

Labor Market Survey

Tanintharyi Region, Myanmar
February 2017



Prepared by
Axel Schroeder

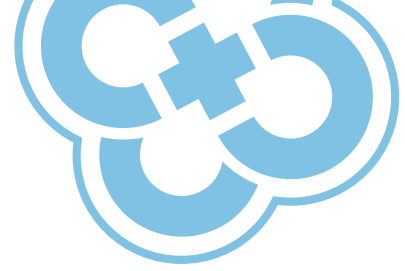
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Any errors of substance and argument rest with the author.

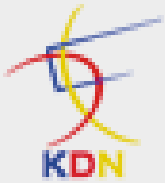
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List of Acronyms

CSO	Central Statistic Organization	KII	Key Informant Interviews
EAO	Ethnic Armed Organization	KNU	Karen National Union
ELDP-Project	Enhanced Livelihood for Displaced People-Project	KVTC	Karen Vocational Training Center
GDP	Gross-domestic product	LIFT	Livelihood and Food Security Trust Fund.
HHs	Households	SEZ	Special Economic Zone
IDP	Internal Displaced Person	VTC	Vocational Training Center
ILO	International Labour Organization	VT	Mother tongue based education

Currency Exchange Rate (28.01.2017) / 1 USD = 1350 MMKs / 1 EUR = 1430 MMKs



KAREN DEVELOPMENT NETWORK:

founded in January of 2004, with a vision of promoting human rights and human resources development for the Karen people, regardless of faith. KDN's social outreach concerns are especially catered to the dire needs of those who are the direct victims of ongoing-armed conflict including IDPs. KDN seeks to promote community development through peace-building initiatives in its areas of influence; and intervening to promote citizen empowerment through building the capacity of individuals and community-based organizations to access and obtain sustainable livelihoods, income generation, health and education, including the promotion of technical know-how and expertise.



TANINTHARYI KAREN PEACE SUPPORT INITIATIVE:

TKPSI is a unique network of community based Karen organizations working in conflict-affected areas of the Tanintharyi Region. The network was established in 2012, as part of the Myanmar Peace Support Initiative's (MPSI) strategy to establish pilot projects in conflict-affected areas, which support the peace process and build trust and confidence among conflict actors. TKPSI has been given the unique mandate/permission by the GoUM (President's office) and the KNU to carryout humanitarian aid and development projects in ceasefire areas.

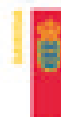


covenant consult

COVENANT CONSULT CO. LTD.:

Covenant Consult is a Yangon based development consultancy and was established in 2011. The organization focuses on supporting local NGOs and INGOs, through capacity building, project proposal development and monitoring & evaluation.

The 'Enhanced Livelihoods and for Displaced People' (ELDP) Project is funded by the Livelihood and Food Security Trust Fund (LIFT).



Hair-dress and beauty salon in Dawei





1. Executive Summary

As Myanmar is reemerging from decades of economic and political isolation, it has become one of the fastest growing economies of the world, striving for inclusive growth and poverty reduction. As more and more foreign investors are entering the market, the transition from agriculture based to a more goods producing and service orientated economy slowly appears.

Myanmar, however, faces a number of significant challenges. While the country must achieve and maintain macroeconomic stability it must also lead the progress of a fragile peace and reconciliation process. To increase social and economic development, the country must tackle substantive infrastructure and human resource deficits.

The Enhanced Livelihoods for Displaced People Project (ELDP) Consortium commissioned a labour market survey at the end of 2016, with the aim to provide adequate information regarding the labour market of 3 townships (Dawei, Tharyetchaung, Palaw) in the Tanintharyi Region with a focus on Internally Displaced Karen People. Furthermore, the findings of the survey helped identifying potential vocational training courses for the Karen Vocational Training Center (KVTC), which will be established as part of the 3- year Livelihoods and Food Security Trust Fund (LIFT) funded project.

The Tanintharyi Region, located in the deep south of the country, is historically heavily weighted on the agricultural and fishery sector. Due to government policy aimed at rapid expansion, large palm oil and rubber plantations were planted along the coastline commencing at the end of the 1990's, with little regard to land occupation by local populations, land suitability, conservation of forest reserves, water sources or endangered species. While the region has enormous economic potential, it is hampered by lack of infrastructure, sufficient power supply and a well functioning financial market. In addition, the construction of the Dawei Special Economic Zone and related infrastructure projects have been stalled since 2013 and it remains unclear if and when the project and related activities will re-start.

The labor market of the Tanintharyi Region can be considered as underdeveloped. Though the unemployment rate is considered low, more than 80% of the labor force in the region is self-employed. The income situation is comparatively low, the more so as the income situation heavily depends on the agricultural harvest and lean season. During the harvest time the demand for unskilled workers is quite high, while during the lean season most of the people living in rural areas lack sufficient income opportunities.

Many Karen people in the Tanintharyi Region face challenges due to the decades old armed-conflict between the Myanmar Government and the Karen National Union. The resulting displacement has also had an impact on Karen Internally Displaced Peoples' access to education and skills development and their overall participation in the local economy. Many have migrated to Thailand and other countries where their safety and welfare is also not ensured.

The labour market survey revealed that basic personal skills, which are eminent for a well functioning labor market, are not present. According to the study, 11% consider themselves as being illiterate, only 2% have basic computer skills. The absence of personal motivation by especially young people is alarming. According to the survey results, 15% of interviewees had previously migrated to other countries (mainly Thailand) to seek better job opportunities. However, only 6% indicated that they have currently plans to leave the region to seek better job opportunities. Most of the people are confident that the economic situation of the region will improve in the short term.

Only 15% of the survey participants indicated that they had received some sort of short-term vocational training in the past, mostly provided by the private sector. Current TVET opportunities in the Tanintharyi Region remain limited, especially for Karen IDPs, as inherent barriers to participation exist.

Interviewed local business owners have expressed their desire to extend their business model, looking for skilled work-

ers to employ. Though there are many challenges ahead, most of them are confident, that the overall economical situation of the region will continue to improve during the next few years.

The demand for vocational training courses that are situated in the secondary or tertiary sector is high. Vocational training courses, such as masonry, carpentry, sewing and hospitality are in great need and should be supplemented by short-term trainings, such as English, computer courses and entrepreneurship. Such trainings will enable Karen people to become more- semi-skilled and skilled workers with higher incomes than unskilled workers and will enable them to participate in the growing local economy.

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2. Section One: Introduction

The primary purpose of this assessment is to provide adequate information on the characteristic of labor/skill supply and demand and its match or mismatch in the three townships of Dawei, Thayetchaung and Palaw, of the Tanintharyi Region in Myanmar, with a focus on Internally Displaced Karen People. Further to identify the demand of the labor market, which will help to clearly identify vocational training courses that will be provided at the Karen Vocational Training Center (KVTC), one component of the Enhance Livelihoods for Displaced People (ELDP) Project.

PROJECT BACKGROUND

Through repeated conflict-induced displacement, many local Karen people of the Tanintharyi Region have not been able to engage in stable agriculture and economic activities in the past, leading to severe poverty and food insecurity. A consortium was formed in 2016 to enhance livelihoods and improve food security for Internally Displaced People (IDPs) currently residing in 33 target villages in three townships in Tanintharyi region. The major Outcomes for the ELDP project are:

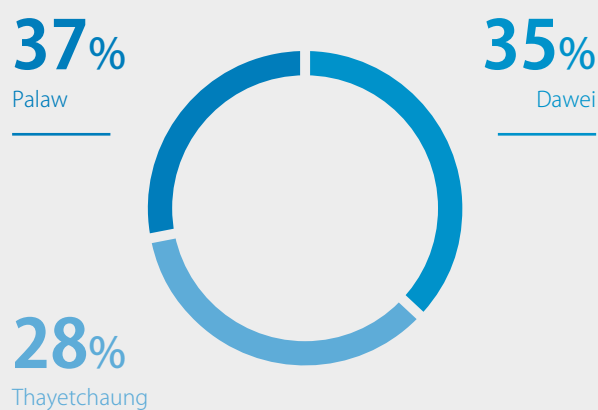
- 1) Vocational Training Centre (VTC) built, short courses developed and IDPs trained and able to access job market.
- 2) IDP HH obtain safe land access and tenure rights and able to utilize and manage local natural resources (community forests);
- 3) Increased resilience of IDP communities creation/strengthening of VDCs, VSLAs, etc. and linkages to public services;

This research study aims to provide adequate guidance and recommendations on questions related to the macro- and micro economic level, which may arise during the implementation of the Enhanced Livelihood for Displaced People (ELDP) Project funded by the Livelihood and Food Security Trust Fund (LIFT). Section 5 holds a list of recommendations that are referring directly to the management and implementation team in Dawei.

2.1 Methodology

The research process began with a desk research and review of valid secondary data. As there is only limited official data available on the labor market in Myanmar and especially for the Tanintharyi Region, a main part of this study relies on the 2014 National Census, the Myanmar Labour Force, Child Labour and school to work transition survey 2015, as well as data from the World Bank, the International Labour Organization (ILO) and the Asia Development Bank (ADB).

TOWNSHIP- PARTICIPANTS OF EACH TOWNSHIP (%)



For primary data collection, a team of enumerators was hired to conduct a survey using the simple random sampling method. Simultaneously, 17 Key Informant interviews (KII), at least five in each township, were held with local business owners, NGO workers and managing directors. A list of all KII can be found on page 21.

The **simple random sampling method** is a process in which each sampling household is selected one after another from a list of eligible sampling units. Ten out of the 33-targeted villages were randomly selected through a prototypical meth-

od. All names of each village were written on a piece of paper, then put into a bowl and randomly selected. After selecting the villages, the same procedure was done to pick 33 households (HH) from each of the 10 villages. In total, 344 HHS were taking part in the labor market survey. All interviewees were randomly selected and participated at their own free will. All data was collected anonymously.

List of selected Villages divided by Townships

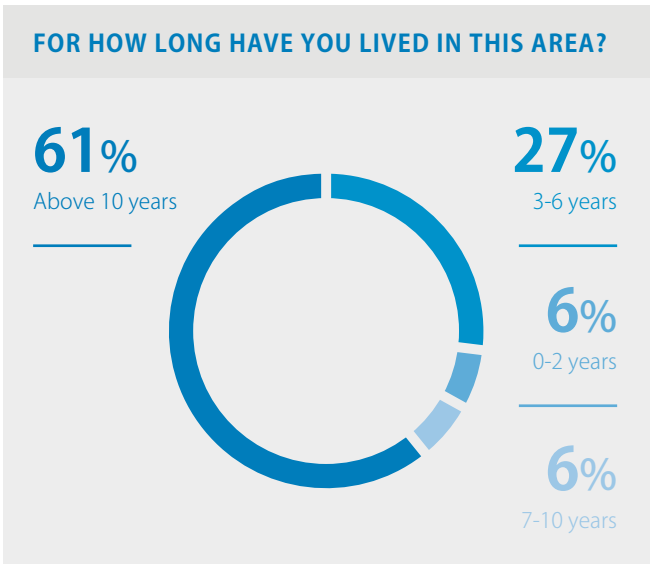
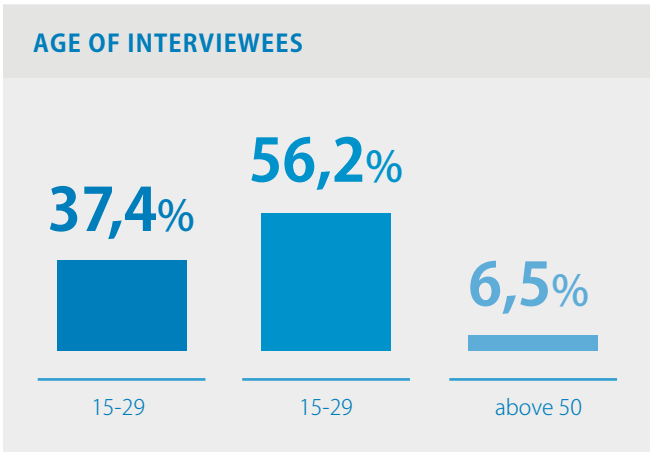
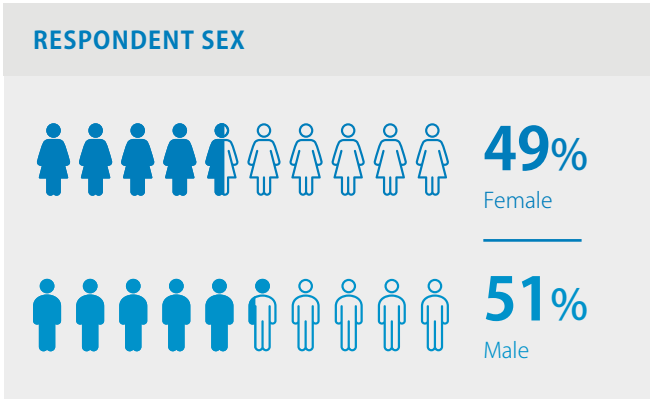
- › **Dawei Township:** Hnanpa Yoke, Kyeik Pee laung, Pyar Thar Chaung,
- › **Thayetchaung Township:** Byu, AitAit, Shwe U Chaung,
- › **Palaw Township:** Pyin Gyi, Thermal Pyin, Phaut, Durein Bin Shaung

Who participated in the survey?

- › Respondent Sex: 51% of the participants were male, while 49% were female.
- › The respondents age varied between ages starting from 15 up to 60 years. More then 37 percent are younger then 30 years, while more than 56,2 percent have reached an age of 30-50 years and above.
- › According to the definition of internal displaced persons (IDPs), all inhabits of these three townships with a Karen ethnic identity are considered to have been displaced in the past. However, data from the survey shows that the majority of the participants have lived in some areas for more then 10 years. 6% have recently moved to the area and 27% have lived in the area for about 3-6 years.

2.2 Tanintharyi Region

Located in the deep south of Myanmar, Tanintharyi Region is bounded by Mon State to the north, Thailand to the east and southeast, and the Andaman Sea to the west, where a long

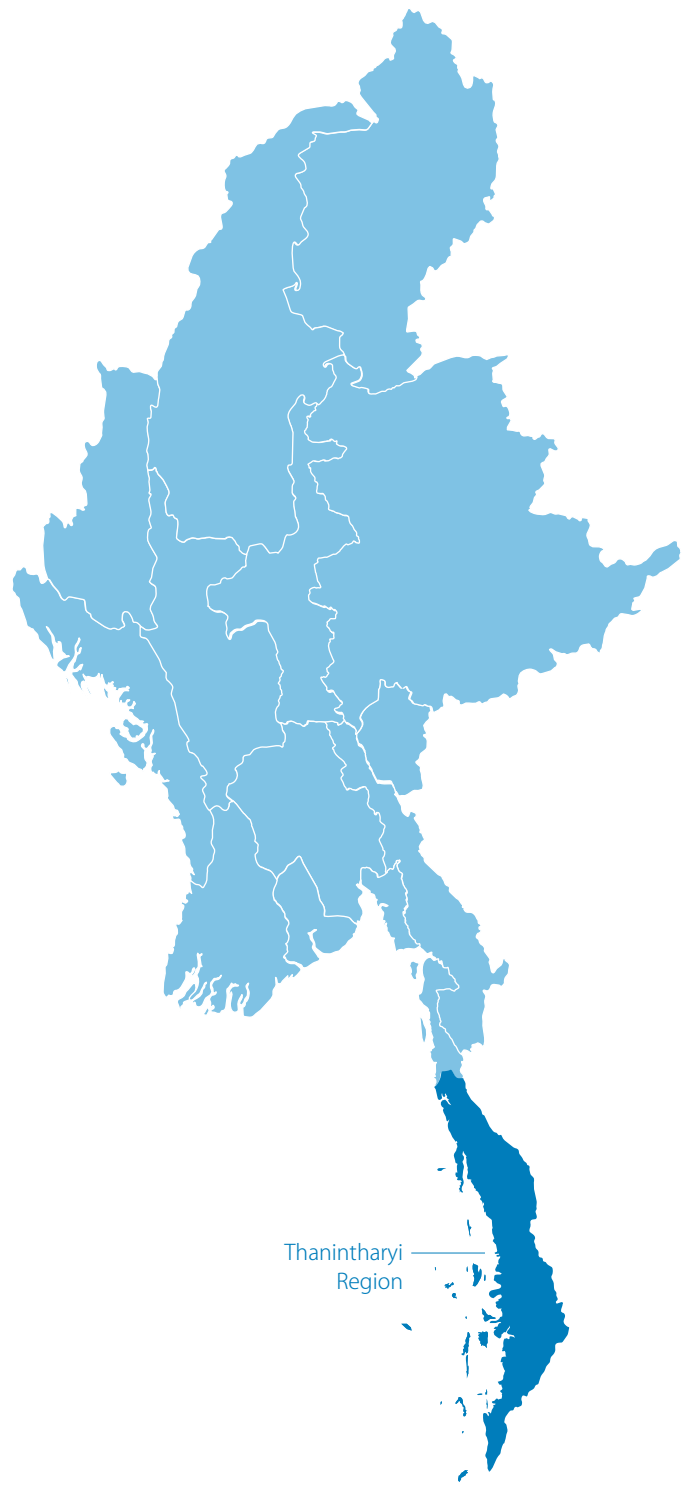


narrow coastal plain area runs in parallel to higher ridges and peaks. According to the Census Report 2014 the total population of Tanintharyi Region is around 1,408,401 persons. Of these, 700,619 are males and 707,782 are females. The predominantly rural region covers an area of 43,328 square kilometers, with only 24% of the population living in urban areas. The population density of the region is low with 32.5 persons per square kilometer, relative to the union average of 76 persons.¹

Tanintharyi Region has seen armed-conflict between the Myanmar Army and Ethnic Armed Organizations (EAO), such as the Karen National Union (KNU) and the New Mon State Party (NMSP) since 1948. Though of low intensity, the conflict has led to the displacement of thousands of Karen and Mon populations throughout the region, with some having fled to Thailand, while others remained internally displaced throughout the region. UNHCR estimates that there are currently 71,650 IDPs of Karen and Mon ethnicity living in Tanintharyi Region and around 6,000 refugees living in neighboring Thailand. IDPs can be found in all three-target townships: Dawei (5,600), Thayetchaung (4,100), Palaw (14,540).²

While the ceasefire between the GoUM and the KNU in 2012 has tremendously improved the situation for conflict-affected populations, new challenges such as contested land acquisitions and unsustainable and environmentally damaging resource extraction by private businesses have arisen in contested areas of the region. These challenges pose an imminent threat to communities' livelihoods and food security.

The relative absence of armed-conflict in the coastal areas of the region has allowed the agriculture, fisheries and natural resource industries to develop. Both rubber and palm oil plantations have been prominent employers, but have also been the cause of displacement, deforestation and land grabbing.



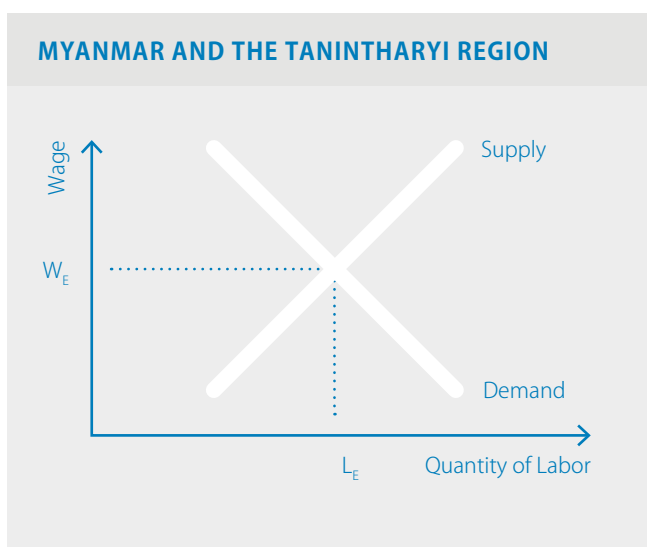
¹ Census Report Volume 3- F 2014 p. 1 ff.

² Tanintharyi Region Profile. UNHCR South-east Myanmar Information Management Unit, June 2014

2.3 Definition of a Labor Market

The labor market refers to the supply and demand for labor, in which workers provide the supply and employers the demand. At the macroeconomic level, the supply and demand are influenced by market dynamics, as well as migration the age of the population and education levels. Relevant measures include unemployment rates, average income, Gross domestic product (GDP) and productivity. At the microeconomic level, companies interact with workers, hire and fire them, set and pay salaries and take care of their working conditions.

The guiding paradigm for the analysis of labor markets in developed countries is the wage labor market. The typical employee is going to the same office or factory day after day and earns a salary that is payable each week or month.



In developing countries, steady wage employment of the type found in the developed countries is the exception, not the norm.

Labor markets in developing countries often show features that are different from those in developed economies. Some of them are:

- › The unemployment rate is lower compared to developed countries.
- › Earnings levels are very low despite long working hours.
- › Women are disadvantaged in developing countries labor markets.³

This survey focuses on the microeconomic level as well as the macroeconomic level. However, most of the secondary data was used for macro-economical interpretation while primarily data was used to understand the micro- economical situation of the region and in particular the labor market for IDPs.

2.4 Limitations

This study was conducted to identify the main drivers and trends in the labor market of the Tanintharyi Region, with a special focus on Karen IDPs. Due to the nature of social studies, the extent of the provided data identifying these trends and drivers lacks quantitative and qualitative certainty. However, the data was collected according to the international standardized and accepted empirical approach and thereof provides a temporarily valid inside of the demand and supply of the labor market as well as the economical drivers and trends of the target area.

3 Gary S. Fields (2013) p. 6



3. Section two: Economic Situation

This section provides the reader an initial understanding of the **economic conditions** in Myanmar and the Tanintharyi Region in particular. It identifies the comparative strengths and weaknesses of the local economy and the nature and form of economical challenges and opportunities that have an impact on the future development of the economic situation of the Region.

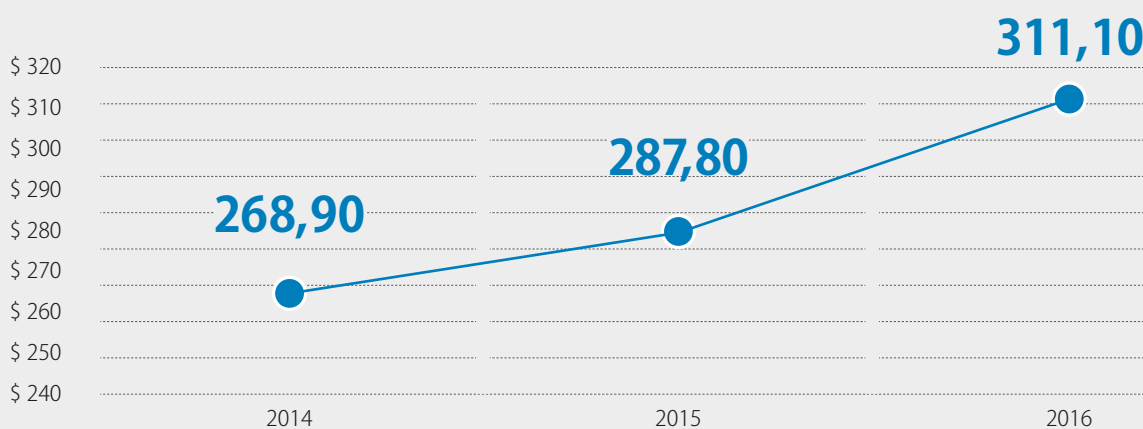
3.1. MYANMAR

Since the transition from a military to a quasi-civilian government in 2011, Myanmar has seen rapid economic growth, supplemented by an increasing demand for foreign investment. An increasing number of foreign companies have been entering into the economy, helping the overall economy to grow.

Due to the end of Western sanctions initiated by the reform process under the Thein Sein Government, foreign investment has grown from \$4.1 billion in 2013 to \$8.1 billion in 2014. Foreign direct investment slightly dropped in 2015, due to political uncertainties surrounding the 2015 elections and the overall unstable global economic. Foreign direct investment is however expected to hit \$7.0 in fiscal year 2016.⁴

The Gross Domestic Product (GDP) increased from 287.8 billion in 2015 to 311.1 billion in 2016, making Myanmar one of the fastest growing economies in the world with an annual growth rate of 8.1%. The energy sector, garment industry, information technology and food and beverages are among Myanmar's fastest growing economic sectors.⁵ Despite these developments, the living standards for the majority have not improved much. The United Nation points out that approximately 26% of the country's 51 million inhabitants are still living

MYANMAR-GDP-GROWTH \$



⁴ <http://www.mmbiztoday.com/articles/myanmar-set-easily-reach-7bn-foreign-investment-fiscal-year> (31.01.2017)

⁵ www.cia.gov/library/publications/the-world-fact-book/geos/bm.html (17.02.2017)

beneath the poverty line with no suitable access to education, health and economical participation.⁶

Economical Forecast

Analysts from the World Bank are confident that the Myanmar economy will sustain its rapid growth course. They project that the real GDP growth in Myanmar will rise to an average of 8,2% per year over the medium-term. The agriculture sector will slowly lose its importance, while investors from Myanmar and abroad demand for services and infrastructure construction.⁷

Over the medium to longer-term, the manufacturing and processing sectors continue to hold strong promise as potentially important drivers. The demands for skilled workers, who are able to work in the manufacturing and processing sector, will grow simultaneously.

Technical and Vocational Education and Training

The Government of Myanmar recognizes that skills development is critical in promoting inclusive growth and poverty reduction. A 2014 International Labour Organization (ILO) report on TVET identified the key growth sectors as manufacturing, infrastructure, agriculture, energy and mining, financial services and telecommunications in Myanmar.⁸

3.2. TANINTHARYI REGION

The economy of the Tanintharyi Region is primarily driven by agriculture, fishery, forestry, mining, and to some minor

Key Sectors of a growing economy:

Mobility: According to data from the Myanmar Government's Central Statistic Organization (CSO), the total number of registered motorcycles has increased in total to 11,091,383. (www.csostat.gov.mm/s6.5MA02.htm)

Communication: As of June 2015, Myanmar has a mobile phone penetration rate of 54.6%, up from less than 10% in 2012. A total of 29 million mobile phone subscribers were reported in 2015. Numbers increase rapidly as competition arises along providers and prices drop respectively. (www.mmtimes.com/index.php/opinion/16415-advancing-myanmar-s-telecom-infrastructure.html)

Electrical power supply: Myanmar's power generation capacity has for many years struggled to adequately meet the growth in demand. Slowly, investments are made to meet the increasing demand. As of 2011, 26% of Myanmar's population was connected to the national grid. A National Electrification Plan (NEP), targeting universal electricity by 2030, was implemented in 2015. (www.mmtimes.com/index.php/business/16556-world-bank-approves-400m-electrification-loan.html)

but growing extent tourism. The region is rich in natural resources, such as coal, tungsten, tin, iron and gas. Due to suitable weather conditions, rubber trees and oil palms are being grown in the region. Plenty of oil palms and rubber tree plantations can be found along the national highway. Back in 2000, the Government of the Union of Myanmar introduced a 30 years plan to promote 1.5 million acres of planted rubber. The bulk of rubber plantations are located in the Tanintharyi

6 <http://data.un.org/CountryProfile.aspx?crName=MYANMAR> (12.02.2017)

7 World Bank-<http://www.worldbank.org/en/country/myanmar>

8 ILO Asia-Pacific Working Paper Series (2014): Assessment study of technical and vocational education and training (TVET) in Myanmar. Kevin Woods (2015) p. 16

Division, with approximately 40,000-acre increase in rubber from 2009 to 2012.⁹

Exclusively for the Tanintharyi Region, the military government developed a plan in the late 1990s to increase the palm oil plantations to initially 500,000 acres, which was later increased to 700,00 acres of oil palms by 2030 in order to offset increasing home demand with local production. The government policy has been aimed at rapid expansion, imposing not only social, environmental and practical complications, but also the basis for an unsustainable and enduring poor performance of the industry.¹⁰

A total of nearly 360,000 acres of palm oil plantations have actually been planted by the end of 2013, covering now 18 percent of the land area of the Tanintharyi Region.¹¹ An overwhelming 1,90 million acres has been awarded to large conglomerates, with connections to the previous Military Government.

The recent price drop in 2015 on agriculture products had a deeply negative impact on the income of the region.

The development of rubber and palm oil plantations have not been without controversy, as they have been the cause of displacement, deforestation and land grabbing.

The sea fishing industry, arranged along the Tanintharyi coast, produces the main fishery products for the markets of Myanmar. According to the data for 2015 from the fisheries ministries, a fleet over 10,021 local inshore fishing vessels and 1214 offshore ships are operating along the coastline of the region.¹² Dried fish, prawn, shrimp and Ngapi (shrimp paste) are popularly derived from this region. The fishery exports from Tanintharyi, mostly to Thailand and Malaysia, were worth 144\$ million in 2014. The key production and marketing hub of ma-

rine capture fisheries in the Tanintharyi Region is focused on Myeik Township. Men are traditionally involved in fishing and wholesale trading, while women are engaged in processing and vending in local markets.¹³

The most recent poverty incidence estimate for Tanintharyi (33%) is higher than the national average of 26 percent. Especially for rural households the poverty incidence remains static at around 37 %.¹⁴

Socio-Economic Situation in conflict-affected regions

Plagued with decades of armed-conflict and government mismanagement, Karen populates areas of Tanintharyi Region have seen little investment in economic development and social services, leaving many populations struggling to make a living. While armed conflict has hindered development in general, the region has enormous economic potentials. These include, inter alia, tourism, trade and the development of substantial natural resources. Unfortunately however, much economic activity in these conflict-affected areas has focused on rather crude and often exploitative extraction of natural resources (e.g. logging and mining), often with negative social and environmental impacts. Thus the serious concerns which many ethnic stakeholders have, regarding increased economic activity and development initiatives, in the absence of effective regulatory frameworks or a political settlement to decades of armed conflict.

The limited and antiquated infrastructure has further limited livelihood opportunities, trade and access to social services. In fact, sealed roads can only be found in the coastal region, which is under the firm control of GoUM. Furthermore, physical infrastructure, including school buildings and rural health centers are limited across the region, but especially scarce in contested and EAOs' administered areas.

9 Kevin Woods (2015) p. 16

10 Fauna and Flora International (2016): Myanmar Oil Palm Plantations- A productivity & sustainability review, p.12-13.

11 Kevin Woods (2015), p. 16

12 <http://www.mmtimes.com/index.php/business/17797-windfall-for-tanintharyi-fishermen.html> (21.02.2017)

13 International Labour Organisation (2015): Value Chain analysis and competitiveness strategy: Marine Capture Fisheries, p.1.

14 Integrated Household Living Conditions Assessment (IHCLA), 2010.

Conflict and low-income opportunities have also resulted in large-scale labor migration to neighboring countries, especially Thailand. Remittances to Tanintharyi Region and other states in Southeast Myanmar continue to be a lifeline for communities strapped for cash and short of food throughout the region and contribute a high amount to the gross domestic product (GDP).

The majority of Karen populations in the Tanintharyi Region continue to be employed in the agriculture sector and many continue to rely on their livelihood through subsistence and smallholder agriculture. Most predominant crops include rice, rubber, betel nut, forest products and horticulture.

Economic Forecast

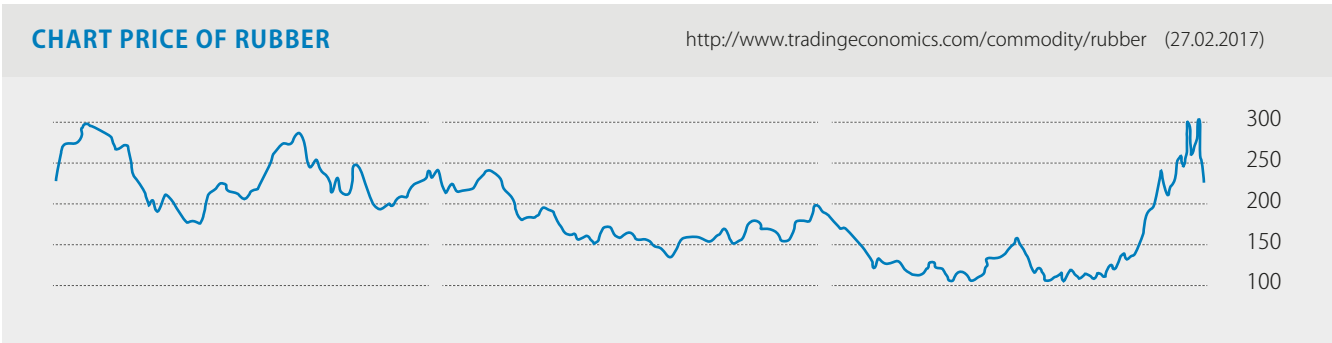
The following chart indicates the prices for palm oil and rubber throughout the last five years. Since the all-time high in 2012, the prices have declined, almost halved by end of 2015. As prices for agriculture goods are recovering from their heavy losses the income situation for local farmers and daily workers may improve continuously.

However, due to ongoing uncertainties of the global economy, the prices of agriculture products stay volatile.

The fishing industry in the region has made much improvement over the last years, raising the total amount of fisheries products continuously. The export increased from 40\$ million in 2004 to over 144\$ million in 2014.¹⁵ As new technology is introduced, the exports are most likely to continue its rapid growth path.

Large industrial projects, such as the high-profile Dawei deep seaport and Special Economic Zone (SEZ) development are likely to have a transformative impact on Tanintharyi's economy in the medium to long term. The demand of workers with skills that are inquired by the manufacturing and processing sector will grow continuously. The income situation will most likely improve over the next years, as well as the demand for service and goods that are related to the second and third economical sector.

15 <http://www.mmmtimes.com/index.php/business/17797-windfall-for-tanintharyi-fishermen.html> (21.02.2017)







4. Section three: Labor Market

One classical breakdown of the economical activities and the labor market distinguishes three sectors:

- › **Primary:** Involves the retrieval and production of raw materials. Such as corn, wood and Coal.
- › **Secondary:** Involves the transformation of raw or intermediate materials into goods.
- › **Tertiary:** Involves the supplying of services to consumers and businesses.

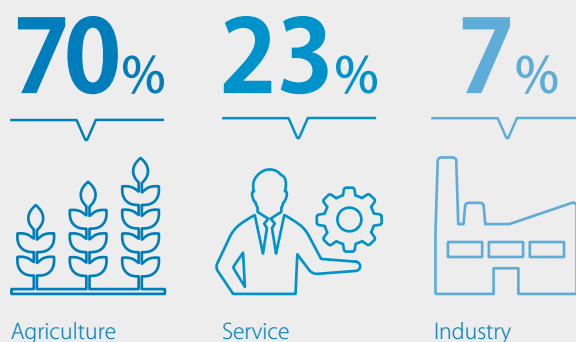
4.1 MYANMAR LABOR MARKET

Official Government issued figures show that nationwide about 21,96 Mio. people are participating in the labor market. 70% are working in the agriculture sector, while only 7% work in the industrial sector. 23% receive their income through the service sector. The unemployment rate is estimated to be between 1-4%.^{16 17}

At national level, the average monthly income is round about 134,490 Kyats (~100 USD) and the daily wage is about 4,760 Kyats (3,80 USD). Male receive a higher income than female, while the number of women participating at the labor market are relatively high. Around 50% of all Women of working age (18.380.805) are participating in the labor market.¹⁸

According to the 2014 Myanmar Census Report, 39% of the labor forces are employed by privately owned businesses, 44% (or around 9,7 million) are self-employed while 17 % were contributing family workers. About 616,000 people re-

LABOR FORCE BY OCCUPATION



ported to be under Public Administration and an estimated 390,000 were employed in Education sector.

Summary of Labour force statistics¹⁹

Key Sectors of a growing economy:

	Total	Male	Female
Working age population	33 934 662	15 553 856	18 380 805
Labor Force	21 959 797	12 474 495	9 485 302
Unemployment rate (%)	0,8	0,7	0,9
Average weekly working hours	51,55	52,74	49,97
Average daily wage (in ,000 Kyats)	4.76	5.32	3.99
Average monthly wage (in ,000 Kyats)	134.49	147.20	119.04

¹⁶ Ministry of Labour, Employment and Social Security and Central Statistic Organization; (2016)

¹⁷ Unemployment rate, as defined by ILO, only takes into account people aged 15-64 years who are not working but are actively looking for job.

¹⁸ Ministry of Labour, Employment and Social Security and Central Statistic Organization; (2016)

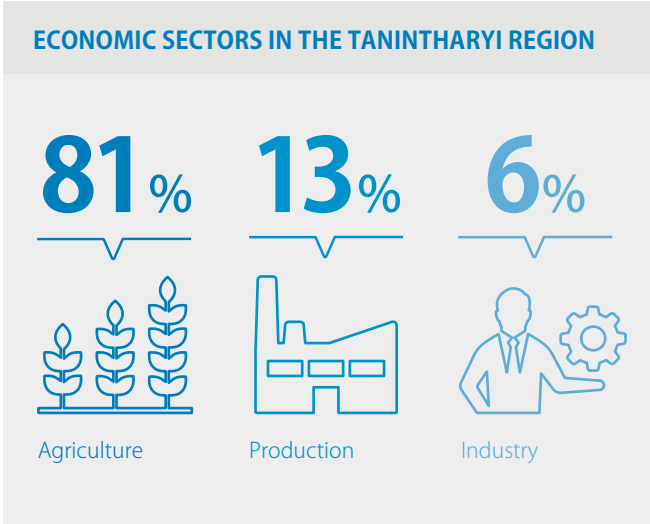
¹⁹ ibidem.

While Myanmar’s large youth population is a major strength, the country suffers from a number of key deficits in its labor market structure. Not only is a large share of workers under-employed and hence not able to contribute their full energy to economic output, but the workforce is relatively under-educated and low-skilled.

The most binding constraint on widening access to TVET and higher education is the rather low middle school and high school completion rate. At most only 25% finish high school. While the Ministry of Science and Technology recently reintroduced government technical high schools nationwide, public sector TVET provision in Myanmar remains largely focused on advanced, multiyear diploma programs targeted at high school graduates, effectively excluding the majority of young people. Meanwhile, private training is expanding but remains limited and targeted at more affluent urban niche markets and skill areas (for example, computer and language training). In summery, it can be suggested that TVET in Myanmar does currently not provide an effective alternative to higher education for the broader population, and access to TVET appears to be particularly limited for poor, rural and ethnic populations. Action is needed urgently to expand TVET access for youths and unskilled laborers (particularly those from disadvantaged groups, including ethnic groups) and to target the foundational skills necessary to drive growth.²⁰

4.2 TANINTHARYI LABOR MARKET

According to the results of the survey, the main sources of income for Karen IDPs in the three target townships of the Tanintharyi Region are from the primary sector. More than 81% of the interviewed workforce is employed in the primary sector, most of them in the farming sector. Only 6% of the interviewed labor force is working in the secondary sector.



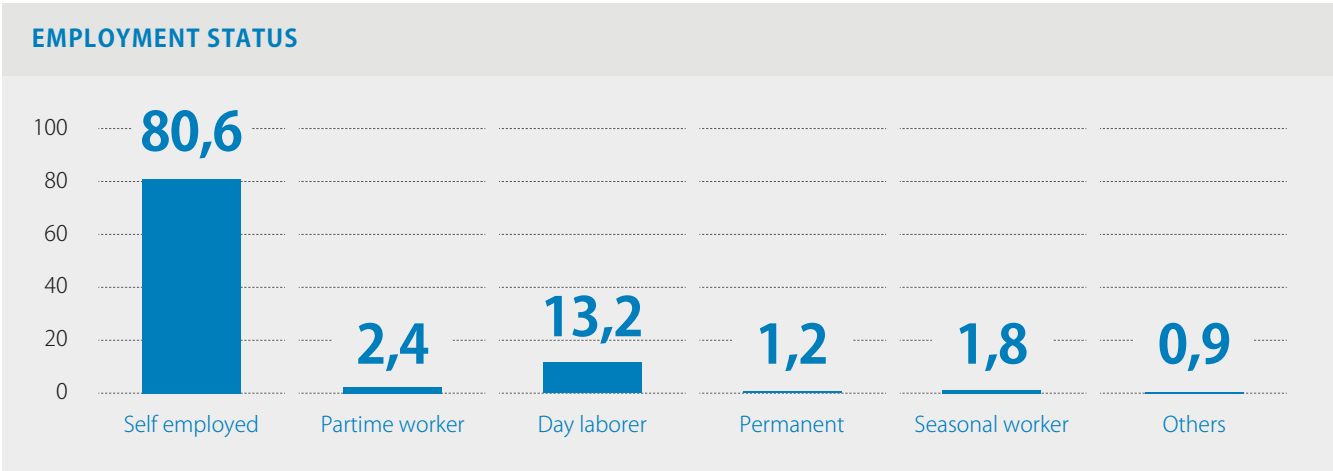
Of these employed in the secondary sector, most labor for construction companies followed by local bakeries and tailor/ sewer shops. Around 13% are engaged in work that is related to the tertiary sector. They are employed by the government or privately owned businesses as driver, teacher and nurse. Some work in the private sector as hairdresser or in beauty salons.

Around 64,2 % of the entire working age population in the Tanintharyi Region is participating in the local labor market.²¹ 80% of the work forces in the region are self-employed. Only 1,2% are permanently employed, while 13,2 percentage are employed on a day-to-day basis.

By comparing the data collected through the survey with the official numbers from the government and the Census of 2014, it is clearly shown that the regional emphasis on the agriculture sectore is still existing. Most of the work force is working in the primarily sector, respectively in the farming and fishing industries. The amount of people who are self employed is quite

20 ADB Economic Working Papers (2015): Myanmar Human Capital development, Emploment, and Labour Markets, p.28.

21 (The 2014 Myanmar Population and Housing Census; Census Report Volume 3-F; Tanintharyi Region Report)



high and fits perfectly the above definition of an undeveloped labor market. Only a few employees have a permanent employment status, thus receive regular income.

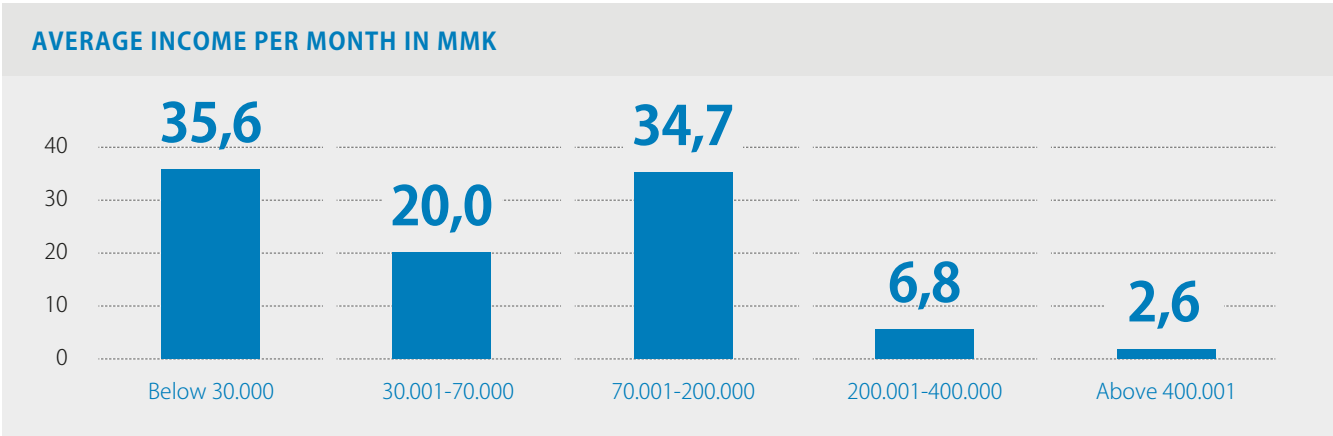
Income situation

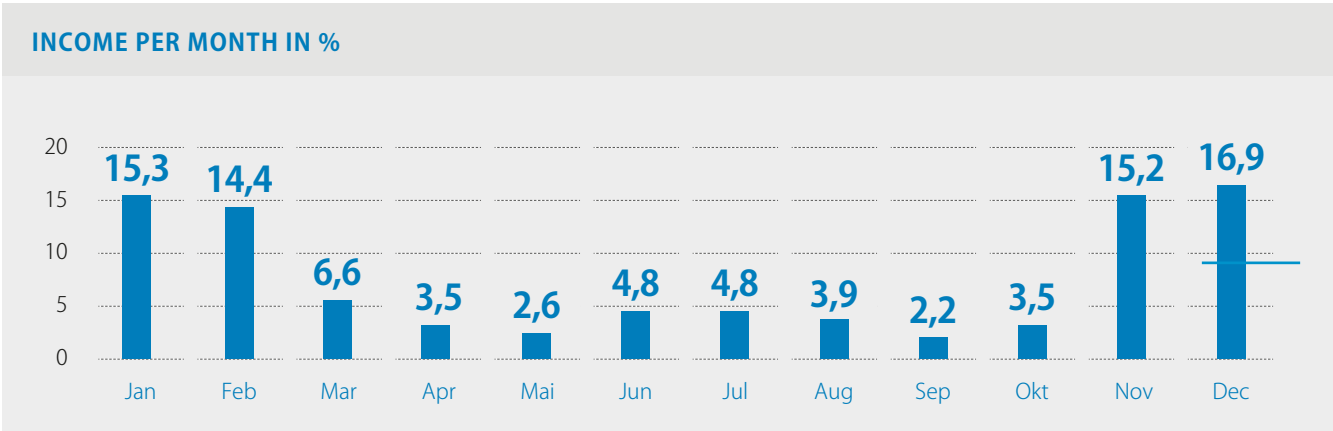
The United Nations (UN) defines poverty in absolute terms. It defines extreme poverty as living on less than \$1.25 per day, and moderate poverty as less than \$2 a day.²² The following chart shows the average monthly income for interviewed

22 <http://www.un.org/millenniumgoals/poverty.shtml>

IDPs in the Tanintharyi region. More then 35% are living according to the definition of the UN in extreme poverty, as they have less then \$1.25 US-Dollar available for daily consumption. 20 percent have an average daily income above \$1.25 US-Dollar but below \$2.0 USD. They can be considered as moderate poor.

More then 50% of the working force has a daily income that is below the United Nations defined poverty line, while only 10% have an income above five US-Dollar per day. 2,6% receive a relatively high income, they have a monthly income that is above 400.000 MMKs. The overall average monthly income lies about 136,800 Kyats (about 110 USD).



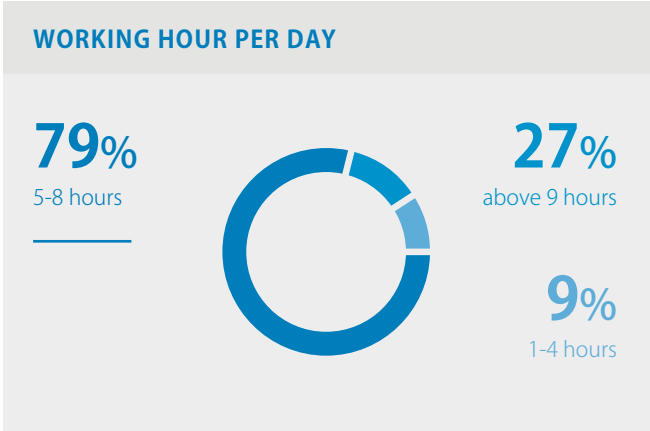


Taking into account, that most of the labor force works in the agriculture sector, it is not much of a surprise to see that the monthly salaries varies tremendously. During harvest time, November- March, the demand for work is high while less work is available during the lean season starting from April to October each year.

The average daily wage for unskilled labor is only between 3.000 to 5.000 MMK per day throughout Southeast Myanmar whereas in Thailand, unskilled workers can earn 10,000 ore more per day.²³ As a result, many jobs, especially in the construction and hospitality sector, are filled with persons from other parts of the country, such as the Central Dry Zone or the Ayeyardwaddy Delta. In Myanmar, labor dynamics shifts East. Populations from the west and center of the country tend to move to urban centres and east to the border areas, while inhabitants from the Southeast tend to migrate further east into Thailand.²⁴

Most of the work force works about 8 hours a day, while 12% work for more then 8 hours and 9% work daily less then 5 hours.

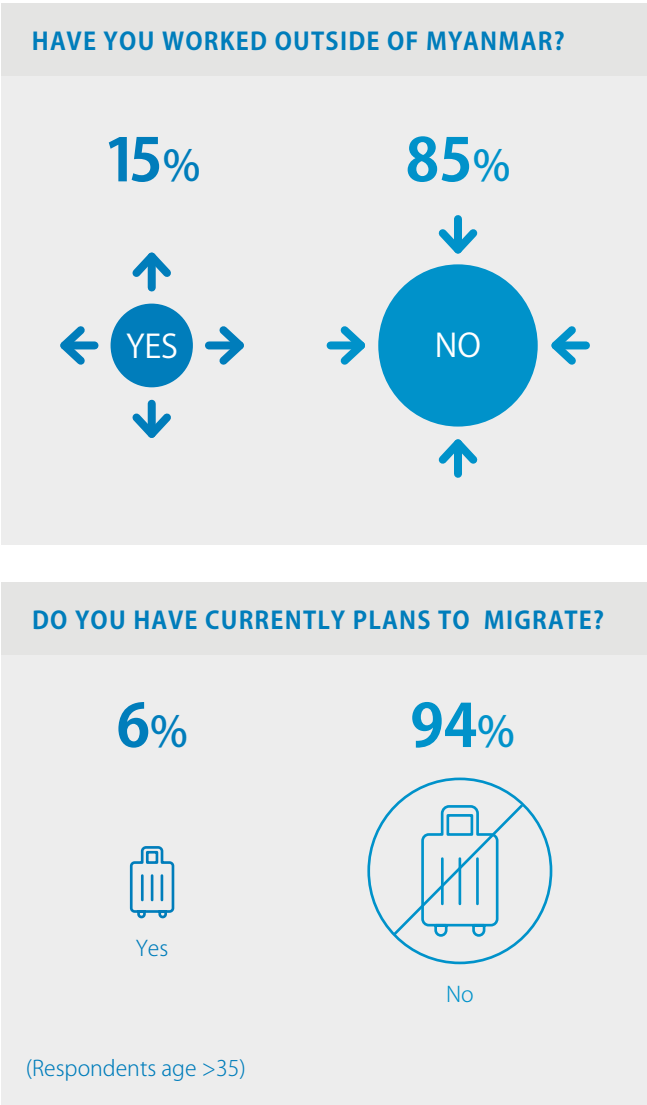
23 <http://www.un.org/millenniumgoals/poverty.shtml>
24 Finnish Refugee Council (2016): Labour Market Survey- Kayah and Tanintharyi Region, p.11.



Migration and its impact to the Tanintharyi Region

Depending on the nature of migration, migration may have a positive as well as a negative effect on the labor market.

Due to the low-intensity conflict between the Myanmar Army and EAOs, many ethnic people from the Tanintharyi Region have a long history of migrating into Thailand. Especially young people, intent to leave the region looking for more security, better job opportunities and higher salaries. Since the official ceasefire in 2012, more and more migrants return to their native, bringing much experience and savings along. Some of them have become entrepreneurs or become valu-



able workers in the region. However, many of them left the region after a short period of time for better job opportunities within Myanmar, mostly in urban areas such as Yangon or Mandalay. Lately, migrants from the northern part of Myanmar have moved down to the Tanintharyi Region, looking for better jobs and higher income in the agricultural, fishing and mining sectors. Most of them are unskilled workers, willing to work for less than the native workers.

According to the survey, 15% of the participants have moved outside the country, while 85% have not lived and worked abroad. The main reasons for people to leave their native were poverty and better job opportunities.

Only 6% have currently plans to leave their home, while 94% have no plans to do so.

This relatively small number of potential migrants may be an indicator for an expected positive economical growth. It might be even clearer if only the younger working age group is taken into account. In general, young people have more intentions to leave their hometown, looking for better jobs, higher salaries and better opportunities. By looking at this specific age group (below 35), even less people have currently plans to leave the region.

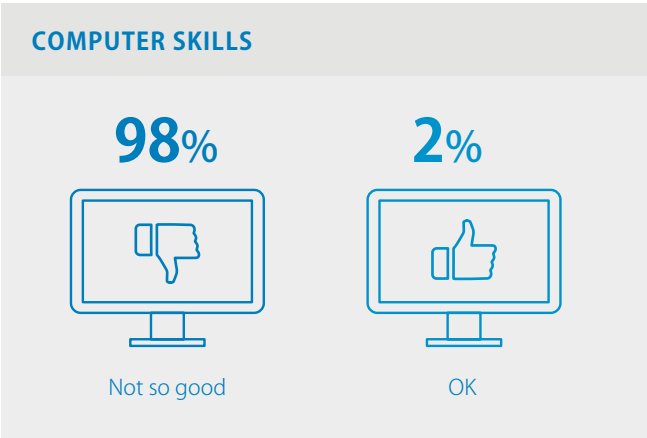
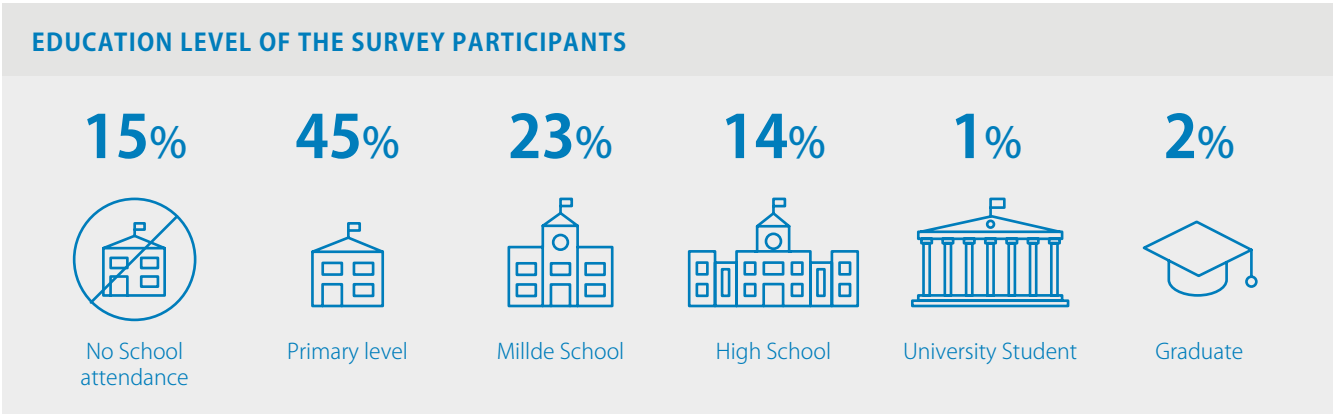
What underlines this finding is that almost all business owners and managing directors that were taking part in the key informant interviews are expecting economical growth, more jobs and income opportunities from a medium to long term perspective.

4.2.1 SKILL SUPPLY

Another part of the survey was focusing on the personal skills and how they are distinct throughout the region. Education is one major aspect of the personal qualification and one of the main drivers in personal and economical development. As the local economy is making progress, transforming from an agricultural to a producing or even service orientated economy, more people with higher educational degrees and specific vocational skills are needed.

According to the collected data, about 15% of all participants have not received any education, 45% attended primary school before entering the labor market. 23% were able to finish middle school, while 14% graduated from High school and only 2% have received an university degree.





- › Primary Level -1st to 5th grade;
- › Middle School – 6th -9th grade;
- › High School- 10th to 11th grade;

About 12% have received vocational training, while 88% had on the job training.

Only 2% of the working forces consider themselves to be able to work with a computer.

98% have never worked with one or don't feel that they are able to use a computer in a proper way.

59% of the work force in the region consider themselves to be able to read and write in a proper way, while 30% feel that

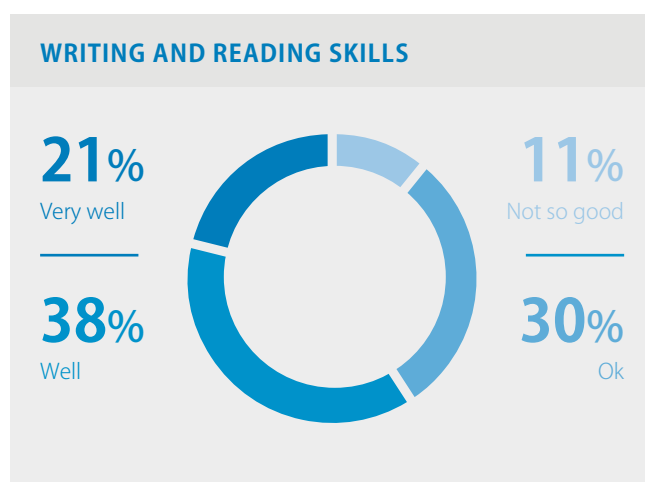
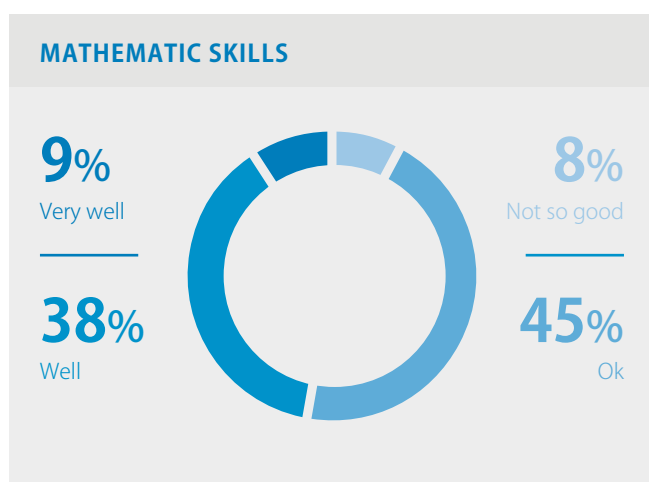
they are only having skills in writing and reading that they consider as being „ok“. 11% may be considered as illiterate. The mathematic skill level is similar to the ability to write and read. About 47% see themselves as able to add and subtract numbers in a proper way, while 45% are less sure about their mathematic skills and 8% consider themselves even as unable to use basic mathematic skills.

Participation of Women in the labor market

Karen women in all three townships of the Tanintharyi Region are more involved in livestock businesses (around 17%) than men, but less in farming (about 57%). 9% are in the trading business, operating small retail stores, while 5% are working as teachers. The number of women that has received vocational training is slightly higher than men. While 15% of all females have received training, only 10% of the men attended a vocational training course.

On average, women in the region are facing a lower income situation than men do. However, the percentage of women that receives an income, which can be defined as a “middle-class income” is higher.²⁵

²⁵ The term “middle-class income” is used and defined by the author to distinguish an income group from others. (Middle-class: above 70,000 MMK and below 200,000 MMK monthly income)



The table below might be an indication for the benefit of vocational training for women. Women, who received vocational training, have a bigger possibility to have a higher income than women without a vocational training.

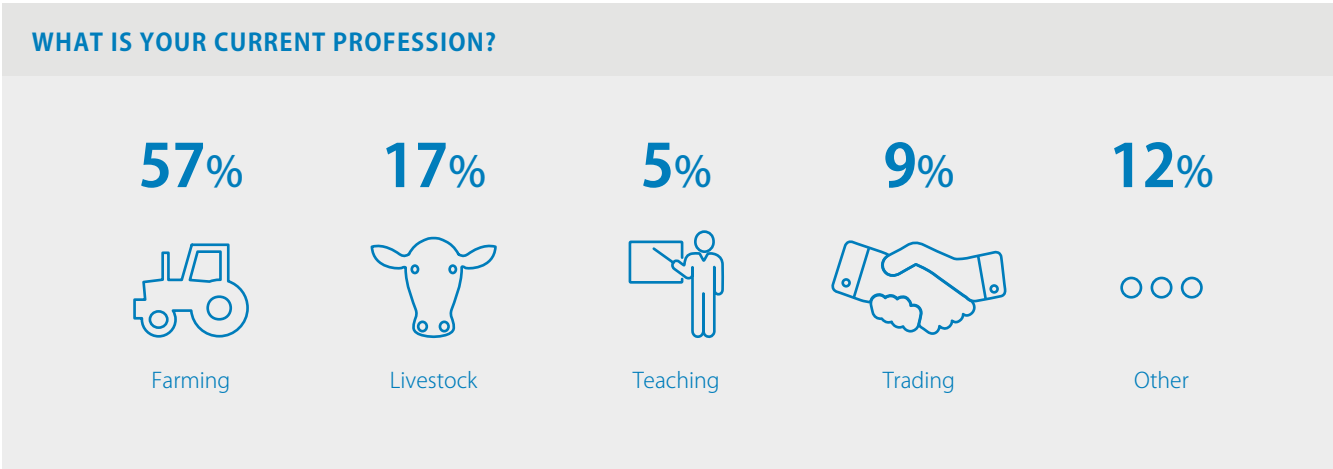
Business owners that were taking part in the key informant interviews were mostly male. However, one woman is running her own tailor shop and gives training to young women. Another woman is operating a hair-dress and beauty salon, while a third woman is managing a bakery. All of these businesses are related to the tertiary sector, providing services to customers and other businesses.

Vocational Training

To further identify potential vocational training courses for the Karen Vocational Training Center (KVTC), the 344 participants of this survey were asked what kind of vocational training they would like to attend.

- › Around 20% would like to attend a vocational training that is related to catering services like cooking and baking.
- › 18% showed interest in vocational training that is related to sustainable agriculture. As many people rely on income from the agriculture sector, it is quite understand-

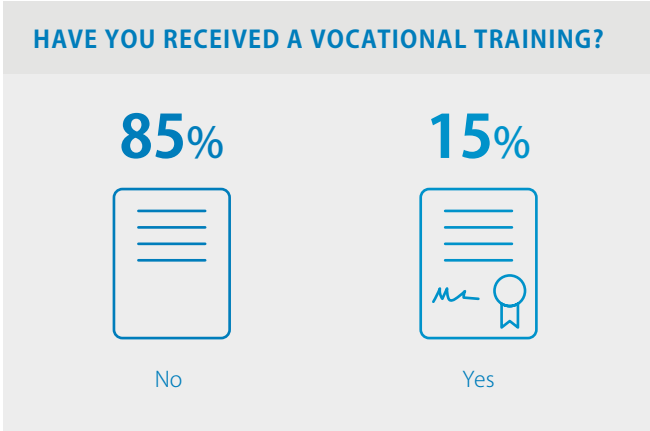
		Have you received a Vocational training?		Total
		YES	NO	
Average Income per month	Below 30,000 Kyats	5	56	61
	30,001-70,000 Kyats	4	29	33
	70,001-200,000 Kyats	14	45	59
	200,001-400,000 Kyats	1	10	11
	Above 400,000 Kyats	1	3	4
Total		25	143	168



- able that most of them would like to attend a workshop covering these topics.
- › About 14% looking for training that offers sewing.
 - › 12% like to attend a mechanic course.
 - › And about 6% would like to see carpentry as one training that will be offered at the KVTC.

TVET Providers in the Tanitharyi Region

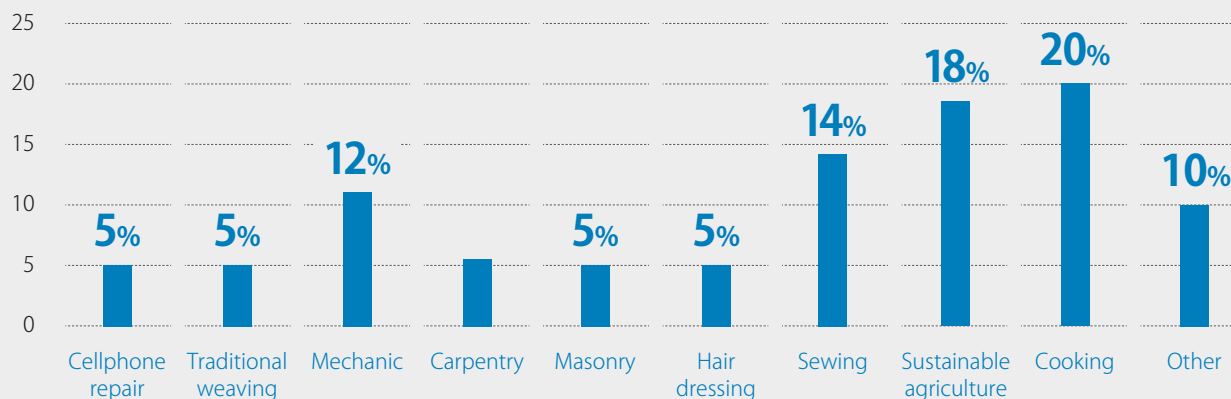
Next to private companies, which supply vocational training on the job, a total of four TVET providers were identified in Dawei. Three of them are government institutions and one is a private institution. Providers from the government, include the Department of Rural Development (DRD), The Ministry of Border Affairs (Na Ta La), the Government Technical Highschool (GTHS) and the Dawei Technical University. In addition, the Norwegian Refugee Council (NRC) is providing short courses in the sewing, motorbike repair, life skills and small business. While NRC specifically targets IDPs, government TVET facilities, e.g. Government Technical High school (GTHS), remain out of reach for most IDPs and are not designed according to the special needs of displaced populations. Inherent barriers to participation, particular for young Karen from KNU controlled areas exists. These in-



clude language barriers, logistical challenges and trust and confidence towards government institutions.

The fast changing socio-economic environment in the Tanintharyi Region, e.g. development of the Dawei Special Economic Zone, increased connectivity through road constructions and the development of the tourism sector, etc. will most likely provide new income opportunities to local populations. In order to participate in these opportunities, there is an urgent need for Karen IDPs to receive vocational training skills and link them to the private sector.

WHAT KIND OF VOCATIONAL TRAINING WOULD YOU LIKE TO ATTEND?



4.2.2 DEMAND SIDE OF THE LABOR MARKET

The Labor market survey was conducted to get a better understanding of the composition of the labor market. While the quantitative survey was focusing on the workforce and supply side of the labor market, relevant interviews with key persons, namely business owners and managing directors, were conducted throughout the region.

Seventeen key interviews in three townships (Dawei, Palaw, Thayetchaung) were arranged to get a better understanding of the **demand side of the labor market**.

Key findings from the demand side:

- › There are not many skilled workers in the region. Most of the workers are getting trained on the job.
- › Some companies have adapted training/vocational courses to their business model. Young people have to pay a training fee to get a one to three month long on the job-training course.
- › Salary is paid along the amount of experience the worker gained. The more experience, the higher the salary.

- › Workers that have attended vocational training courses or have received an official certification from the government, usually receive a higher salary than others.
- › Workers with vocational training skills are most likely to become entrepreneurs themselves.
- › Most of the employees are employed on a day-to-day basis but still have worked for the same company for many years.
- › New workers/ employees are often recruited from family members or from the same villages.
- › A rapid economic development of the region is expected by most of the business owners and managing directors. As foreign and domestic investors are investing in the re-

‘(···) I have two trainees. Once they finished the training they will go back to their villages and start their own business.’

Naw Lah Eh
Owner of a tailor shop

‘(…) If the employee has no experience, I pay him 75000 kyats per month. (…) If the employee is a skilled worker, then the salary is 210.000 per month. (…)’

Yang Naing Aung
Owner of a motorcycle repair

gion on various sectors, more infrastructure projects will be planned and implemented.

- › Some of the interviewees are expecting that the tourism sector will increase in the next years. More people will come to visit the region.
- › More hotels, restaurants and other to tourism related attractions will be build and opened. Due to this development, more jobs will be available in the tourism sector.
- › The Special Economic Zone (SEZ) is one major driver of the region. Even though there has been not much movement in this direction lately, the interviewees agree that once the SEZ is implemented, the economic situation will improve rapidly.
- › More construction work, more tourism, more demand on rendition of service (restaurants, hair dresser, accommodation, etc.) is expected.

During the interviews, the business owners were asked to name the main economic challenges for their business and the region.

Lack of Electrical Infrastructure

One of the main challenges for business owners is the low electrification rate. In fact, Tanintharyi Region has one of the lowest electrification rates in Myanmar. On the 2014 Census

‘(…) The Tanintharyi region has nature resources unlike other regions. That is why the tourism sector will grow in the future. (…)’

Aung Soe Oo
Hotel Manager in Dawei

only 8% of households in the Tanintharyi Region cited on-grid electricity as their primary source of lighting²⁶ Most of the businesses have their own electrical generators to secure a stable power supply. The privately owned Dawei Development Public Co. Ltd. provides electricity to Dawei, by operating a power plant that runs on diesel fuel, at a very high cost. The government provided electricity on the national grid in Yangon is available for 35- 50 MMk (0.03 to 0.04 USD) while the privately owned electricity provider in Dawei charges 300-600 MMK (0.3 to 0.5 USD) per unit.²⁷ Companies, pro-

²⁶ Census 2014

²⁷ Bart Robert (2016) p. 12

‘I started this company from my personal savings. (…) I do not have enough money to extend my company. (…) I have never got a credit from the bank before.’

One Man
Owner of a Trading company

viding services to customers, such as hotels, tailors and hair-dressers suffer from these circumstances.

Lack of a well functional financial market

One of the main drivers to a developed economy is a well functioning financial market. Companies need to invest, advance in new technology, buy machinery, resources and have

to hire new employees. All of that is almost impossible if the financial market is not providing sufficient loans and credits. Most of the business owners are solely depending on their and their family's savings. The so-called "money lenders", mostly women, are providing small loans to others, charging an interest rate as high as 12% per month. Financial Institutions like banks and credit institutions are only located in urban centers in the region.

Key Information Interviews

NAME	TITEL	ORGANISATION	LOCATION	# of employees	Date
Aung Soe	Managing Director	Hotel Zayar-Htet San	Dawei	50	26.10.2016
Min Lat	Business Owner	Mobile repair Shop	Dawei	15	26.10.2016
Naw Lah Eh	Business Owner	Sewing Company	Dawei	3	25.10.2016
One Man	Owner	Trading company	Dawei	4	25.10.2016
Renahtoo	Business Owner	Hair-dress and beauty salon	Dawei	3	26.10.2016
Saw yo Say	Business Owner	Motorcycle repair shop	Dawei	1	25.10.2016
Thet Paing Tun	Managing Director	Construction company	Dawei	25	25.10.2016
Yang Naing Aung	Owner	Motorcycle repair shop	Dawei	5	26.10.2016
Zaw Min	Managing Director	Construction Company	Thayechaung	N.A	26.10.2016
Saw Nay Ta Moo	Owner	Motorcycle repair and wash company	Thayechaung	13	12.12.2016
U Saw Win	Business Owner	Construction, Concrete wall/ Dig well company	Palaw	43	13.12.2016
Zayar Soe	Business Owner	Motorcycle repair shop	Thayechaung		12.12.2016
Myat Su Mon	Manager	Bakery	Thayechaung	40	12.12.2016
San Lwin	Owner	Betel Nut trading	Palaw	6	13.12.2016
U Ngwe Lwin	Owner	Brick	Thayechaung	100	12.12.2016
Daw Tun Shin	Owner	Fish trading	Palaw	2	13.12.2016
U Kyi Ho	Owner	Selling Building and construction materials, gas station,	Palaw	40	13.12.2016
Ko La Htay	Business Owner	Cement brick, wall for well, different design of brick, concrete tube	Palaw	8	13.12.2016

Lack of personal motivation of young workers

It is widely known, that the most important assets of a company are their human resources. While business owners have to manage a company, its employees do the actual work. Most of the business owners were mentioning, that especially young people lack of personal motivation. Young people don't show up for work but enjoying free time with their friends. Some mentioned that they barely find people who they can trust and that these circumstances are limiting their ability to extend their business model.





5. Section five: Key Recommendations and Conclusion

After taking into account local labor market dynamics, macro-economic trends and the demand, the survey has identified a number of suitable Vocational training courses for the KVTC. These courses are listed below as well as some verifiable reasons for their selection. Additional to the findings in this study, other labor market surveys carried out in other regions result in a similar list of necessary skills on an emerging labor market.

› **Mechanic and Motorcycle repair** - the number of motorcycles and cars is growing rapidly and therefore the demand for labor in this sector. The overall mobility of the people is increasing and will increase over the next years as cheap motorcycles from China and Thailand will be more affordable by an increasing number of people, including IDPs. Many of the target villages of the ELDP project are located at the main road between Dawei and Myeik which means that transportation means will gain priority among villagers.

› **Masonry** - As the government is investing in infrastructure projects and privately owned business in buildings, skilled workers in masonry are in high demand. Many Companies

have moved to the region, looking for skilled workers. It can be expected that skilled masonry workers have not only a higher chance for employment but also for higher salaries.

‘(···) I would like to hire skilled labor, who has gained experiences in this business. (···)’

Renah too
Owner of a Hair dress and beauty salon

› **Carpentry** - Skilled workers in carpentry and wood working skills are in demand. Construction companies are looking for workers with this particular skill. The region will most likely experience more construction work, the demand for skilled worker will grow as local and regional development picks up speed

› **Hospitality** - The hotel and Tourism sector is most likely to expand. Hospitality will be in high demand. To work in this sector, a certification can be seen as highly valuable on the emerging job market.

› **Hairdressing and Beauty Salon** - A skilled hair cutter designer is in demand. Young people have good knowledge of urban hairstyles, and generally cut and color their hair like the youth in Yangon. Basic knowledge on facial makeup and nail paints are also associated with the skills in a beauty salon. The market demand for this skill is increasing also in more rural areas and it can be expected that people with this skill are likely to find employment or start an own business.

‘(···) There is a high possibility of young people getting construction jobs, because we have a shortage of skilled local worker. Now, we are recruiting the workers from other states and regions. (···)’

Thet Paing Tun
Owner of a Construction company

- › **Sewing** - is in high demand throughout the country and job opportunities are expected to grow rapidly. Employees who have been well trained and who hold certificates are particularly in demand in urban areas. There is potential for export related growth as new garment factories open around the country. Even on the local level, sewing skills are very valuable as tailoring traditional dresses is apart from mass-manufacturing western style products for export.
- › **Cooking and Baking** - With the expected growth in tourism, it is anticipated that this will be a growth sector, demanding more skilled worker. Cooking and Baking skills are also valuable at local and household level where the demand for baking products will increase even in more rural areas. Also the number of smaller family-run restaurants will increase and quality cooking (health/food security) is essential in this context.

The recommended short term TVET courses identified through this labor market survey are also in line with recommended TVET sectors and programmes of other stakeholders working in the TVET sector such as ADRA Myanmar, the Finnish Refugee Council, ACTED, and World Vision.²⁹

In this context cooperations with Government Technical Highschools (GTHS) and the introduction of affordable short VT courses may attract a larger number of especially young people (early school leavers) to increase their skills. Those who may have left school early (after grade 9 or earlier) may see a chance to increase their skill level and improve livelihood opportunities.

In this context however it will be crucial to offer hands-on practice oriented skill building opportunities. A too ridged academ-

ic orientation and theoretical training as it is currently applied in GTHS is probably not meeting the needs of the people nor the labour market.

Recommended Workshops or short-term courses

Basic Computer Skills - While during our survey a number of businesses indicated that basic computer skills were in demand, there was almost no basic knowledge by potential employers. Basic Computer skills are rapidly gaining more importance in nearly all the assessed sectors. Therefore, there is an increasing demand to learn these skills and increase labor market value for trained people.

Language Skills - As more and more foreigners will work, travel or visit Myanmar, English is the common language to communicate. To work in the tourism sector, English is required and should therefore be provided as a subsidiary course. Business success either running restaurants, hotels or shops will largely be influenced by the capacity to communicate in other than mother tongue language. Despite the fact that basic English language skills are relatively well developed compare to Thailand, there is the need to offer tailored short courses for out-of school people, mainly young adults. Foreign language skills will also determine whether a 'migration' experience will be successful.

Accounting/numerical understanding - there is a scarcity of skilled accountants. As more and more companies are founded or settled in the area, the need for accountant will increase. Accountants are needed in all sorts of businesses and sectors.

Recommendation on the macro-economical level

The lack of sufficient power supply is one of the main reasons why the development of the Tanintharyi Region sticks

29 ADRA Myanmar (2016): Consolidated Report on INGO Labour Market Assessment and TVET Delivery in South East of Myanmar, p. 16

behind the overall strong economic growth of the country. The Government should pay more attention to the development of sufficient power supplies, allowing companies to function and produce in a more competitive way. To say it clearly, the unstable power supply flanked by the high price for electricity, makes it almost impossible for companies to move production plants into the area.

A financial market is essential for a well-functioning economy. Companies and private Households must have access to the financial market and funds locally. Financial institutions should be encouraged to enter the market, secured by the government.

Conclusion

The collected data shows clearly that the labor market of the Tanintharyi Region can be considered as underdeveloped. Most of the people are employed in the primary sector, respectively in the farming or fishing industry and are bound to a precarious day- to day employment status. The survey found that the unemployment rate is relatively low taken into account that official statistics do not exist. The income situation for the majority of the working forces however is often beneath the poverty line. Women have in general a significant lower income, even though more women work in the secondary and tertiary sector.

The personal skill level was found to be quite low among the interviewees, as only a few people have participated in vocational training. Almost none of the interviewees had computer skills and a high number of people are unable to read and write in a proper way which significantly influences employability, livelihood activities and consequently food security.

The demand for skilled workers in various sectors are constantly increasing, as the economy will be moving slowly

from an primarily agriculture based to a more production and service orientated economy.

The planned but currently put on hold SEZ in Dawei might bring a significant boost to the local economy once it is realized. It can be expected that this will further increase the demand for skilled workers not only from the region but even beyond. More business opportunities will arise as more companies enter the market, increasing the demand for skilled workers and improve income situations. The timeline for this mega project is not clear and therefore, the local economy will grow on a slower pace. In this context, tourism and its associated service sectors might become a driver for the regional economic growth.

The installation of the Karen Vocational Training Center, offering some of the recommended training courses can be expected to contribute to meet the demands of the future labor market as well as offering self-employment opportunities through the skills trainees can develop. In addition to the identified vocational training courses, short-term courses such as computer skills, accounting and English should be offered at the KVTC. Such additional skill building opportunities offered can be seen as useful triggers to reinforce the center relevance as a locally established training center.

The research study indicates that the benefits of vocational training courses are eminent for the Tanintharyi region.

The author of this study is convinced that the KVTC once it is established has the potential to become a valuable skill-building institution in the region with positive influences to the development in rural and semi-rural areas.



Dawei Office: Training session for the enumerators



List of Literature

- › Census report Volume 3-F; Tanintharyi Region 2014, Myanmar Population and Housing Census; Department of immigration and Population, May 2015
- › Labour Market Survey- Kayah State and Thanintharyi Region; Bart Robertson; Myanmar Institute for Integrated Development (MIID)
- › Labor Market Analysis for Developing Countries; Gary S. Fields, from Cornell University, ILR School
- › Myanmar Labour force, child labour and school to work transition survey 2015; Ministry of Labour, Employment and Social Security and Central Statistic Organization
- › Commercial Agriculture Expansion in Myanmar: Links to Deforestation, Conversion Timber, and Land Conflicts, Kevin Woods, 2015, Forest Trends Report Series;
- › THE World Factbook – Central Intelligence Agency (CIA) of the United States of America.
<https://www.cia.gov/library/publications/the-world-factbook/geos/bm.html>
 Date: 17.02.2017
- › THE World Bank- Country Profile, Myanmar
<http://www.worldbank.org/en/country/myanmar>
 Date: 12.02.2017





Appendix

The purpose of this Assessment is to provide adequate information on the characteristic of labor/skill supply in the Thanintharyi Region in Myanmar.

Confidentiality of the information: All the collected information will be treated confidential and analyzed at the aggregated level. The security of personal information is guaranteed and will not be used for other purposes.

Interviewer name _____		Respondent name: _____	
Village name _____	Code: _____	_____	
Village tract name _____	Code: _____	1.M <input type="checkbox"/>	2.F <input type="checkbox"/>
Township name _____	Code: _____	Respondent sex _____	
District name _____	Code: _____	Date of Interview _____	Nov. 2016

1. General Information

Age	Ethnicity/ Race	Religion
	1. <input type="checkbox"/> Burma 2. <input type="checkbox"/> Karen 3. <input type="checkbox"/> Mon	1. <input type="checkbox"/> Buddhist 2. <input type="checkbox"/> Baptist 3. <input type="checkbox"/> Catholic
	4. <input type="checkbox"/> Rakhine 5. <input type="checkbox"/> Other _____	4. <input type="checkbox"/> Moslem 5. <input type="checkbox"/> Other _____

1. Number of person living in the same household. _____
2. Number of person who are participating in the labor market. _____
3. For how long have you lived in this area? _____

Highest Education
1. <input type="checkbox"/> no school attendance 2. <input type="checkbox"/> Primary level (up to 4th Standard)
3. <input type="checkbox"/> Middle (up to 8th Std.) 4. <input type="checkbox"/> High school (up to 10th Std.)
5. <input type="checkbox"/> Other _____

2. Occupational skills

1. What is your current profession? _____

2. For how many years have you practiced your profession? _____

3. Have you received a Vocational training? 1. ☐ No 2. ☐ Yes

If yes, which kind of VC? _____

Skills	Not so good (1)	Ok (2)	Well (3)	Very well (4)
Computer skills:				
Writing and reading skills:				
Mathematic skills				
District name				

Language Skills	Not so good (1)	Ok (2)	Well (3)	Very well (4)
Burmese				
Poe Karen				
Sagaw Karen				
Thai				
Mon				
English				
*				
*				
*Other Language				

3. Income

1. What is your current employment status? (Highest Income)

1. ☐ Self employed 2. ☐ Part time worker 3. ☐ Day laborer 4. ☐ Permanent employee
 5. ☐ Seasonal worker 6. ☐ Unemployed 7. ☐ Other _____

2. How many hours per day do you usually work? _____ hours

	Source of income	Average Income per month	Average Income per year	Remark
1	Salary			

3. In which month(s) do you have the highest income? (Max. 4)

January	1. <input type="checkbox"/>	August	8. <input type="checkbox"/>
February	2. <input type="checkbox"/>	September	9. <input type="checkbox"/>
March	3. <input type="checkbox"/>	October	10. <input type="checkbox"/>
April	4. <input type="checkbox"/>	November	11. <input type="checkbox"/>
May	5. <input type="checkbox"/>	December	12. <input type="checkbox"/>
June	6. <input type="checkbox"/>	None , income is constant throughout the year	<input type="checkbox"/>
July	7. <input type="checkbox"/>		

4. Migration Experience

1. Have you worked outside of Myanmar? 1. ☐ Yes 2. ☐ No

1.1. If yes, Where have you migrated to:

1. ☐ Thailand 2. ☐ Malaysia 3. ☐ Singapore 4. ☐ Korea 5. ☐ Qatar 6. ☐ Emirates
 7. ☐ Other _____

1.2. What were the main reasons for you to migrate?

- Better job opportunities 1. ☐
Higher Salary 2. ☐
Poverty 3. ☐
Others (Specify) 4. ☐ _____

2. Do you have currently plans to work outside of Myanmar? 1. ☐ Yes 2. ☐ No

5. Work record

1. How often did you change the job within the last 3 years? _____

1. What were the reasons?

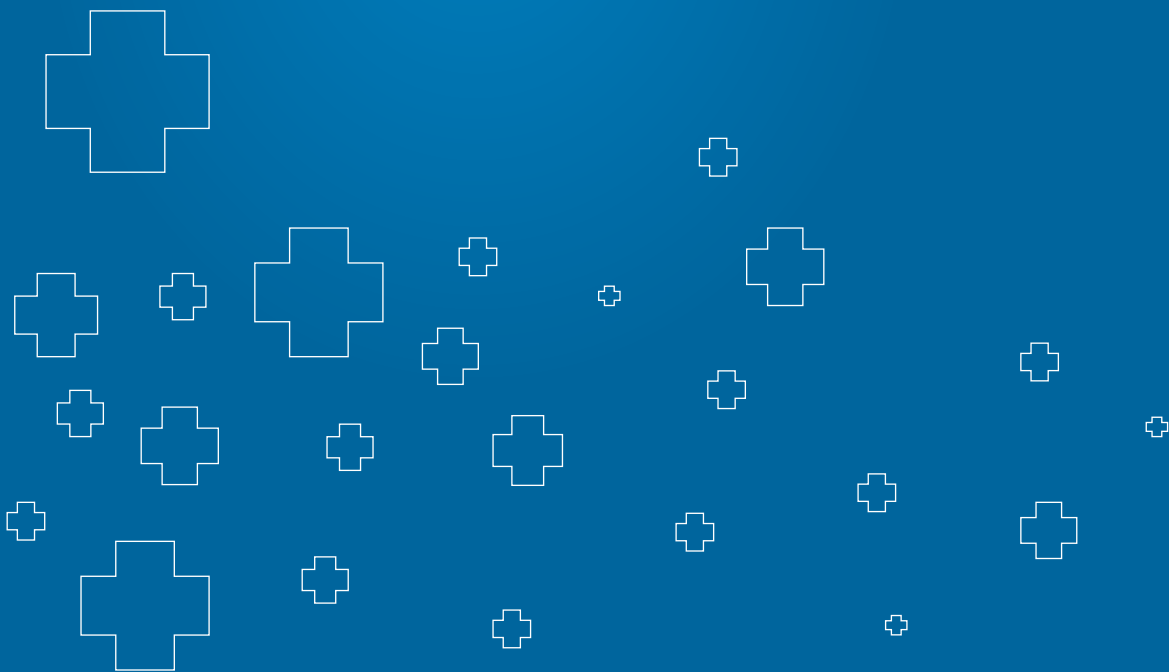
1. ☐ Sickness 2. ☐ Low income 3. ☐ No future 4. ☐ No market
5. ☐ Others _____

2. What can you do really well? _____

3. What is your Desired Career/ what is your passion? _____

4. In which of the following courses would you be interested?
(Up to 4 preferred subjects)

- | | | | |
|--------------------------------|-----------------------------|-------------------------|------------------------------|
| Mechanic, Motorcycle repair | 1. <input type="checkbox"/> | Food preparation | 8. <input type="checkbox"/> |
| Carpentry | 2. <input type="checkbox"/> | Sustainable Agriculture | 9. <input type="checkbox"/> |
| Electric wiring | 3. <input type="checkbox"/> | Cell phone repair | 10. <input type="checkbox"/> |
| Masonry | 4. <input type="checkbox"/> | T.V repair | 11. <input type="checkbox"/> |
| Hair dressing and Beauty salon | 5. <input type="checkbox"/> | Other: specify | 1. <input type="checkbox"/> |
| Hotel Service | 6. <input type="checkbox"/> | | 2. <input type="checkbox"/> |
| Traditional weaving | 7. <input type="checkbox"/> | | |



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