNG LWIN AYE (Sein Sabai Phoo Jewelry Shop), PHYU PHONE PYAW KHINE (Mandalay 72 Language Center) and MOE HTET KYAW (Shwe Bite).

The event will be held from 1pm to 5pm. Visit [@mrccimdy](https://www.facebook.com/mrccimdy) for the latest updates.

10 DEC
 • TUES •
 YANGON

Launch of EuroCham Business Confidence Survey and Business Guides

EuroCham will publish the updated Business Guides 2020 – a general and six sectoral guides on Agriculture, Consumer goods, Garment, Energy, Health and Manufacturing, which will provide up-to-date, entry-level information to European companies planning to invest in Myanmar. Additionally, the Business Confidence Survey 2019 will reveal the latest business sentiment from European businesses operating in Myanmar.

All results will be presented during the official launch event and will be commented during panel discussions with European bilateral chambers and Eurocham Myanmar advocacy co-chairs.

JAN
 • •
 YANGON

Joint European chambers networking

The 7 European Chambers, BritCham, CCI France Myanmar, EuroCham Myanmar, German Myanmar Business Chamber, Chamber of Commerce Italia-Myanmar, Myanmar Norway Business Council and SwedCham are pleased to invite you to the 6th edition of Joint European Chambers Networking event.

More information to come soon.



Thank you to our
partner members

PLATINUM



GOLD



SILVER



The voice of European business
in Myanmar

ADVOCACY

BUSINESS SERVICES

EVENTS

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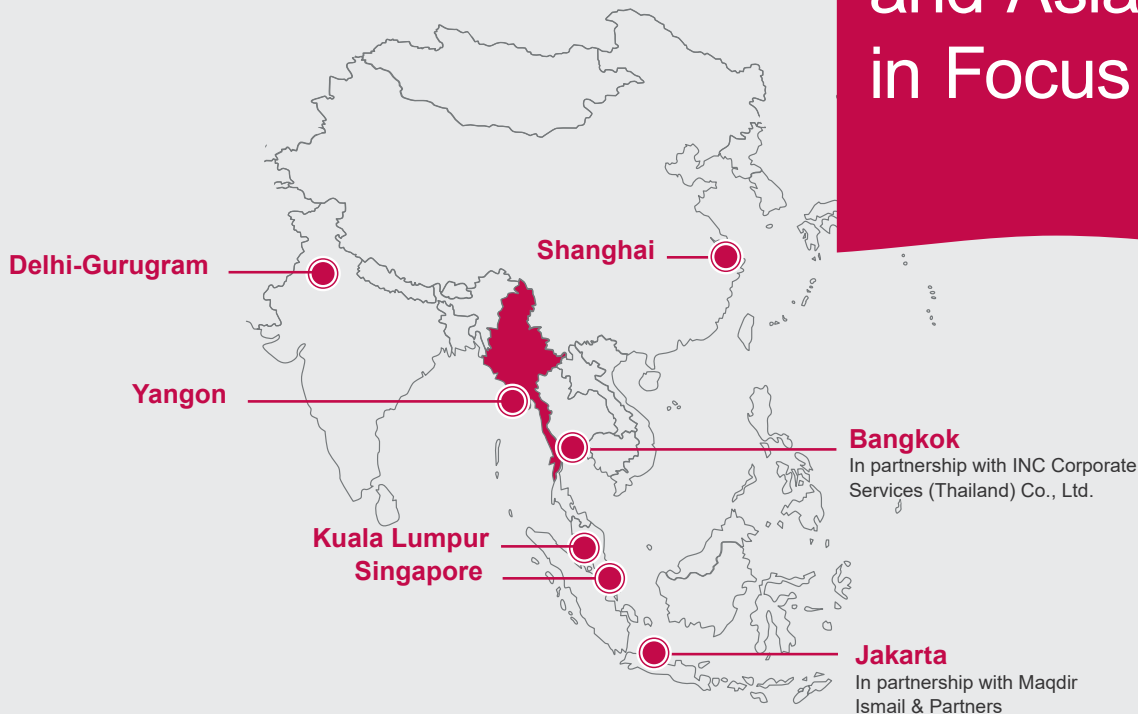


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Myanmar and Asia in Focus



With a team of more than 50 European and Myanmar lawyers and internationally trained professionals in our office in Yangon, Luther has the competence and expertise necessary to comprehensively assist and advise our clients on all aspects of corporate and commercial law as well as regulatory compliance, including:

- Legal advice
- Tax advice
- Incorporation services
- Corporate secretarial services
- Bookkeeping and Accounting
- Tax Compliance
- HR administration and payroll
- Payment administration

Our Myanmar clients comprise of international and multinational private investors, MNCs and SMEs, Myanmar businesses and conglomerates as well as embassies, state owned enterprises, international development organizations and NGOs.

With 13 European and 7 Asian offices and partner firms, Luther is one of the top addresses among German commercial law firms. Knowledge of the market in which our clients are active is a prerequisite for providing successful advice. That's why our lawyers and tax advisors, in addition to their specialized legal knowledge, also focus on advising clients from particular industries.



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