

**TOURISM IN MYANMAR AND POTENTIAL SUSTAINABILITY OF  
LACQUERWARE INDUSTRY**

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บทคัดย่อและแฟ้มข้อมูลฉบับเต็มของวิทยานิพนธ์ตั้งแต่ปีการศึกษา 2554 ที่ให้บริการในคลังปัญญาจุฬาฯ (CUIR)  
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งานวิจัยนี้มีวัตถุประสงค์เพื่อแสดงให้เห็นว่าการพัฒนาการท่องเที่ยวที่มีอิทธิพลต่อการผลิตเครื่องเงิน การค้าและเงื่อนไขทางเศรษฐกิจ และสังคมของผู้ประกอบการเครื่องเงิน และช่างฝีมือในเมืองบะกันก่อนและหลังปี ค.ศ. 2011 นอกจากนี้ยังมีวัตถุประสงค์เพื่อศึกษาผลกระทบของการท่องเที่ยวในธุรกิจเครื่องเงินที่เกี่ยวข้อง และบทบาทของ วิทยาลัยเทคโนโลยีเครื่องเงินเพื่อความยั่งยืนของอุตสาหกรรมเครื่องเงินในเมืองบะกัน เมืองบะกันหรือพุกามเป็นเมืองโบราณที่ตั้งอยู่ในเมืองอยู่ทางตอนเหนือของประเทศเมียนมาร์ เป็นเมืองหนึ่งที่มีชื่อเสียงมากที่สุดของการท่องเที่ยวในประเทศ รู้จักกันดีว่ามี โบราณสถานและเจดีย์เก่าแก่มากกว่า 2,000 แห่ง เมื่อย้อนไปในศตวรรษที่ 11 ผู้ที่อาศัยอยู่ในเมืองนี้ส่วนใหญ่พึ่งพาธุรกิจที่เกี่ยวกับการท่องเที่ยว และเป็นเมืองที่รู้จักกันทั้งประเทศ และต่างประเทศที่ผลิตเครื่องเงินเป็นของที่ระลึก ในปี ค.ศ.2011 จำนวนนักท่องเที่ยวเพิ่มขึ้นอันเนื่องมาจากการเปลี่ยนแปลงเป็นประชาธิปไตยในเมียนมาร์ ในบะกันเองก็เช่นกัน เป็นผลให้ความต้องการผลิตภัณฑ์ของที่ระลึกที่ทำจากเครื่องเงินเพิ่มขึ้นด้วย ความเป็นไปได้ที่จะแนะนำว่าการค้าทั้งภูมิภาคของเครื่องเงินนั้นขึ้นอยู่กับจำนวนนักท่องเที่ยว ธุรกิจเครื่องเงินไม้ไผ่เรซินย้อมสีปรับตัวดีขึ้นหลังปี ค.ศ. 2011 ที่เป็นผลมาจากการพัฒนาการท่องเที่ยว แม้ว่าธุรกิจเครื่องเงินจะได้รับการพัฒนา และยังเป็นที่น่าสนใจก่อนช่วงต่ำของคนรุ่นใหม่ในท้องถิ่นที่มีความต้องการเข้าร่วมกับอุตสาหกรรมนี้ และดูเหมือนว่าจะถูกจัดการทำให้เป็นอุตสาหกรรมที่ยั่งยืนต่อไป ในขณะที่ความต้องการมีปริมาณที่สูงขึ้น ผู้ประกอบการเครื่องเงินขนาดเล็กไม่สามารถจำหน่ายผลิตภัณฑ์ของพวกเขาต่อนักท่องเที่ยวโดยตรงได้ พวกเขาจำหน่ายผลิตภัณฑ์ของพวกเขาที่ร้านขายเครื่องเงินขนาดใหญ่ที่มีหน้าร้านติดถนนและสามารถเข้าถึงนักท่องเที่ยวได้โดยง่าย ร้านเครื่องเงินขนาดใหญ่ไม่เพียงแต่ผลิตของตนเองเท่านั้น แต่ยังซื้อของที่ระลึกเครื่องเงินที่ทำจากผู้ประกอบการขนาดเล็กจากหมู่บ้านผ่านพ่อค้าคนกลางเพราะผลิตภัณฑ์ของพวกเขาไม่เพียงพอไม่สามารถตอบสนองความต้องการที่มีอยู่สูงในอุตสาหกรรมนี้ได้ แม้ว่าผู้ประกอบการขนาดใหญ่และผู้ประกอบการขนาดเล็กที่มีอยู่ในหมู่บ้านเดียวกัน และในบริเวณใกล้เคียงกัน ในขณะเดียวกันผู้ประกอบการขนาดเล็กต้องพึ่งพาอาศัยพ่อค้าคนกลางในการขายผลิตภัณฑ์ของพวกเขา ความต้องการของที่ระลึกเครื่องเงินมีปริมาณสูงขึ้นหลังปี ค.ศ. 2011 ส่งผลให้มีการจ้างงานช่างฝีมือในหมู่บ้านอย่างเต็มรูปแบบ ก่อนปี ค.ศ. 2011 อุตสาหกรรมการท่องเที่ยวไม่ปลอดภัย ทำให้มีการจ้างงานน้อย และมีช่างฝีมือว่างงาน ดังนั้นพวกเขาต้องย้ายไปหางานที่อื่นทำ หรือหางานอย่างอื่นทำทดแทนในบะกัน แต่หลังจากจากปี ค.ศ. 2011 พวกเขาไม่จำเป็นหางานอื่นทำ เพราะว่าความต้องการของที่ระลึกเครื่องเงินมีปริมาณที่สูงขึ้น ได้สร้างโอกาสการทำงานมากขึ้น และมีข้อเสนอที่ดีให้กับช่างฝีมือเครื่องเงิน โรงเรียนการฝึกอบรมเครื่องเงิน ได้รับการก่อตั้งขึ้นในบะกันตั้งแต่ครั้งอยู่ภายใต้การปกครองของอังกฤษ และถูกปรับให้เป็น วิทยาลัยเทคโนโลยีเครื่องเงิน และทำการฝึกอบรมอื่นๆ ไม่เพียงแต่ในบะกัน แต่ยังคงกระจายไปในชนบทของประเทศเมียนมาร์ด้วย

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ZAR NI MAUNG: TOURISM IN MYANMAR AND POTENTIAL  
SUSTAINABILITY OF LACQUERWARE INDUSTRY. ADVISOR:  
ASSOC. PROF. NITI PAWAKAPAN, Ph.D., 108 pp.

Bagan is an ancient city which is one of Myanmar's most famous tourism sites. Most of the inhabitants of Bagan rely on tourism-related business and the town is famous for its specialty lacquerware souvenir products. Since 2011 after democratization, international tourist arrivals have increased and along with it, the demand for lacquerware. The purpose of this thesis is to illustrate how tourism development influences lacquerware production, trade and socio-economic conditions of lacquerware entrepreneurs and craftsmen in Bagan before and after 2011 as well as to establish the role of the Lacquerware Technology College in sustainability of the lacquerware industry in Bagan. This thesis puts forward the hypothesis that there are both positive and negative impacts on the local lacquerware industry by the tourism industry. This study uses qualitative methods namely key-informant interviews, focus group discussions and observational methods to collect evidence to answer the research questions. The site chosen to carry out research was Myin-Ka-Bar village, Bagan; the main production source of lacquerware in the area. Although lacquerware and its related businesses have substantially increased due to tourism there are some threats to the long-term sustainability of the industry due to the lack of interest by the younger generation of locals. This thesis concludes that without the tourism industry and its continued growth, the lacquerware industry itself would die a natural death.

Field of Study: International                      Student's Signature .....

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## LIST OF ACRONYMS

ASEAN	Association of Southeast Asian Nations
ATM	Automatic Teller Machine
BEDC	Burma Economic Development Corporation
DCA	Department for Civil Aviation
FDI	Foreign Direct Investment
FIT	Free Individual Traveler
GDP	Gross Domestic Product
MHA	Myanmar Hoteliers Association
MMC	Myanmar Marketing Committee
MOHT	Ministry of Hotel and Tourism
PPP	Public Private Partnership
SLORC	State Law and Order Restoration Council
SPDC	State Peace and Development Council
TDC	Township Development Council
TIS	Tourist Information Service
UMTA	Union of Myanmar Travel Association
UNDP	United Nations Development Programme
UNEP	United Nations Environmental Program
UNESCAP	United Nations Economic and Social Commission for Asia and the Pacific
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Trade Organization
UBA	Union of Burma Airways
VOA	Visa On Arrival
WTTC	World Travel and Tourism Council

# CHAPTER I

## INTRODUCTION

### 1.1 Rationale of the Study

According to the United Nations World Tourism Organization (UNWTO), tourism is defined as “a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.” The tourism industry is one of the most dynamic and fastest-growing economic sectors in the world.

The government of Myanmar has officially adopted the development of tourism as one of its economic priorities, noting that tourism serves as one of the country’s most lucrative sectors (Pritchard, 2012, p. 2). As soon as the political system changed in 2011, obvious improvements in the tourism industry could be determined as reflected by comparing the number of tourist arrivals and income earned from the tourism industry before and after 2011 as seen in the table below.

Table 1 Number of Tourist Arrivals and Earnings from Tourism Industry, (MOHT, 2013)

Year	Number of Tourist Arrivals	Earnings from Tourism Industry
2009	762,547	\$ 196 million
2010	791,505	\$ 254 million
2011	816,369	\$ 319 million
2012	1,058,995	\$ 534 million
2013	2,044,307	\$ 926 million

Many developing countries try to develop strategies for tourism development as one of the ways for reduction of poverty. But, “there are many barriers to successful development of such strategies such as the lack of human capital and financial capital amongst the poor, inadequate access to the tourism market, lack of

pro-active government support for involvement by the poor, gender norms and constraints, and incompatibility with existing livelihood strategies” (Ashley, 2002, p. 30).

Bagan is an ancient city located in the Nyaung-Oo township in Myanmar. The city is one of the most famous tourism sites in Myanmar and has gained international renown for possessing more than two thousands ancient pagodas dating back from the 11<sup>th</sup> century A.D (Hlaing, 2008, p. 3). Most of the inhabitants in the Nyaung-Oo township rely on tourism-related businesses for their livelihood. The specialty of the Nyaung-Oo township is its lacquerware industry, which is mostly made into tourist souvenirs. The lone college for lacquerware artisanship and the only lacquerware museum in the whole of Myanmar are situated in this township. The region’s lacquerware trade has grown in leaps and bounds with parallel to the increase of tourism and currently is dependent upon international tourism. The average wage of a trained worker in lacquerware is US \$ 5 and a trainee gets \$ 3 per day. It takes anything between two to five years to become a professional lacquerware craftsman who is trained professionally. The price of lacquerware items range from US \$ 20 for small souvenirs to over US \$ 15,000 for a full-sized dining table set. International tourists mostly prefer small lacquerware pieces which are easily carried in their luggage as souvenirs (Roughneen, 2014).

The expansion of tourism makes an important contribution to the development of a country, especially when that country has chosen tourism as an important sector to develop as a means for economic growth. Tourism can stimulate development in terms of income, employment, foreign exchange earnings, taxation, and multiplier effects. The tourism industry significantly contributes to creation of employment, small entrepreneurship, and greater gender equity and poverty alleviation(Stynes, 1997, pp. 3-26). As before-mentioned, the development of tourism in Myanmar significantly occurred after the democratization of Myanmar in 2011. Before that, tourism did not develop and there was little, if any growth in the region. In and around the Nyaung-Oo township itself, most of the existing trained lacquerware craftsmen had changed their careers or were contemplating doing so due to the scarcity of jobs.

The lacquerware industry itself was faced with the threat to extinction because of scarce and expensive raw material, labour shortages and low demand due to the high price of lacquerware craft (Lillehoj, 2004, pp. 173-190). The movement of lacquerware craftsmen from the lacquerware industry to other tourism-related services even at this point in time has exacerbated the existing threats for the sustainability of lacquerware industry. Moreover, another threat for the sustainability of lacquerware industry is the existence of low quality products. The existence of such products affects the quality and reputation of genuine lacquerware as well as the sustainability of the lacquerware industry. It is undisputed that entrepreneurs in the tourism industry will reap huge benefits from this sector. The lacquerware entrepreneur will obtain many benefits because tourism development will indirectly increase lacquerware trade. However what is unclear is how much of these benefits actually spill down to the craftsmen in the lacquerware industry. If these groups of people do not reap much benefit from the development of tourism and there are other better employment opportunities in other tourism-related jobs, they will change their livelihoods and this will severely impact the sustainability of lacquerware industry. So, this thesis studied how tourism development influenced the sustainability of lacquerware industry in Nyaung-Oo township in terms of the lacquerware trade, socio-economic development of people in the lacquerware industry and impact on lacquerware-related businesses.

## **1.2. Research Questions**

Primary: How does tourism development influence the sustainability of lacquerware industry in Nyaung-Oo township?

1. What are the changes in the lacquerware industry in Nyaung-Oo township before and after 2011?
2. How does tourism affect socio-economic development of craftsmen in the lacquerware industry?
3. What is the impact of tourism on lacquerware-related businesses?

4. What is the role of the Lacquerware Technology College in the future sustainability of lacquerware industry in Bagan?

### **1.3. Research Objectives**

Primary: To study the influence of tourism on the sustainability of the lacquerware industry in the Nyaung-Oo township

1. To study the changes in the lacquerware industry in Nyaung-Oo township before and after 2011
2. To analyze the impacts of tourism on socio-economic development of craftsmen in the lacquerware industry
3. To study the impact of tourism on lacquerware-related businesses
4. To study the role of the Lacquerware Technology College in the future sustainability of the lacquerware industry in Bagan

### **1.4. Method of Study**

Both quantitative and qualitative analyses were employed. Primary data was collected through a household survey on the residents at Myin-Ka-Bar village, Nyaung-Oo township, Myanmar. Twenty four participants were selected using purposive sampling. Key Informant Interview (KII) of 12 persons and 2 Focus Group Discussions were carried out. Published Books, periodicals related to this study, data from departmental records of tourists, and papers of state, journal were used for secondary data.



Table 2 Participants at the study site

<b>Participants Information</b>	<b>No</b>	<b>Location</b>	<b>Types of Interview</b>
<b>1. The owners of lacquerware workshop</b>			
Owners of big workshop	2	Myin-Ka-Bar	In-depth interview
Owners of small scale domestic business	2	Myin-Ka-Bar	In-depth interview
Owner of fake lacquerware workshop	1	Myin-Ka-Bar	In-depth interview
<b>2. Lacquerware-related businesses</b>			
Bamboo seller	1	Myin-Ka-Bar	Semi-structured interview
Owner of furniture workshop	1	Myin-Ka-Bar	Semi-structured interview
Tour Guide	1	Bagan	Semi-structured interview
<b>3. Lacquerware souvenir sellers at pagoda stalls</b>	2	Bagan, Nyaung-Oo	In-depth interview
<b>4. Teacher at lacquerware technology college</b>	1	Bagan	In-depth interview
<b>5. Outsider ( Manager at purified drinking water Company)</b>	1	Bagan	Semi-structured interview
<b>6. Focus Group Discussions</b>			
FGD1 : Local community, owners of small lacquerware enterprises, lacquerware craftsmen	6	Myin-Ka-Bar	Semi-structured interview
FGD2 : Local community, owners of big lacquerware enterprises, lacquerware craftsmen	6	Myin-Ka-Bar	Semi-structured interview
<b>Total participants</b>	24		

### **1.5 Scope and Limitation of the Study**

This study focused on tourism and lacquerware industry in Nyaung-Oo (Nyaung-U) District. The study site was Myin-Ka-Bar village at old Bagan town, Nyaung-Oo District because it is the most famous for lacquerware production and nearly the whole village relies on lacquerware businesses for their livelihood. There are many factors threatening the sustainability of lacquerware industry. This study only focuses how tourism development influences the sustainability of lacquerware industry and socio-economic development of craftsmen. Other factors such as scarce and expensive of raw material and other inputs were not studied in this thesis.

The researcher could only stay in the field for two weeks because of insufficient time and budgetary concerns. Moreover, it was difficult to interview craftsmen because they were working the whole day in the workshop. The researcher had a chance to conduct interviews only in the evening and night when they were home. Many of the big lacquerware entrepreneurs did not have the experience of organizing a meeting to discuss their business interests. There was also no existing organization for lacquerware entrepreneurs or craftsmen. In addition, they are not transparent, keeping some information secret and not talking about some issues openly, especially concerning questions related to government and business issues. This lack of transparency made it difficult to conduct the FGD and/or make conclusions from its results. Another limitation was the lack of collaboration from township and village authorities. The researcher could not obtain secondary data from these authorities directly and had to use other means to obtain these data.

In summary, time, budget, a lack of transparency from big entrepreneurs and a lack of collaboration from the local authorities were the limitations from this research.

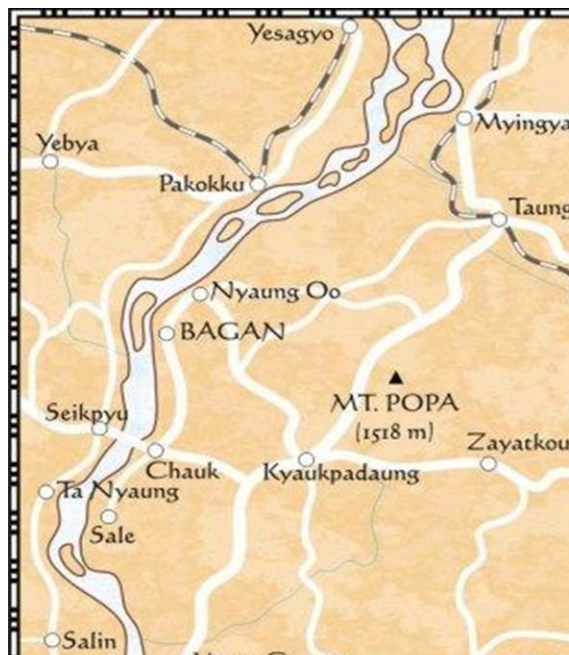
## 1.6 Significance of Research

Though there is research on tourism in Myanmar, they mostly focus on the macro level, with some studies focusing on the trickle-down effect of tourism on people and related businesses. This study is the first to determine the influence of tourism on the lacquerware industry specifically. Despite the tourism influx into areas such as Bagan post-democratization, it remains unclear on how effective tourism will be on improving local industries and livelihoods. The specialty of Bagan is lacquerware souvenirs and the market largely depends upon international mass tourism these days. If the livelihoods of local community in lacquerware industry are insecure, this traditional handicraft will disappear in future. This thesis filled the gap for the sustainability of lacquerware industry by studying how tourism influence lacquerware industry, the support of government on lacquerware industry, the market structure and the social structure in the community who are involved in the lacquerware industry.

### 1.7 Study Site



Map 1: Nyaung-Oo (Nyaung-U) Township in Mvanmar



Map 2: Nyaung-Oo (Nyaung-U) and Bagan towns

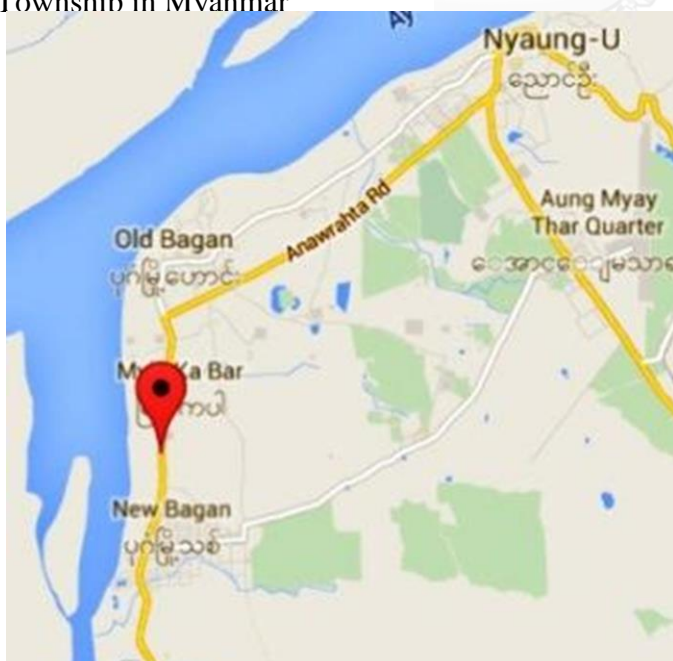


Figure 1 Myin-Ka-Bar village near Bagan and Nyaung-Oo town

## 1.8 Conceptual Framework

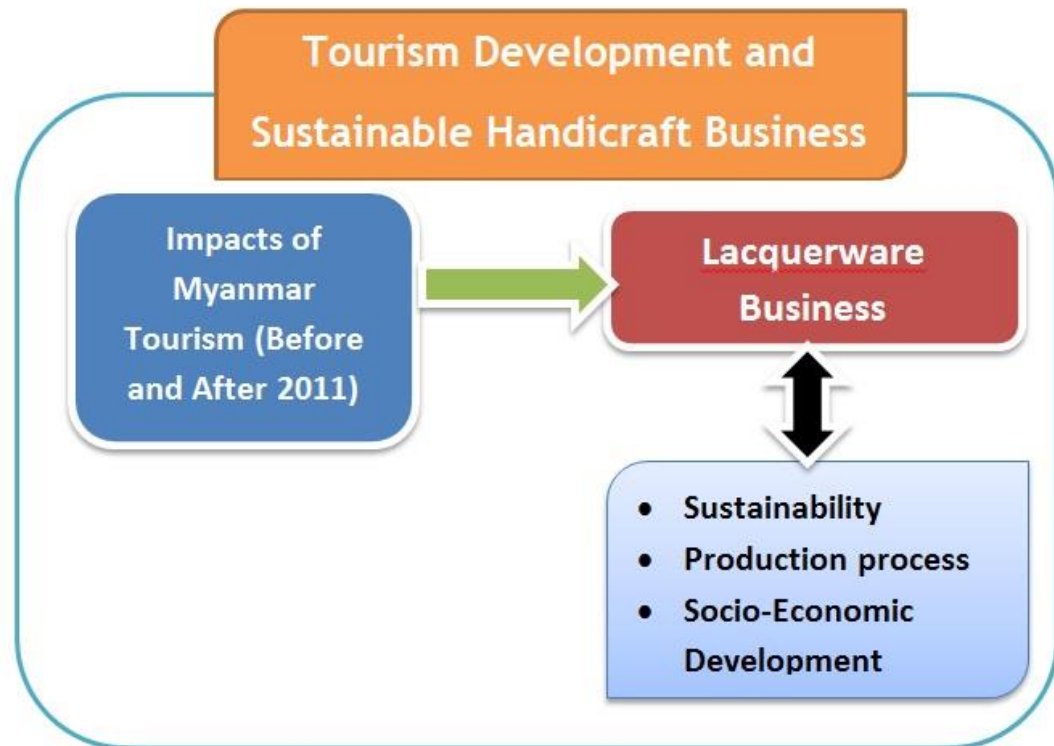


Figure 2 Conceptual framework

Tourism has a big economic impact on the local community since the tourism industry promotes the growth of the local economy in a destination area. Local handicraft businesses are also promoted by tourism as souvenirs for tourists. Handicraft industries in a tourist destination area rely on the tourism industry for their market. In this thesis, sustainability means the continued existence of the lacquerware industry in the long run. To be sustainable in the long run, skillful craftsmen and reliable market demand are essential. So, in the concept of sustainability, the socio economic wellbeing of craftsmen is also very important. Moreover, the young generation who will succeed to inherit the lacquerware-making skill are also important. In these days, although existing craftsmen stick to their career of making lacquerware, the low interest amongst the younger generation to join lacquerware industry is a threat for the sustainability of lacquerware handicraft. So, in this thesis, how big lacquerware entrepreneurs try to attract young generation to join in this

industry is discussed. Moreover, the role of the Lacquerware Technology College to produce youth lacquerware craftsmen is also discussed. Production process means how handicraft entrepreneurs adapt their production process according to the market demand. Socio-economic development means how tourism helps to improve the livelihood, skill and education of the family of craftsmen.

The tourism industry in Myanmar did not develop very well before 2011 because of political unrest and international sanctions on the military government. The lacquerware industry in Bagan totally relied on the tourism industry. Before 2011 and the development of tourism, some of the craftsmen could not stick in the lacquerware business. They had to change to other careers in Bagan or had to migrate to other regions for the survival of their family. But after 2011, the tourism industry in Myanmar boomed again after democratization. The development of tourism after 2011 led to improvement in tourism-related businesses including in the lacquerware industry. As a result, lacquerware craftsmen in Bagan did not need to change to other careers and they joined lacquerware industry again. This research focuses on tourism in Myanmar before and after 2011 and its influence on the sustainability, production process of lacquerware industry as well as the socioeconomic wellbeing of lacquerware craftsmen.

## **1.9 Organization of the Study**

This thesis is formulated into six chapters.

The first chapter contains the rationale, research questions, research objectives, research methodology, scope and limitations of study, significance of research, study site, conceptual framework and organization of the study.

The second chapter focuses on theoretical framework of the study. Main concepts of tourism; socio, cultural and economic impacts of tourism, tourism and lacquerware industry in neighbouring countries, the nature of handicraft industry,

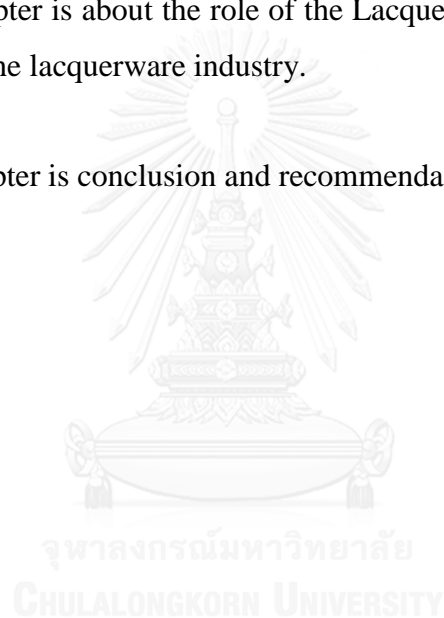
lacquerware industry in Myanmar, history of Nyaung-Oo township and its tourism development are discussed in this chapter.

The third chapter focuses on findings especially the impacts of tourism on lacquerware industry.

The fourth chapter also focused on findings especially in terms of the lacquerware-related businesses.

The fifth chapter is about the role of the Lacquerware Technology College on the sustainability of the lacquerware industry.

The sixth chapter is conclusion and recommendations.



## **CHAPTER II**

### **LITERATURE REVIEW**

#### **2.1 Main Concepts of Tourism**

##### **2.1.1 Economic Impacts of Tourism**

A region or a place is usually promoted as a tourism destination with an underlying interest of the local administration who expects improved economic improvement. Economic impacts of tourism function various ways to stimulate the host economy and the livelihood of its people. The main positive economic impact of tourism is concerned with foreign exchange earnings, contribution to government revenue, generation of employment and business opportunities, and function as a driving factor for other industries and segments of the local economy. To begin with, international tourism, like an export sector, is one of the factors that assist in creating a flow of foreign currency into the host economy (Theobald, 1995, p. 86). Most of the least developed countries hope that tourism could be stimulated in their countries as it would generate a substantial amount of foreign exchange earnings to the national economy, thereby correcting the balance of payment deficit. Consequently, it would alleviate the problems of balance of payment in many countries (Kershaw & Lickorish, 1958, pp. 10-11).

The next impact of tourism is in its contribution to government revenues. International tourism increases significantly the share of government tax revenues throughout the world. According to the United Nations Environmental Program (UNEP), the revenue can be classified into two: direct contributions generated by taxes on income from employment and business in tourism industry and by direct levies on tourists; as well as via indirect contributions, generated by taxes and duties levied on goods and services supplied to tourists.



In addition, tourism contributes to the creation of employment (Stynes, 1997, p. 16). Tourism as a labour intensive industry creates jobs both directly in the hotel and tourism industry and; indirectly through the supply of goods and services needed by tourism-related industries, ranging from unskilled to highly specialized jobs requiring skilled labours. These include not only full-time work but also part-time ones in formal sectors and a variety of jobs even in an informal sector (Neto, 2003, pp. 214-221). Tourism contributes more effectively to employment generation than in other industries in the least developed regions of a country (Archer & Cooper, 1994, p. 76). In particular, the positive impact by tourism on generating employment is apparent and significant in those countries with surplus labour (Kershaw & Lickorish, 1958, pp. 53-56). Moreover, because of an increase in the number of tourist arrivals, many facilities and tourism-related infrastructure are built and maintained to fulfill the need of the incoming tourists. Due to its nature as a stimulus to building infrastructure facilities, once the tourism industry begins to develop in an area, there is automatic growth and development of local infrastructure (Kershaw & Lickorish, 1958, p. 85). The level of investment, including both domestic and foreign direct investment, becomes higher in the host economy. The development of tourism as a whole can be achieved by considerable investments in infrastructure (Neto, 2003, p. 215) and thus infrastructure development goes hand-in-hand with local tourism development. An indirect recipient of these infrastructure development schemes would be local residents, who now can gain access to tourism-related infrastructure alongside tourists for whom they are built for.

Moreover, the growth of tourism provides incentives to local people to promote local handicraft businesses (Allcock, 2006, p. 93) and stimulates local entrepreneurship by providing goods and services that could never been supported before in the local economy (Anna, 1996, p. 108). Furthermore, the increasing number of tourist arrivals and a higher growth of tourism industry lead to an increase in prices of the scarce resources in the local economy, thus the owners of such resources obtain much benefit from these price increases (Archer & Cooper, 1994, p. 76). In addition to this, it must be realised that, tourism is one of the most promising driving factors for other industries. Although the most direct beneficial effect occurs

within the tourism industry itself, this in no small part contributes indirectly to other sectors of the economy through secondary effects (Stynes, 1997, pp. 11-16). Its expenditures can have a positive impact on all economic sectors and results in diversification of the economy (Anna, 1996, p. 108). In short it can be put forth that tourism produces a multiplier effect in the host economy, focusing on five effects in particular; transaction of sales, output, income, revenue and employment (Frechtling & Horvath, 1999, pp. 324-329).

Finally, tourism has an effect on general economic development positively because, as mentioned above, it generates income, employment, infrastructure development. The role of tourism is considered important as the main or only means for local economic development (Roe, Ashley, Page, & Meyer, 2004), proving to be in most cases the most promising driving force (Neto, 2003, p. 216) for economic development in most developing and least developed countries, and small island states.

On the other hand, “the negative economic impacts of tourism mainly deal with leakages, enclave tourism, infrastructure costs, an increase in prices, economic dependence on tourism, and the existence of seasonal character jobs” (UNEP). First there is a leakage of foreign exchange earnings from international tourism. There are two types of leakages: import leakage and export leakage. The former results from imports of equipment and materials for construction and consumer goods required for the tourism industry, which cannot be produced by locals while the latter one occurs when foreign investors take their profits and foreign workers repatriate their salaries back to their countries. Through this foreign debts incurred in the development of tourism are amortized. Next, ‘all-inclusive’ tour packages reduce tourism incomes which are distributed to the local economy. Local people have fewer opportunities to exploit tourists’ expenditures and profits from tourism (UNEP). Second, the public sector is responsible for the provision of tourism-related infrastructure (Sakai, 2006, pp. 52-55). Tourism development can be a burden on local Government and local people have to pay additional taxes for the development of infrastructure and other related costs (Stynes, 1997, p. 3). If those infrastructure are built by the local

Government, the Government investment decreases in other critical areas, such as in the education and health sectors (UNEP).

In addition, tourism industry may lead to changes in prices (Stynes, 1997, p. 5). When there is a growth of tourism in a destination or place, it makes not only demands on its resources but also demands on basic goods and services which are now increased for tourists. This then leads to higher prices in the host economy which causes negative effects on the local people in the long run, especially to whose incomes have not proportionally increased (UNEP).

Moreover, the tourism industry in every region of the world has seasonal variations and fluctuations; as a result, the local economy in a tourist destination has to face the problem of an increase in underemployment or unemployment during its out-of-season periods (UNEP). International terrorism and regional conflicts are some of the recent causes of risks to such tourist-based local economies. Because of the nature of relatively elastic income demand of tourism, worldwide economic recessions and depressions may also affect the local economy. Consequently, over reliance of an economy on tourism can lead to risks due to its nature of seasonal effect and shock. If the host economy heavily depends on tourism, it could function as a major stressor in both this industry and the people involved in it locally (Anna, 1996, pp. 109-111).

### **2.1.2 Socio-Cultural Impacts of Tourism**

Tourism can also bring about social and cultural changes in host societies. Tourism brings into contact people of different races, nationalities and backgrounds (Anna, 1996, p. 109). Apart from this, it is an agent for major change in the socio-cultural system of a destination area because culture is founded on customs and traditions that are dynamic and adapting continually to both internal and external forces (UNESCAP, 1999).

The factors causing socio-cultural changes in host society consists of the interactions brought on by the tourist-host relationship and the development of tourism in a local community ” (Rätz, 2000, p. 5). Regarding the tourist-host relationship, tourists and host residents interact or encounter each other at three principal points which are: “the points of principal tourism use; the points where facilities are used jointly by the host community and tourists; and the point staffed by members of the host community and used mostly by visitors” (UNESCAP, 1999, p. 124).

First, it is necessary to study major features of tourist-host relations and factors which cause a social impact. The tourist-host relationship has some major features which can be described as “ transitory, unequal and unbalanced, lacks spontaneity and is limited by spatial and temporal constraints”(Rätz, 2000, pp. 1-7). “These features can be perceived as negative impacts in the concept of sustainable tourism”(Rätz, 2000, pp. 1-7). According to (Terzidou, Styliadis, & Szivas, 2008, pp. 114-124), factors influencing social impact are:

1. The volume and profile characteristics of the tourists;
2. Significant differences between small and big countries;
3. A host economic reliance on tourism;
4. The political structure
5. The pace of tourism development
6. Cultural similarity or dissimilarity

Tourism makes major changes in the social, political and cultural system of a destination area. Perceived effects by tourism on local society or destination places can be divided into “the characteristics of the destination area and social impact on infrastructure development and perceived effects on the local resources” (Ramchander, 2004, pp. 222-229).

To begin with, according to the UNWTO, “intercultural awareness and personal friendships fostered through tourism are a powerful force for improving

international understanding and for contributing to peace among all the nations of the world.” Tourism supports the chances for both tourists and hosts not only to foster mutual sympathy and understanding but also to decrease their prejudices against each other. The merits of social intercourse between tourists and local people can be considered as a major social benefit generated from tourism industry (UNEP). Consequently, tourism improves the image of a destination in the minds of its visitors (Ramchander, 2004, pp. 225-226).

Next, from a cultural aspect, tourism increases local cultural awareness (UNESCAP, 1999, p. 4), thereby contributing to the renaissance of traditions and forms and the revitalization of the culture through increased expenditures on both the purchase of cultural materials and taking part in non-material cultural activities (Terzidou et al., 2008, pp. 114-124) as well as imbuing in local people, a pride in local and national heritage and indigenous culture, cultural arts and crafts, and interest in its conservation and protection (UNEP).

Tourism can also increase funds for preservation of cultural and historical buildings and sites. These effects are apparent in the destinations which attract religious tourists because the local people in such a destination improve quality of cultural events and maintain traditions and religious faith due to religious tourism (UNESCAP, 1999, p. 4).

Tourism, as discussed earlier, can increase investment in infrastructure, most of which improve the living standards of the local people in a destination by giving them access to benefits of newly constructed physical infrastructure systems which primarily service the tourism industry (UNESCAP, 1999, p. 14). Furthermore, local residents can be educated about the outside world without leaving their homes and obtain social benefits, education and health, from social infrastructure and recreation facilities for tourists (Kearsley & Higham, 1997, pp. 125-130). Also, diversification of the host economy can improve the quality of life of the host society through tourism (UNESCAP, 1999, p. 4). In addition, new employment generated by tourism industry can result in an increased mobility of the unemployed youths and women in a

tourist country (Rätz, 2000, pp. 3-19). Finally, a high proportion of women can work and establish micro-enterprises in the tourism sector, thereby leading to the empowerment of women in the tourist destination (Manyara & Jones, 2007, pp. 628-641).

There are also negative effects ensuing from tourism. Firstly, an important negative impact on culture is the “commodification” (Ramchander, 2004, p. 222). Tourism as a major force of commodification can change local cultures into commodities. Colorful local costumes and customs, rituals and folk festivals and ethnic arts are turned into commodities by being performed and produced to meet tourists’ expectation. When tourists are motivated to seek authentic experiences, issue of ‘staged authenticity’ becomes crucial where a destination can be manipulated to contrive authenticity (Archer & Cooper, 1994, pp. 85-90). The ‘front stage’ is where performances and displays are conducted in modified forms for commercialization. Since authenticity is motivated by those who seek special or unique experiences, some tourists are motivated to seek genuine authenticity, and they then penetrate into the ‘back stage,’ where the local life and culture are still deemed to be ‘authentic’. Due to the short time and limited space in visiting tourists’ schedules but yet in order to cater to their requirements for local authentic performances and displays, cultural expressions and manifestations are altered to the tastes of tourists and more importantly, their schedules. This “staged authenticity” comes at the expense of the other meanings and rationales, causing “a freezing of culture and art styles in pseudo traditional form; a reduction or degradation of the quality of indigenous artistic work” (Ramchander, 2004, pp. 222-224). Staged authenticity has adapted the way crafts or rituals are made or performed, with downgrading of both content and skills. The least possible artistic performances are often shown and skilled craftwork is commercialized and trivialized to satisfy tourist demands as well as to be able to get the most commercial value of their time and efforts. This widespread commodification and commercialization due to tourism bring about cultural erosion (UNEP). Even more importantly, from the religious aspect, sacred sites and objects can be considered as commodities. Due to this even, religion is commoditized in some destinations in order to attract tourists to special events, or to

the architecture of religion buildings, as a consequence of which religious values decrease among the local people (Acharya, 2005, pp. 4-8).

Secondly, alterations in the traditional occupation of the locals is a result of tourism development (Acharya, 2005, p. 6). Tourism development applies pressure on traditional working patterns to diminish in many tourist attraction areas, , thereby causing the loss of their originality and unique flair (Terzidou & Stylidis, 2006, pp. 124-130), and changing from agricultural occupations to ones economically related to tourism (Rätz, 2000, pp. 10-19). As a consequence, creation of new employment, both directly and indirectly which is generated by tourism development brings migration problems into local society (Terzidou & Stylidis, 2006, pp. 76-80).

Thirdly, ‘demonstration effect,’ caused by admiring and imitating tourists, is one of the major factors which act in changing community values. It can make local residents desire to work harder or to be better educated, and to imitate the way of life of the tourists. Local residents sometimes would try to fulfill these desires even by resorting to illegal means (Ramchander, 2004, p. 225). Local residents try to emulate the behavior, attitude and consumption pattern of tourists, which hurts the sentiment of the local traditional people and furthermore, often is copied by the younger generation of locals especially by the youths in the destination who can emulate the speech and attire of tourists and copy tourists’ bad behaviours (UNESCAP, 1999, p. 120).

### **2.1.3 Socio-Economic Inequality in a Handicraft Community**

Anthropologist David V. Carruthers (2001) studied economic performance and social inequality of artisans among thirty-two workshops in in Michoacán and Oaxaca, Mexico. These handicraft communities faced many structural barriers to the improvement of their business. They created high levels of social inequality between themselves in the local craft economy of village. For instance, those who owned input resources such as clay, raw materials, and machines were the landowning class while craftsmen were paid small amounts of money for producing their products.

They were forced to sell their products back to the landowning class who functioned as middlemen, who sold these artisans' products, often as a form of exploitation of these artisans. So, artisans faced issues of subsistence and were living practically day-to-day, although they were the main and original producers of handicrafts. What was an interesting finding was that despite of these social inequalities which existed, there were still some handicraft sellers who succeeded while some who failed economically. Some handicraft sellers became successful and their products were purchased to be sold under the umbrella of famous brands that support them in get higher prices for their handicraft products in the market. Even among the successful artisans, levels of social inequality could be found. Some of the artisans also sold their products and these artisans-cum-souvenir-sellers could enjoy the surplus value of their production. Those artisan-vendors automatically became gatekeepers in the market. They wanted to control the handicraft market. On the other hand, those craftsmen who did not sell their products by themselves were faced with economic hardship because their work was exploited by middlemen. The researcher concluded in his findings that generally the middlemen always won. Successful handicraft sellers often had their own individual reputations which could be used as a base to be transformed into a brand name. These findings helped explain the complicated social structure and winners and losers amongst the artisans, artisan-vendors, and middlemen (Wherry, 2005, pp. 28-32).

## **2.2 Tourism Industry in Neighbouring Countries**

### **2.2.1 Thailand**

The tourism industry in Thailand has improved because of promotion campaigns by government. But, this has led to increased inequality among the different classes. Although tourism industry has improved a lot of locals' livelihoods in tourist areas and increased aggregate household income, the distribution of benefits from tourism is unequal because it is not concentrated and designed to use a lot of low-level or unskilled labours. Moreover, because of the attraction of huge benefits from the tourism sector, capitalists prefer investing in it a lot, contributing to



the weakening of other trade sectors such as agriculture (Wattanakuljarus & Coxhead, 2008, pp. 929-930). Tourist arrivals in Thailand rocketed over the past 30 years because of determined efforts of the Thai government to promote Thailand as a major tourist destination in Southeast Asia which was supported by the private sector who mostly invested in the development of the tourism industry in Thailand (Kaosa-ard, 1994, pp. 3-4). Previously, tourists were interested in only limited tourist destinations in some cities. But, the Thai government tried to promote other remote areas to become alternative tourist destinations especially in the north and northeast by promoting culture and traditional handicraft. These areas were very far away from urban cities and the market of traditional handicrafts relied on local customers although the local community could sell their products to tourists via middlemen who then marketed their products in tourist-visited areas. But, with the strong efforts and support of the Thai government, the transportation system to these remote areas were improved and the local communities could now sell their handicrafts directly to tourists these days (Cohen, 1995, pp. 225-234). Thailand has long passed the first stage of tourism development which relied on nature. Diversity of tour programs can be found in Thailand with each region having its own attractions, arts, culture and even shopping havens.

Moreover, an increase in reservation of protected wildlife and ecological havens and preservation of cultural and historical heritage, environmental conservation were increasingly designated by law in Thailand. Part of Thailand's enormous appeal is that it has a variety of different activities and venues for different settings; from many unspoiled islands for scuba diving and sea canoeing to facilities for meetings and seminars at the level of international standards and other attractions. Thailand is even cooperating with ASEAN member countries to organize concerted tourism activities by promoting the entire region as a single destination.

However tourism has been seen by some to be one of the causes of cultural decline in Thailand. Some ceremonies and cultural events have become a kind of show business by tourism. Some modified Thai cultural events are organized with the purpose of attracting foreign tourists. Thailand is well-known for its high

hospitality standards towards tourist and is billed as an exotic destination. However many negative impacts of tourism such as prostitutes, traffic and pollution can be found in Thailand. The major tourist cities in Thailand including Bangkok, Chiang Mai, Pattaya and Phuket are facing problems of noise and air pollution caused by traffic congestion (Cohen, 1995, pp. 225-234). In Thailand, improvement of tourism sectors does not bring comprehensive development but is often seen as leading to increased inequality among the different levels of locals. So, feasible plan and strong policies are needed for the local poor communities to get real sustainable benefits from the tourist industry (Wattanukuljarus & Coxhead, 2008, pp. 931-948).

### **2.2.2 Laos**

Laos started allowing international tourists into the country in 1989. The initial plan for attracting tourists and developing the tourist industry focused on small scale businesses. In 1995, tourism became the major income source for economic development. In 1998, the National Tourism Development Plan was implemented comprising four types of tours: 1. Traditional tours & sightseeing, 2. Tourists with special interests (eg: eco-tourism, adventure), 3. Cross-border tourists and 4. Domestic tourists. According to the report of National Marketing Plan for Tourism in 1999, this policy succeeded and tourism became one of the key exports of Laos. Tourism became a major industry and an important source for national income (7%-9% of GDP), creating numerous employment opportunities. Its labour intensiveness contributed in small part to poverty reduction. The tourism strategy in Laos focused on community-based activities and pro-poor tourism development and was created to improve infrastructure concerning tourism-related areas and industries (Harrison & Schipani, 2007, pp. 199-212).

In Laos, one of the beneficiaries of the successful strategy for tourism was the ancient city of Luang Prabang, a famous tourist site which was included in the UNESCO World Heritage List in 1995. This also brought much attention and drew the interest of many tourists to visit Luang Prabang. Before the tourism industry bloomed, the economy of Luang Prabang was mainly based on agriculture. Tourism

development brought another source of income for inhabitants such as selling handicrafts and other local products to tourists. Tourism development created new job opportunities in Laos. The World Travel and Tourism Council (WTTC) announced that tourism development created 145,500 jobs or 6% of total employment in Laos in 2003. It also estimated that tourism would create 269,000 jobs or 9 % of total employment in Laos by 2013. Some residents in Luang Prabang sold their homes and farming land to engage in tourism-related businesses without any experiences. Tourism industry is very sensitive, unpredictable and above all, seasonal. The new local entrepreneurs without any experiences of doing business at all especially in the tourism industry did not succeed in tourism-related business and they had a severe difficulties in eking out a livelihood.

## **2.3 An Overview of Lacquerware Business in Thailand and Laos**

### **2.3.1 Lacquerware Industry in Thailand**

Lacquerware is a special traditional form of handicraft which has been used in Lanna, northern Thailand since the 12<sup>th</sup> century. In northern Thailand, traditional lacquerware products are called “Kreung Kheun.” Lacquer, which is actually the sap from *Melanorrhoea usitata* tree, is issued especially for covering and creating water resistance of household utensils and to decorate objects which expressed traditional and cultural beliefs. Chiang Mai and its periphery areas are famous for lacquerware production. Lacquerware products were sent to not only the domestic market but also to the export market. At the end of WorldWar II, there was a crisis for traditional artisans in Thailand as they had difficulties in earning enough money to live. Thai economy was changed abruptly, moving from a traditional agriculture-based one to an industrial-based one. This caused negative consequences especially for the rural population. Most farmers who worked in traditional crafts did so as a part-time job and could not earn additional income. This was because many hand-made lacquerware utensils were now replaced by mass industrial production of lacquerware products. The advantage of mass production of lacquerware by machines is the capacity to provide a low sales price. So, hand-made lacquerware automatically

became high priced, affordable to only the elite few. Although the craftsmen had adequate knowledge of making high quality hand-made lacquerware, the market demand for daily use utensils was decreasing day by day as these items were not popular. Instead of utensils, the function of lacquerware is now transformed into being used as a form of home decoration. But, in addition to this, in Thailand, lacquerware continues to be used as part of the religious paraphernalia at special occasions such as religious events and ceremonial affairs. The best regular customers of Thai lacquerware then continued to be Buddhist monks who regularly ordered not only new lacquerware products but also repaired their antique lacquerware (Lillehoj, 2004, p. 138). Today, there are many problems with the lacquerware industry in Thailand especially the decline in new craftsmen as the existing skills cannot be passed down to the next generation because of lack interest of the younger generation to pursue this. The time consuming efforts of making lacquerware products simply does not match the income it provides. Limited knowledge, lack of support for new designs and scarce raw material especially requiring expensive imported sap are some of the main barriers for the sustainability of the Thai lacquerware industry. Moreover, the existing situation has been gradually exacerbated by the influence of other cultures and the effects of globalization (Voharn, 2014, pp. 38-61).

### **2.3.2 Lacquerware Industry in Laos**

Traditional arts and crafts were in danger of extinction in Laos. Efforts to regenerate the arts and crafts were started in the late 1990s to enjoy benefits from the increasing demands of tourism. The night market in the ancient city of Luang Prabang was famous for local handicraft and lacquerware because women from peripheral areas came and sold their hand-made handicrafts for many years. Unfortunately, cheap souvenirs and clothing as well as fake antique jewelry have replaced handicraft and lacquerware as the products of choice in the tourist markets. In addition, local handicraft and lacquerware souvenirs sellers also deceived tourists by selling low quality products imported from China. So, even tourists who did find genuine handicraft were confused about the quality of products (Starin, 2008, pp. 639-652). In the last few years, the Luang Prabang Handicraft association tried to combat

that problem by introducing a new initiative in order to maintain the genuine quality of traditional handicraft. Handicraft industries are one of the most successful tourism-related businesses in Luang Prabang because handicraft souvenirs are popular. Tourism also helps with the export of handicrafts. But, an interesting finding was that bringing in new ideas and creating new handicraft products did not bring much benefit to the community. Foreign investors or businessmen from Vietnam were involved in this handicraft business and local people did not get much economic benefits. Because of a lack of vocational training and other capacity building training, local people did not have high skills and thus could not get other well-paid jobs in tourism field. Moreover, because of low skills, local people could not improve their tourism-related business opportunities. So, it could be concluded that although tourism creates many job opportunities with reference to national statistics, local people who had low skills could only get low-paid jobs in practice. Moreover, foreign investors enjoyed much economic benefit from handicraft and other tourism-related business in Laos which did not spill over to the local communities. It is said that social change in the community in Laos is difficult to understand and it is a complex process (Asia, Management, & Hawaii, 2004, pp. 59-63).

#### **2.4 Lacquerware Industry in Danger of Extinction**

Lacquerware handicraft is one of the most ancient cultures in Asia, originating in China several thousand years ago. The traditional objective of lacquerware was to protect wooden or woven bamboo from humidity and insects. When China traded with other countries in Asia, this technique spread throughout Asia. Lacquerware used to be utilized as utensils of daily living in most parts of Southeast Asia. However, the impressive heritage of the craft is now under threat of disappearance. Although there are many books describing the beautiful art and photos of lacquerware, these books are just descriptive and just remind people of the refined magnificence of lacquerware. The main causes of the slow death of the industry are low demand, the declining skilled labour force in this industry and the decreasing numbers of the younger generation who want to join lacquerware training and a career in the industry (Lillehoj, 2004, pp. 5-6).

In Japan, lacquerware has nearly disappeared since 19<sup>th</sup> century because of industrialization. In other Asian countries, this phenomenon had increasingly crept in during the early 20th century, partly because this is a labour intensive and time consuming craft. So, it is deemed to be unfit to survive in the modern day. Industrialization, a scarcity of sap from trees and the lack of interest of the younger generation to join this industry are some of the major threats to the extinction of lacquerware. Almost all lacquerware experts agree that lacquerware is under the threat of disappearance at the conference of lacquerware experts in Myanmar in 1996 and; they all agreed to make extensive records of lacquerware craft techniques. The immense demand of the lacquerware market in import countries can cause the disappearance of lacquerware culture and design of the original exporting country. Because of the high prices and low domestic demand of lacquerware, developing countries try to export to other countries. But, in order to make their products palatable for their export market, the country often has to change their designs. This causes, in the long run, an extinction of traditional culture and design of lacquerware in developing countries (Lillehoj, 2004, pp. 20-21).

Another threat to the industry is that of producing low quality products, as can be seen in the Liangshan area in China. There has been some increased demand for lacquerware because of tourism. But, the market is very limited in the Liangshan area and the high price of lacquerware cannot compete with other cheap, mass-produced ceramic items. In an open market, these cheap ceramic products make sure that there is no choice but to also offer lacquerware at low prices to be competitive. This goes a long way in contributing to low profit or even at times; losses for the lacquerware producer. So, to compete in this price-driven market, the lacquerware producer uses a synthetic resin varnish. The quality of lacquerware with synthetic resin is not good and; is very much different with natural and traditional lacquerware products. It affects the quality of the art form and will lead to the end of sophistication and refinement of lacquerware art. So, for the sustainable development of lacquerware, consumers who can afford high prices are essential (Lillehoj, 2004, pp. 79-98).

## 2.5 Lacquerware Industry in Myanmar

### 2.5.1 History of Myanmar Lacquerware

Lacquerware craft was introduced in Myanmar since Bagan Period (11<sup>th</sup> to 13<sup>th</sup> century). Some schools of thought say that the technique of making lacquerware in Myanmar came from China. Another school of thought claims that the origin of lacquerware techniques came from Thailand. Lacquerware craft is one of the ten traditional arts and crafts in Myanmar. In Myanmar, the technique of making lacquerware spread from Bagan to Maungdaung, Budalm, Kyuk-ka in Sagain division, Tada-U, Amarapura, Inwa in Mandalay division, Kyaington in Shan State and Bago in Bago division. The basic structure of lacquerware is a frame, made from woven bamboo, wood and horsehair; coated with a lacquerware resin. Lacquer-coated articles can last as long as 1,000 years. There are six different basic types of Myanmar lacquerware. These are: plain lacquerware (Kyau-Ka); incised lacquerware (Yun); gilt lacquerware (Shwe-Zawa); relief-modeled lacquerware (Tha-Yo); glass mosaic and gilt lacquerware (Hmansi-Shwecha); and dry lacquerware (man or manhpaya) (Lillehoj, 2004, pp. 183-185). Among them, incised lacquerware (Yun) and gilt lacquerware (Shwe-Zawa) are special products of Bagan. The core of various containers is made from woven bamboo strips, coiled bamboo and horsehair. A fine iron stylus (kauk) is used for engraving yun lacquerware. Sketches are drawn on the plain lacquerware by men with freehand drawing techniques. Dyeing and polishing are made by women at lacquerware workshops in Bagan. Four main basic styles of Myanmar traditional drawing, designed utilizing Pali script, are applied in lacquerware decoration. The “Kanou” style depicts convoluted lotus stems, buds, blossoms, or scroll work with floral motifs or arabesques. Any beautifully floral drawing or intricate design may be called “Kanou”. “Kapi” depicts apes, monkeys and the like, and action and movement portrayed in a drawing may be called “Kapi”. “Gaza” depicts elephants, horses, cattle or any massive objects such as mountains, rocks or tree trunks, and “Nari” depicts human figures. There is no perspective in ancient Myanmar art. The required effect is achieved by means of lines and colors. The artist draws a design with freehand to express an idea. Motifs commonly used

are lotus, orchids, mythical animals, demons and divas. Favorite symbols are the nine planets and the twelve zodiac signs. Scenes and episodes from the Jatakas (birth of the Buddha's stories), well-known folk tales and fables, pagoda legends and spirit (nat) stories are depicted in panels (Lillehoj, 2004, pp. 176-181).

### **2.5.2. Lacquerware Business in Myanmar**

Prior to the colonial period the art of making lacquerware was widespread in Myanmar, with thriving gold leaf (Shwe-Zawa) workshops at Pyay in lower Myanmar and vibrant lacquerware box-making industries at Sa-Le and the main center of incised lacquerware (Yun) at Bagan in central Myanmar. Lacquerware products such as luxury articles for the palace and monks to daily use utensils for the ordinary people were produced. Skilled lacquerware artisans had an honoured place in traditional Myanmar society and were widely respected for their skills (Fraser-Lu, 2000, p. 188).

British rule in Myanmar brought profound changes to the traditional handicraft industry. Colonialism did not generally recognize local crafts, which were widely regarded as irrelevant to economic advancement. Moreover, traditional handicraft utensils could not compete with cheap mass-produced crockery, metal wares and plastics which were flooding local markets throughout the country. As a consequence, many young people left family handicraft workshops for largely unskilled, but more lucrative occupations created by a colonial extractive economy. During British times, the Department of Cottage Industries tried to preserve some traditional occupations in an effort to relieve rural poverty and unemployment. Because of the strong demands of Bagan lacquerware craftsmen, the Government Lacquerware School was established in 1924 to improve and preserve traditional lacquerware art (Fraser-Lu, 2000, pp. 188-189).

During the post-colonial period of 1948-1962 in Myanmar, the parliamentary democracy government brought good fortune for the country's economy including traditional handicraft. But, there was a military coup in Myanmar in 1962. From



1962, under the isolation of the military government, the majority of crafts were reorganized into cooperatives and placed under the Ministry of Cooperatives or one of the various industry corporations which assumed responsibility for the procurement of raw materials and the marketing of the finished products. An endemic shortage of money, raw materials, experienced personnel, and a lack of export outlets greatly hindered the development of small scale handicraft industries including lacquerware. For the lacquerware industry, insurgency problems in the Shan states made raw lacquer difficult to collect and increasingly more and more expensive. Moreover, the lacquerware market could not rely on the tourism industry in those days because of very few tourist arrivals as a result of too strict and unfavorable rules and regulations for the tourism industry (Fraser-Lu, 2000, pp. 191-192).

In 1988, when the “State Law and Order Restoration Council” seized power, lacquerware craftsmen in Bagan suffered a lot because the new government built a new Bagan town which was a few kilometers to the south of old Bagan. There was no public infrastructure, water or transportation in new Bagan town. Moreover, the inhabitants had to build their houses themselves. The government did not provide anything. Many former lacquerware workshop craftsmen faced difficulty not only in building their new houses but also in establishing lacquerware workshops. Their capital was insufficient. A number of well-known senior lacquerware entrepreneurs and craftsmen felt depressed from the abrupt change of their life and forced relocation. Most of them were depressed enough to die as a result of this turmoil. As a result, there was a vacuum in leadership and a lack of direction in the lacquerware industry (Fraser-Lu, 2000, pp. 192-193).

Today, in Myanmar, there are more than one hundred lacquerware workshops producing daily utensils, interior decoration, souvenirs, and religious objects. The customers come from all over the world and their tastes are different. Generally, the most popular type of lacquerware is that of traditional design lacquerware decorated with gold leaf. Roughly, there are about 2,500 lacquerware craftsmen all over Myanmar and about 60 percent of them live in Bagan. There are at least ten main companies exporting lacquerware in Myanmar. In Bagan itself, most of the

households in Myin-Ka-Bar village produce, retail and export lacquerware. The Myanmar government organized a host of tourism-based activities in conjunction with Visit Myanmar Year in 1996. At that time, tourists could buy lacquerware from registered shops and bring them back abroad (Lillehoj, 2004, p. 185). Moreover, there were many pagoda festivals during the whole year throughout Myanmar. These pagoda festivals were also one of the promising venues for lacquerware to be sold in their open markets. In addition, Lacquerware could be sent to wholesale markets in Yangon and Mandalay (Lillehoj, 2004, p. 190).

### **2.5.3 Threat to the Extinction of Kyauk-Ka Lacquerware Industry in Central Myanmar**

Kyauk-Ka in central Myanmar is another famous place of lacquerware production after Bagan. But, there are no tourist attractions in the areas surrounding Kyauk-Ka. Although the Bagan lacquerware industry had been promoted by tourism development, the Kyauk-Ka lacquerware industry was been in danger of extinction. The three main causes of threatening extinction were: scarce and expensive raw materials, decrease in labour force and low demand for finished products. Although they could get raw materials at high prices, their main difficulty was that they could not get high prices for their products to cover their expensive input costs. The nature of making lacquerware is labour intensive. Without any interval, it takes at least three months to finish one piece of lacquerware craft. Labour shortage is another critical deficiency hastening extinction. The problem was that making lacquerware is not a well-paid job compared to other jobs. Although craftsmen worked the whole day, they got only minimal subsistence wages. Compared to this there were other far better-paying job opportunities in Kyauk-Ka. Overall, there is no incentive, excitement and motivation for younger generation to join the lacquerware industry. The most severe threat is that there was no good market and the presence of the young generation who will train and inherit the knowledge of lacquerware craft (Lillehoj, 2004, pp. 187-190).

## **2.6 History of Nyaung-Oo District and Development of Tourism**

The city of Bagan was upgraded and formed by the Ministry of Home Affairs on 25<sup>th</sup> September, 1973. People used to live near the ancient pagodas in old Bagan. In 1988, the State Law and Order Restoration Council (SLORC) seized state power and people living near ancient pagodas in old Bagan were forced to relocate to the new Bagan town which is a few kilometers south of old Bagan. Old Bagan where most of the ancient pagodas were located and new Bagan town where people lived are not far from each other. Only one name; Bagan, was used for both the old Bagan and new Bagan towns. Nyaung-Oo is another town which is located a few kilometers north of old Bagan. Bagan was placed under Nyaung-Oo Township and the township was upgraded to the district level on 4<sup>th</sup> April, 1996. Nyaung-Oo district was formed with 16 quarters and 75 village tracts. Most of famous cultural monuments were located across Bagan city. However, the tourism industry was also developed in Nyaung-Oo city (TDC, 2013).

After Nyaung-Oo had been upgraded to a district level and “Visit Myanmar Year” had been declared in 1996, the tourism industry developed. There were nearly 300,000 people living in the township with a proportion of about 25% living in the urban area. Of the population in terms of percentage of employment, 11% work in agriculture and 2% worked in manufacturing. It is found that since the township was designated as one of the tourist zones in Myanmar, the majority of the inhabitants worked in the tourism industry and tourism-related businesses. There is a Lacquerware Technology College and museum which supports the tourism industry in the township. The agricultural sector is developed in the rural area and edible oil is abundant in the Nyaung-Oo district. The government has supported tourism-related infrastructure in the township. For example, development of the transport system is extensive and there are many highways leading to Bagan as well as a good network of roads and streets in the township. Tourists also can come and visit Bagan by train. An international airport was built and both local and regional airlines fly into Bagan, allowing a good method for tourist transport. Moreover, the town governmental departments have organized and enabled distribution of both drinking water and water

for agriculture use. Therefore, there is adequate water in the township; and there will be no scarcity of water even if the tourism industry expands significantly. Although government supports the provision of electric energy, there is a need of electricity and infrastructure for electricity in the township. New hotel projects are being implemented in certain development zones in Bagan to cater for the higher tourist arrivals (TDC, 2013).

It is clear that tourism industry is more developed in Bagan than that of other tourist destination sites in Myanmar because it possesses major tourist attractions of over 2000 ancient pagodas as well as government support for the tourism sector. In spite of the potential of tourism development in Bagan, boycott campaigns and international sanctions on military government after 2000 negatively affected tourism industry in Myanmar. As a result, the inhabitants in Bagan including lacquerware craftsmen who relied on the tourism industry had difficulty to sustain their livelihoods. Myanmar democratization in 2011 led to record-breaking numbers of tourist arrivals. Therefore, people in Bagan could make their fortunes again after 2011 in line with the development of tourism. Sustainable tourism planning in Bagan is vital for the livelihood of its inhabitants. It is urgently needed to relieve the inhabitants from unsecure and unhealthy economic condition which will at some point become catastrophic.

To summarize, in this chapter, main concept of tourism, tourism industry in neighbouring countries, an overview of lacquerware business in Thailand and Laos, lacquerware industry in danger of extinction, lacquerware industry in Myanmar, history of Nyaung-Oo District and development of tourism were discussed. In next three chapters, main findings of research will be discussed. The last sixth chapter is about conclusion and recommendations.

## **CHAPTER III**

### **THE IMPACT OF TOURISM ON BAGAN LACQUERWARE INDUSTRY**

In this chapter, two main research questions are answered which are: (1) What are the changes of lacquerware industry before and after 2011? and; (2) What are the impacts of tourism on the socio-economic development of people in the Bagan lacquerware industry? The following sections illustrate in detail the answers to these two questions and help give the reader a deeper understanding of this.

To answer these two research questions, the following titles are discussed in this chapter: the development of tourism in Myanmar, important new government measures for tourism, an overview of Myin-Ka-Bar village, the process of making lacquerware, the changes of lacquerware industry in Myin-Ka-Bar village before and after 2011, the emergence of small lacquerware workshop-cum-shops, the emergence of small family lacquerware enterprises, the role of middlemen in the lacquerware market, changing of production trend in big lacquerware shops, the nature of lacquerware shops, lack of new generation joining lacquerware industry, the experience of a tour guide in a lacquerware market and the role of government for the sustainability of lacquerware industry.

#### **3.1 The Development of Tourism Industry in Myanmar**

The tourism industry in Myanmar was not fully developed before 1988. Tourism in Myanmar is directly connected with the political and economic system of the State. It has become common to describe Myanmar's post-war economy in three chronological segments-period of parliamentary democracy (1948-1962), socialist period (1962-1988) and market-oriented period (since 1988). The timeline of the Myanmar tourism industry therefore can be traced back according to these segments. During the parliamentary period, since Myanmar economy was capitalist-oriented, there were several private local tour and travel operators as well as privately owned

hotels in Yangon and other large cities all over the country. The Tourist Information Service (TIS), the tourism branch of the Union of Burma Airways (UBA) took responsibility to cater for the tourists visiting the country at that time. Later the Burma Economic Development Corporation (BEDC) set up a branch called “Tourist Burma” and the TIS was incorporated into this setup. The tourism industry in Myanmar developed alongside the development of the hotel industry in Myanmar. The first modern hotel in Myanmar was the “Strand Hotel” built in 1901. After the Second World War, many modern hotels were built. Some of the hotels were privately owned and some were owned by foreigners. During this period of time, tourist visas were valid for one month.

After the Revolutionary Council took over the power of the State in 1962, the validity of entry visas was reduced to just 24 hours and the number of tourists drastically reduced. In 1964, Tourist Burma was taken over by Corporation No 20 under the Ministry of Trade in accordance with the nationalization law of the socialist regime. All hotels were also nationalized and handed over to the Ministry of Trade. In 1971, the Tourist Information Service (TIS) and the Tourist Burma were amalgamated as the Hotel and Tourism Corporation under the Ministry of Trade. The business of tourism during this socialist period was not commercially successful because the policy guiding tourism was slanted towards safeguarding the traditional values and customs of the nation from foreign influence.

In September 1988, the State Law and Order Restoration Council (SLORC) which was later renamed as the State Peace and Development Council (SPDC) took over the administration of the state, adopting a market-oriented economic system. Many economic reform measures introduced during the late 1980s and immediately bore fruit by the early 1990s. Participation of the private sector in the economy was increased, and so was the situation in the tourism industry.

The SLORC made efforts to expand its economic base and made tourism a priority by passing the Myanmar Tourism Law in 1990. The Ministry of Hotels and Tourism was set up on 28, September 1992. The Ministry had encouraged the private

sector, both local and foreign to make investments and opportunities for tourism development and investment opportunities were created on a large scale in the industries for private entrepreneurs. According to the Myanmar Hotels and Tourism Law, 1993, the Ministry issued the following licenses to the private entrepreneurs. The enterprises and businesses are as follows:

1. Tour Enterprise
2. Tourist Transport Business
3. Hotel and lodging-House Businesses
4. Tour Guide Businesses

In addition, having recognized the role of Public-Private Partnership, the Ministry of Hotels and Tourism initiated close cooperation with the following organizations:

1. The Union of Myanmar Travel Association (UMTA)
2. Myanmar Hoteliers Association (MHA)
3. Myanmar Marketing Committee (MMC)

The number of international tourist arrivals in Myanmar was 21,000 in 1990 as soon as the market oriented economy was introduced. The number of tourist arrivals increased little by little and it reached 172,000 in 1996 because of promotional efforts of Myanmar tourism which culminated in Visit Myanmar year 1996. The initial tourist arrivals of Myanmar in 1990 were not very high and the growth rate of tourist arrivals was not very high until 2000. The tourist arrivals fluctuated around about 200,000 in the 1990s (Talwar, 2006, p. 33). After 2000, the number of tourist arrivals had increased a little although there were many campaigns urging a boycott against visiting Myanmar. But, the increase of tourism was not significant.

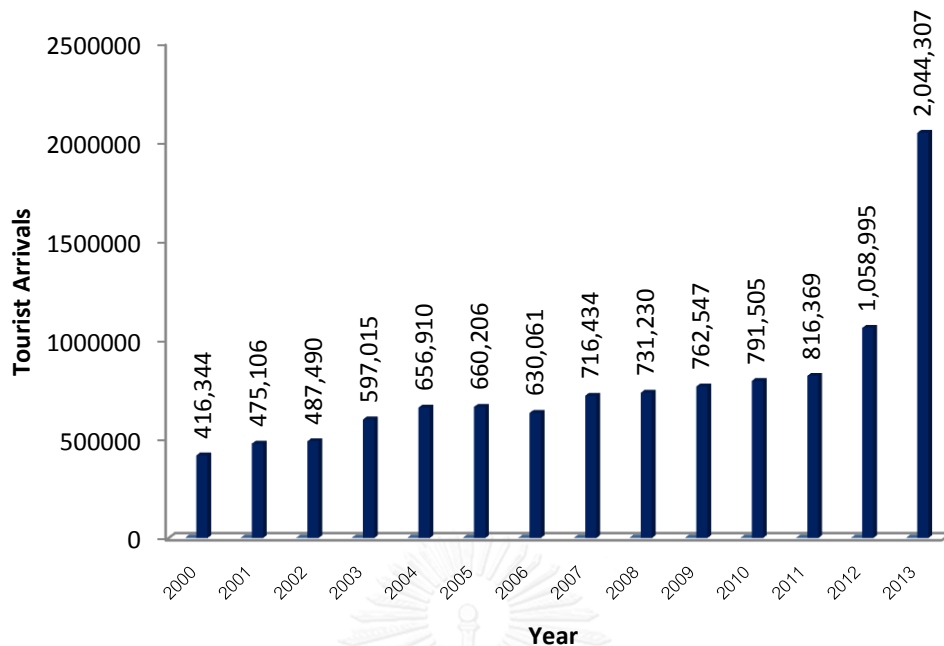


Figure 3 No of tourist arrivals in Myanmar from 2000 to 2013

Source Ministry of Hotel and Tourism, Myanmar

Myanmar is rich in natural and cultural resources. Although Myanmar is situated at a strategic crossroads between South and Southeast Asia and has an abundant labour force, the rank of Myanmar was 147 out of 187 countries by the current Human Development Index of UNDP. The individual contribution of GDP in 2012 was \$ 900 which was the lowest one in ASEAN countries (Tourism Master Plan in Myanmar (2013-2020), June, 2013, p. 3). The gap between the rich and the poor continues to widen in leaps and bounds. Although the new democratic government has tried to improve the socio-economic wellbeing of citizens, there are not many improvements over the past three years except some allowance of human rights such as freedom of expression and association have been granted to the populace. Because of the immediate change in political system and its abundant richness in natural and cultural resources, the interest of the international society on Myanmar has increased. Along with this, tourist arrivals has also increased in small part suddenly for many reasons such as leisure, business, especially explorations about the country which has been under military rule for over half a century. The new government has seized this



opportunity and made plans to improve the tourism industry as one of the means for poverty reduction. The government made a new FDI law to attract foreign investors in both energy and tourism sectors. The number of tourist arrivals has significantly increased in comparison with that of the previous military government time. There is also a lot of potential growth in Myanmar not only in the tourism sector but also in the agriculture and other industrial sectors. But, how much benefit of this growth will go towards the poor is uncertain and questionable.

### **3.2 Important New Government Measures for Tourism**

The democratization of Myanmar in 2011 was an important moment in the country's history. Many reforms and regulations were made to improve tourism and allow FDI under the new government. The new government laid down the framework for economic and social reforms. The immediate priority of this framework is infrastructure projects to improve the network of roads and transportation. This will indirectly support the tourism sector because tourist can rely on not only air lines but also land transportation.

As one of its priorities, the new government tried to improve civil aviation system. In Myanmar, there are 69 airports today including 3 international airports in Yangon, Mandalay and Nay Pyi Daw. There are 19 international airlines and 4 domestic airlines operating regular domestic and 17 regional destinations. The Myanmar Department for Civil Aviation (DCA) tried to double the capacity of Yangon International Airport from 2.7 million passengers a year to 5.5 million a year. In addition, the government tried to also upgrade the existing domestic airport to become an international airport in order to accept more international tourists. The DCA has already announced to re-develop the international airports in Yangon and Mandalay through Public Private Partnership (PPP) and a new international airport will be built at Hanthawaddy about 80 km from Yangon. The new Myanmar government has also tried to develop a Civil Aviation Master Plan with the technical support from the Japan International Cooperation Agency. In addition to road and airline infrastructure, the government has tried to implement hotel zone projects at

Yangon, Mandalay, Nay Pyi Daw and other famous tourist destination cities, preparing to serve high tourist arrivals in future. Another infrastructure improvement after 2011 is in the telecommunication sectors. The sector was monopolized by state-owned enterprise before 2011. The government tried to improve it by inviting foreign investors in these days (Fujii & Ramamurthy, 2013). Apart from infrastructure development, another important measure to attract tourists is the deregulation of visa system.

The new government initiated e-Visa system on 1 September, 2014. E-visa is allowed for tourist visas only, as a measure intending to develop tourism sector. E-visa allows a person single entry of up to 28 days. Tourists who take e-Visa must come through three international airports: Yangon, Mandalay or Nay Pyi Daw. The government intends to improve gradually other types of visas and entry points. In future, the government has a plan to expand e-Visa service to include four main entry points along Thailand-Myanmar border: Myawaddy, Tachileik, Kawthaung and Htee Khee. The government also allows Visa On Arrival (VOA) for tourists from specific 20 countries including European Unions and America. VOA also allows a 28 day stay in Myanmar (MIP).

Another important measure to attract FDI and international tourists is the deregulation of foreign exchange rate. Before 2011, there were multiple exchange rates and an active illegal foreign exchange market in Myanmar. Those multiple exchange rates were replaced by an official managed float system using formal interbank foreign exchange market. Moreover, many official exchange centers were established at airports and tourist destination cities (IMF, 2012). So, international tourists do not need to rely on the illegal exchange market. They can trust the official floating exchange rate and it became one of the important factors to attract more tourists to visit Myanmar.

To sum up, the number of tourist arrivals has significantly increased in comparison with that of the time of the previous military government. Tourists want to visit and observe the country which was out of touch with international society for

a long time. The deregulation of visa system, the setting up legal floating foreign exchange rate and official exchange centers and the improvement of infrastructure attracts more tourists to visit Myanmar. There is also a lot of potential growth in Myanmar not only in the tourism sector but also in the agriculture and other industrial sectors.

### **3.3 An Overview of Myin-Ka-Bar Village**

Nyaung-Oo town and Bagan are both towns administratively posted under the Nyaung-Oo district. Myin-Ka-Bar village is between Nyaung-Oo town and Bagan town. It is 11km away from Bagan town and 18 km away from Nyaung-Oo town. It is situated near some of the famous historical monuments in Bagan. There are altogether six quarters in Myin-Ka-Bar village. The main road which links Nyaung-Oo and Bagan passes through the center of the village. So, the houses and shops on the main road have good opportunities to conduct tourism-related business. The village is very big and it is easy to lose one's way in the labyrinth of the streets in the village. So, most of the tourists pass the main road at the center of the village and drop by to visit the shops on the main road.

Myin-Ka-Bar village is the heart of production for lacquerware products in Myanmar. This village is famous for its lacquerware industry. There are over 800 households in this village and the total population is over 4,300. Amongst the total population, children and youth under 18 years old are about 1,300 and elder people above 18 years old are about 3,000. Among the 800 households, 80% of households are related with lacquerware industry and lacquerware-related businesses. Almost all households have small lacquerware enterprises since the development of the tourism industry in 2011. Big lacquerware workshops request small lacquerware enterprises directly to make specific products. If there is no order from big lacquerware shops, small lacquerware enterprises make lacquerware themselves namely those which are popular items and easily sellable in the market. Owners of small lacquerware enterprises have to invest a lot by themselves for the raw materials to make their products. When they finish making their products, they contact middlemen to

distribute their products and often have to give him 10% of the sales. Owners of small enterprises in the village rarely sell their products to the big lacquerware shop directly. Some craftsmen who work at big lacquerware workshops make their own lacquerware souvenirs by themselves at night when they come back to their homes. They say that it is like saving money. The wages they earn from the big lacquerware workshop is enough for their daily needs. They can then supplement their income by selling these made-at-home pieces which act as a form of savings for them.

### **3.4 The Process of Making Lacquerware**

Lacquerware cannot be made by only one person. It needs division of labour. Lacquerware has four different stages such as frame making, coating, drawing design (sketch), filling colour and polishing. It takes at least three months to a maximum of two years to finish one lacquerware souvenir. There is no gender discrimination in lacquerware industry. Men and women can work together. So, there are more job opportunities in the village. Men mostly make frames with bamboo or wood. These frames are coated with many layers of resin (Thit-Si in Myanmar). Small souvenirs such as bowls, cups and trays need 10 to 15 layers of coating resin. For large lacquerware furniture items such as a cupboard or a table, often 20 to 25 layers of coating resin are needed. Each layer of resin needs to be put in an underground cellar to dry with minimal humidity. Every layer needs 3 to 5 days to dry. When the final coating is finished, men draw sketches (designs) on lacquerware. The women color and polish the sketches. Tourism development contributes to the increased demand for lacquerware souvenir, leading to more job opportunities for both men and women in the lacquerware industry especially since 2011. A large amount of lacquerware souvenirs cannot be made in one sitting because all the processes are hand-made and it takes a long time to finish one product.

Up to this day in Myin-Ka-Bar village, no one is able to complete all the whole four stages by him or herself. Each craftsman has their own professional skill. They have to know some of the parts of the work of other people but, they are

professionals only at one stage. In a small lacquerware enterprise, if they cannot make the other stage of the process, they have to request other people to make it by paying them depending upon the piece of work. Moreover, among the four stages, drawing design on lacquerware by using fine iron stylus (Kauk in Myanmar) with freehand is the most difficult one. It takes at least five years to be professional at this stage of drawing design. Other processes of making lacquerware take time from one to two years to become professional at. Even till this day, there are only a few professional designers in Myin-Ka-Bar village.





1. Making frame with bamboo



2. Coating many layers with resin  
(Thit-si inyanmar)



3. Putting underground cellar to dry with humidity



4. Drawing sketches (design) with free hand



5. Filling colour and polishing by Women

Figure 4 The process of making lacquerware

Source Field Survey

### **3.5 The Changes in the Lacquerware Industry in Myin-Ka-Bar Village Before and After 2011**

There were big changes in the lacquerware industry in Myin-Ka-Bar village in comparison before and after 2011. Bagan is one of the most famous tourist sites in Myanmar and most of the tourists who visit Myanmar definitely visit Bagan as part of their sightseeing. So, tourist arrivals to Myanmar highly influenced the livelihood of the community of Bagan because most of the inhabitants in Bagan are working in tourist-related businesses and service industry. Before 2011, Myanmar had never experienced one million tourist arrivals. So, the business situation in Bagan was also not very good. Moreover, the tourism industry is very sensitive. In the years before 2011, very few tourists visited Bagan because of the political unrest in the country. But, the unexpected Myanmar democratization in 2011 began to attract the international community as the country was opening up after it had been ruled by the military regime for over 50 years. It can be said that the more tourist arrivals in Myanmar, the better business opportunity in Bagan. Lacquerware is the most famous and popular souvenir in Bagan. So, the significant increase in tourist arrivals contributed and will continue to contribute to the high demand for lacquerware souvenirs in Bagan.

A lacquerware craftsman said that:

“I learnt lacquerware-making at my small family enterprise. I had to learn lacquerware when I was a teenager. During my father’s time, lacquerware industry was not very good. People worked at other livelihood activities. The business was just enough to fulfil basic needs at that time. So, parents could not send their children to school. After primary school, most children had to learn lacquerware making in their homes or at other lacquerware workshops. Previously, people at four quarters (sections) out of six quarters in Myin-Ka-Bar village did lacquerware business. Now, almost every house in the whole village does lacquerware business because of tourism development after 2011.”

Moreover, he added that

“Last year (2013) was the highest sale for lacquerware souvenirs in my life. I have never experienced (such a big amount of sales) like that before. Almost all the lacquerware products in big lacquerware shops were out of stock. The owners of big lacquerware workshop had to look for and buy whatever lacquerware souvenirs they could find in small enterprises in the village. The small enterprises in the village did not have anything to sell. They were also out of stock.”

So, it can be clearly seen that tourism development creates job opportunities in the village. There was no tourism business in Bagan before 1996. At that time, the lacquerware industry had to rely on only local markets for purchasing daily utensils and souvenirs. They have to sell lacquerware at the pagoda festivals. In 1996, the Myanmar government encouraged tourism by holding “Visit Myanmar Year, 1996”. As soon as tourism was introduced in Bagan, lacquerware business boomed. During 1996-2000, tourism business was good in Myanmar. After 2000, the boycott campaign announced that the benefit from tourism directly supported the military government and thus many tourists did not even come to Myanmar (Hanne, 2008, p. 34). The tourism industry became insecure and unreliable for the local community in Bagan. In Myanmar, it was already an issue that tourism only had its peak season in October, November, December, January and February. Most of the inhabitants in Bagan had difficulty for their livelihood during the rest of the 7 months of summer and raining season in Myanmar. Another threat for the people could also be imposed through an overdependence on tourism since tourist numbers react very sensitively to political instability and might also fall due to boycott campaigns. Bagan, for instance, has developed a major tourism industry and most of the local workforce is directly or indirectly involved in the tourism sector. Therefore, an overdependence on tourism could prove to be risky considering the country’s political instability and rise and fall of tourism numbers (Hanne, 2008, p. 40).

After 2000, when tourism was not very good, some traders from Myawaddy came to Myin-Ka-Bar village to buy and send lacquerware souvenirs to Thailand.



Lacquerware craftsmen at Myin-Ka-Bar village could rely on that market for nearly five years from 2002 to 2007. Unfortunately, they have to sell low quality lacquerware with cheap price to Myawaddy market. So, they modify other techniques to fulfill the market demand. Myanmar tourism face the worst period during the 2007 Saffron revolution. At that time, craftsmen in the lacquerware industry at Myin-Ka-Bar village had to work other jobs such as illegal gold finding near ancient pagodas and working at construction sites. Moreover, most of craftsmen migrated to other places to work other informal jobs. Skillful craftsmen who work at big lacquerware workshops were able to survive in those days due to having jobs at the big workshops. Lacquerware souvenirs in Bagan are famous for its design and manage to survive because of international tourism.



### 3.6 The Emergence of Small Lacquerware Workshop-cum-Shops

After facing its worst trials between 2007 to 2010, the lacquerware industry in Myin-Ka-Bar began developing again together with tourism development contributing to high demand. Nearly all households established small lacquerware enterprises although they could not sell their products directly to the tourists. Small lacquerware shops also emerged after 2011.



Figure 5 Diamond Arrow Restaurant and Lacquerware workshop on the road side of the village

Source Field Survey

Among small lacquerware shops, two new lacquerware shops established in 2012 were of interest. Those two new lacquerware shops were opened up because of

tourism development and high demand of lacquerware souvenirs after 2011. One small lacquerware shop is called the Diamond Arrow lacquerware shop which is a stand-alone building attached with a restaurant (lacquerware-related business) while the other is another small lacquerware shop called Jasmine.

Ko Soe Moe Thet is the owner of Diamond Arrow lacquerware shop and restaurant. He initiated the idea of running together lacquerware shop and restaurant which is lacquerware-related business. He established this shop on July 2, 2012. Both local and foreigners visit his shop. He said that,

“I have no network and connection with tour companies. My main customers are free and individual tourists (FITs). FITs don't hire tour guides. They travel themselves with their own plan. Tourists who buy the package tour service from the tour companies have tour guides who bring them to only big lacquerware shops. FITs come to my shop at lunch time for lunch at the restaurant. After eating lunch, they observe lacquerware at the shop”

So, this is a very good and creative idea to attract tourists. Despite him having no networks and connections to attract group tours as well as package tours, he seems to be doing well in attracting customers. This is the only small shop on the road side in Myin-Ka-Bar village which attracts tourists in a different way. Other people could not engage in this strategy because the price of the land on the road side is beyond the capacity of small entrepreneurs. Ko Soe Moe Thet said that this yard on the road side belongs to one of his close relatives thus he is able to rent this land at a cheap price and build the building by himself. So, he could afford to run his business like this. Otherwise, if he has to rent with high price of land or shop on the road side, he cannot afford it.

Like other tourism-related businesses, there are only a few customers in that shop during the low seasons of tourists in summer and raining season in Myanmar. He said that he can mainly provide lunch catering for tourists because Myin-Ka-Bar village is near Bagan town but there are no hotels in Myin-Ka-Bar village that tourists

can eat at. After sightseeing, tourists return to their hotels and eat their dinner at hotels or other restaurants in Bagan but they do not want to return to their hotels at lunchtime. Mostly, they do not come out again at dinner so lunch is the only opportunity to get a hold of them.

Ko Soe Moe Thet also said that,

“I have been working in the lacquerware business since 2002 at my own workshop. At that time, I could not run the lacquerware shop like this. After making lacquerware souvenirs, I sent my products to traders in Mandalay and Yangon. I made good quality lacquerware products but I could not sell directly to the tourists. The big lacquerware shop in Bagan would not pay the price that was worth for my products. But I did not want to make low quality products. So, I could not sell my products to the big lacquerware shops in Bagan at such a low price”

Although he runs the shop at Myin-Ka-Bar village, he is still sending his products to traders in Yangon and Mandalay. He said that the benefit of running the shop is that he has got another network of new traders in Yangon and Mandalay. As afore-mentioned, both local and foreign visitors come to his shop. So, some local travelers who ate at his restaurant observed his lacquerware shop. Some of them are souvenir sellers in Yangon and Mandalay and thus he has got an additional new network to sell his products in Yangon and Mandalay because of running his own lacquerware shop on the road side. He also said that hotels are also a good market for lacquerware souvenirs.

There are altogether 81 hotels, motels and inn in Bagan (TDC, 2013). In addition, there are many new hotel projects because of potential tourism growth in Bagan. Most of the hotels are decorated with lacquerware products such as lamp, alms rice bowl, tissue box etc. Ko Soe Moe Thet said that four hotels in Bagan have ordered lacquerware products from him to be used as decoration at their hotels.

He said that his brother and two sisters supervise the workshop. They help him in lacquerware business. There are altogether 15 craftsmen in his workshop. The average wages of a craftsman at his workshop per month is \$ 10,000. During the worst period of tourism in 2000 and 2007, most of the lacquerware craftsmen changed their careers to do other things such as making bamboo roofs and walls in Myin-Ka-Bar, finding gold in Bagan and even migrating internally to other regions which provided jobs.

According to Ko Soe Moe Thet, 85% of the products in his shops are made at his own workshop. He has to buy 15% of his other products from other small lacquerware enterprises in the village. Because he wants to sell only good quality products, he mainly sells lacquerware souvenirs made at his own workshop.

He said that his lacquerware souvenirs are mostly sold because his shop comes attached with a restaurant. Otherwise, he too would not be able to sell his products because most of the tourists go to big lacquerware shops. So, the restaurant not only supports the lacquerware business but also helps make him a profit. Lacquerware cannot be sold throughout the whole year but, at his restaurant, he could sell Chinese food, Myanmar food and beverages such as beer throughout the year because both local travelers and international tourists seat the same menu throughout all the seasons. So even though there are periods when there are no foreign tourists, the local tourists still occupy the restaurant and provide him with some income. He said that the majority of inhabitants in Bagan are working in tourism-related businesses. So, people in Bagan have become more aware of the political situation because their livelihood mainly depended and will depend upon tourism which is sensitive to political situation of host country. The new generation, however, is not interested in joining the lacquerware industry. It is a big threat for the lacquerware industry. In these days, he is not faced with the lack of lacquerware craftsmen but is worried that in the future he will not be able to get enough professional craftsmen.

Another interesting small enterprise which was opened in 2012 is Jasmine Lacquerware shop. Ko Shane Aung is the owner of that shop. Before 2011, he was

working at making lacquerware at his small family workshop. But, he could not sell directly to the tourists. So, he had to send his products to one of the big lacquerware shops. Jasmine is a small lacquerware enterprise and all his family members help in this business. Although Jasmine is also a small lacquerware shop, it is a little different with the above mentioned Diamond Arrow small lacquerware shop.



Figure 6 Jasmine Small lacquerware shop

Source Field Survey

As shown in the Figure, Jasmine lacquerware shop is not located on the main road. Moreover, it is smaller than Diamond Arrow lacquerware shop and has no other attraction for tourists to observe. Moreover, their workshop is in front of the showroom. They managed to build a good showroom with concrete and brick in 2012 when tourism developed. Before that, they lived and worked in a house made of bamboo walls and thatched roof. It showed that tourism development led to economic improvements of small lacquerware enterprises because their main family business is producing and selling lacquerware souvenirs. Because, it is not on the road side, it is very interesting to note how they found customers.

Ko Shane Aung said that

“My brother used to sell sand paintings, which is also a modern popular souvenir in Bagan. He wandered to all the pagodas by motorbike and sold souvenirs to tourists directly. He could not earn a lot because he could not make sand paintings by himself. He had to buy from other people. Moreover, there are many sand painting sellers in these days. So, he cannot get much benefit. But, he could sell souvenirs to the tourists very well. Although he is not educated, he could communicate with tourists a little. After we decided to expand the business, he stopped selling sand paintings and started selling lacquerware, going to all famous tourist sites in Bagan by his motorbike. Moreover, he brings in some tourists who are interested in observing other designs of lacquerware. In addition, he also does some informal marketing by giving the address card of their home shop to the tourists. This is the main marketing channel of our business. I produce good quality products and in addition the price of my products is cheaper than that of big lacquerware shops. Moreover, my brother sells the products directly to the tourists. So, our family business is good in these days”

It is an interesting method for selling their own products like that. Before 2011, a few tourists came to Bagan but these small lacquerware workshop owners could not sell directly like that. They had to sell only to the big lacquerware shops. Now, because of rapid tourism development, they could earn more money by selling



directly to the tourists. Ensuring good quality products, fair prices and finding marketing channels by themselves were the main factors which helped ensure the success of their business.

### **3.7 The Emergence of Small Family Lacquerware Enterprises**

Before 2011, two out of the six quarters in Myin-Ka-Bar village produced real lacquerware souvenirs. Now, almost every house in Myin-Ka-Bar village has established small lacquerware enterprises which produce only real lacquerware souvenirs. Only one quarter of the homes produce plastic fake lacquerware. Those plastic fake lacquerware is especially for local tourists who make pilgrimages to Bagan because the price is very cheap and it can be easily distinguished between genuine good quality lacquerware products. It does not affect the market for real lacquerware souvenirs because international tourists are only interested in real lacquerware. The markets of fake plastic lacquerware and real lacquerware are totally different.

The improvement after 2011 is that there are many new small enterprises in the village which make only real lacquerware souvenirs. The lacquerware craftsmen who used to work at big lacquerware workshops try to improve their lives by establishing domestic small lacquerware enterprises. There is an increased demand for lacquerware souvenir these days. Therefore, they have high motivation to invest in their own business because the experience of high demand of lacquerware in 2012 and 2013 encourages them. Before 2011, because of the number of small arrivals of tourists to Bagan, there were a smaller number of small enterprises in Bagan compared to today. Most of the craftsmen worked in other big lacquerware workshop at Myin-Ka-Bar or Bagan. But, after 2011, the record-breaking number of tourist arrivals and high demand of lacquerware made lacquerware craftsmen in Myin-Ka-Bar village establish their own small lacquerware enterprises. So, over 80% of households have small lacquerware enterprises in these days. One cannot miss seeing lacquerware enterprises if one walks through the village. It is a positive impact of tourism on the livelihood of craftsmen. Before 2011, most of the craftsmen faced



under employment because the business from tourism was good only in five months of October, November, December, January and February. Now, they had strong confidence and high motivation to invest in their business and to work the whole year because their products will surely be sold during the peak tourist season. The entrepreneur of small lacquerware enterprise explained the nature of their business as follows.

“I have enough lacquerware craftsmen in a family. It is a family business. I do not need to hire outside craftsmen. So, I do not have the problem of labour shortages. But, if my family cannot make some design on lacquerware, I do not hire craftsmen for daily wages. I request my friend who is professional in the designing process. I pay him depending on the piece and depth of work. For instance, if it takes at least 3 hours to finish, I have to pay \$5 for that. Five dollars is the amount for daily wages for a professional craftsman at any one of the big lacquerware workshops. My friend does not need to work the whole day but, I think it is worth to pay it because he helps me when I need help. Moreover, it is his professional skill to finish quickly. I do not need to care how many hours he works.”

So, it can be noticed that the labour force of small enterprises are their family members. Each family member has his/her own skills in making lacquerware. They share the tasks within the family. They ask other lacquerware craftsmen to assist in some part of the making only when they are not good at that stage and they are busy. The current market wage in the village is paid to the craftsmen who help them in need. Some craftsmen told openly that they want to get higher wages because their work is better than others. At the same time, the owner of the small enterprise who ask the craftsmen to make some parts of the lacquerware souvenirs pay the price that the craftsman quotes because of the reputation of that craftsman's artistic work in the village. So, it can be noticed that the community helps each other. Small entrepreneurs have close relationships with each other in the village. In addition, in some occasions, small entrepreneurs help each other when they are in need and they both do not take money for their work.

### **3.8 The Role of Middlemen in the Lacquerware Market**

Although the small lacquerware entrepreneurs are fully employed for the whole year, they have to rely on big lacquerware shop to sell their products. There are over 20 big lacquerware shops in Bagan and Nyaung-Oo town. There are five big lacquerware shops on the main road in Myin-Ka-Bar village which can be accessed by tourists. However, there are just a few small lacquerware shops which produce and sell their products. Moreover, there are row of stalls at famous pagodas which are the main tourist sites in Bagan and Nyaung-Oo, which do not produce lacquerware. But, they buy and sell lacquerware to not only local pilgrims but also to international tourists. Small entrepreneurs in Myin-Ka-Bar village sell their products to big lacquerware shops in Bagan, Nyaung-Oo and Myin-Ka-Bar village and the stalls located nearby famous pagodas. Small lacquerware entrepreneurs in Myin-Ka-Bar seldom sell their products by themselves to the lacquerware shops in Bagan, Nyaung-Oo, Myin-Ka-village. They use middlemen.

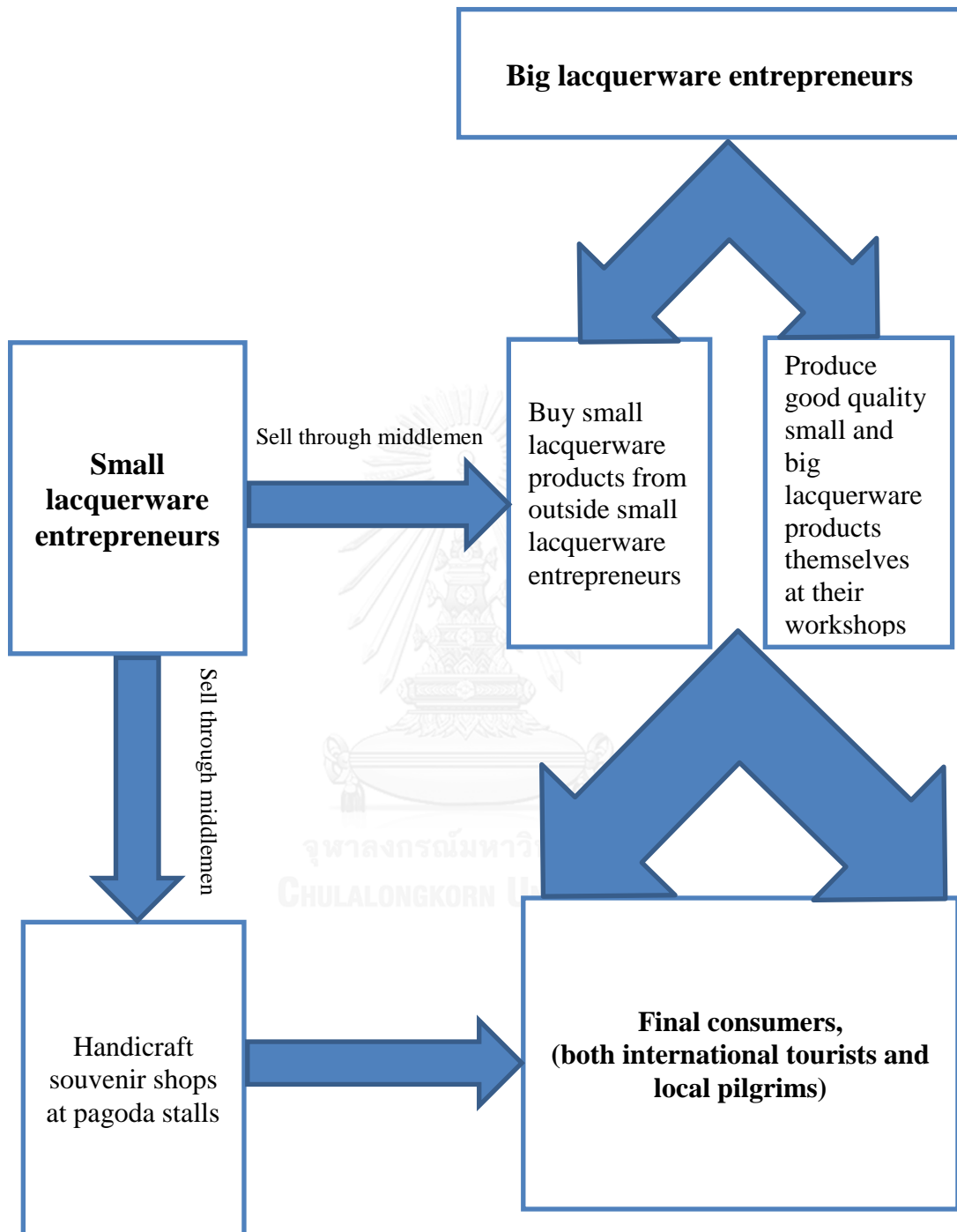


Figure 7 Marketing channel of lacquerware souvenirs

As shown in figure, small lacquerware entrepreneurs cannot sell their products directly to the consumers, both international tourists and local pilgrims. They have to use middlemen by paying 10 % to sell their products to big lacquerware entrepreneurs and small handicraft souvenirs at pagoda stalls. Big lacquerware entrepreneurs not only produce lacquerware products at their own workshops but also buy lacquerware products from outside small lacquerware entrepreneurs through middlemen. The handicraft sellers at pagoda stalls do not produce any handicraft. They just buy and sell other people's products. Because of many constraints and insufficient capital, small lacquerware entrepreneurs cannot sell their products directly to the tourists and they cannot get much profit for their work. Big lacquerware entrepreneurs, handicraft sellers at pagoda stalls, middlemen take some of their benefit.

Small lacquerware entrepreneurs in Myin-Ka-Bar village said that, "There are four or five lacquerware middlemen in the village. They wander in the village. If small lacquerware entrepreneurs want to sell their products, he shows samples of his products to the middleman. After the middleman has checked the quality and design of the products, he brings it to the big lacquerware shops in Myin-Ka-Bar or Bagan. A small lacquerware entrepreneur has to pay 10% of his sales to middlemen."

Another small lacquerware entrepreneur added like that, "We, small lacquerware entrepreneurs in the village, do not want to act humbly to the boss of big lacquerware shops. We sometimes have to wait for a long time because the boss of big lacquerware shops is busy and he/ she cannot see us when we bring and show our products at big lacquerware shops. The middlemen have good connections with the boss of big lacquerware shops. Moreover, it is their business. So, if one boss does not want to buy the products the middleman brings, he does not feel anything. He just brings the lacquerware souvenirs to another boss of another big lacquerware shop."

They said that they do not want to feel social discrimination when they show their products. They do not want to feel degraded in dealing with the bosses of big

lacquerware shops and do not want to put on a desperate or needy look to the boss. Moreover, most of the bosses of big lacquerware shops know how much time, effort and investment are devoted in making lacquerware souvenirs. Therefore, they hesitate to bargain for the prices they require from the original producers of the lacquerware i.e the small entrepreneurs. Middlemen are not the original producers. They are doing their business merely to get brokerage. So, the boss does not need to feel bad to bargain with middlemen. In addition, when the owners of big lacquerware shops need some specific products, they ask middlemen to find it amongst the smaller shops in the village. So, middlemen and owners of big lacquerware shops have a good business relationship between them.

A small lacquerware entrepreneur said that,

“The owner of big lacquerware shops often do not come out and meet us when we bring and show our products. But, when the middlemen go, they come and see the products. They make time for middlemen.”

So, the small lacquerware enterprises in Myin-Ka-Bar village have to rely on middlemen for selling their products. Even in the same village and although not geographically far from each other, the middlemen play an important role in marketing the lacquerware products made by the small entrepreneurs.

All small lacquerware entrepreneurs said that,

“We are happy to pay 10% of our sale to middlemen. We can save time. Moreover, we are happy not to act humbly to the boss of big lacquerware shops. ”

So, it can be noticed that middlemen are very important for the lacquerware market in Myin-Ka-Bar village. Middlemen cannot exploit the producers of the lacquerware by quoting high prices because all the bosses of the large shops know the market price. They get only their brokerage fee. But, they sometimes delay in paying money back to small lacquerware entrepreneurs although they have already got paid by the bosses of the big lacquerware shops. Instead they spend or invest it in another business though this may rarely happen.

While the bosses of big lacquerware shops pay low prices, the small lacquerware entrepreneurs have to pay 10% to middlemen. But, according to social norms in the village, they are satisfied with it. Moreover, the positive impact is that this trading method is presumed as being able to save time. So, the role of the middleman is also very important in the lacquerware market in Myin-Ka-Bar village.

### **3.9 Changing Production Trends in Big Lacquerware Shops**

Due to the benefits of tourism development, the big lacquerware workshop could employ more craftsmen. Before 2011, they employed only 15 to 20 craftsmen. After 2011, each big lacquerware workshop managed to employ about 50 craftsmen with their wages being higher than 2011. Before 2011, the daily wage of the professional craftsman was \$ 3 and the unskillful craftsman was \$ 1. The trainees got no money.

But, after 2011, the demand for lacquerware was very high. In 2013, they had experienced sold out conditions when they had ran out of stock in their shop. They had to buy whatever they got from small lacquerware enterprises in the village. Thus alongside high demand and high price of lacquerware souvenirs, the wages of craftsmen increased. Today, a professional craftsman can earn \$ 5 per day plus overtime at big lacquerware shop while an unskilled craftsman get \$ 3 per day plus overtime. Moreover, the owners of big lacquerware workshop pay \$ 1 per day for trainees who actually are not able to do anything as they have no skill. But, the boss pays \$1 per day to attract the new generation to join the lacquerware industry. Moreover, when those trainees become professional, they can employ them in the future because big lacquerware workshops have difficulties in finding professional lacquerware craftsmen these days.

Moreover, the working hours have already been changed. All lacquerware craftsmen have to work for 8 hours with working hours starting from 8:00 a.m to 4:00 p.m. They have a lunch break for one hour at 12:00. If they work overtime 3 hours, they get paid half of their daily wages. So, professional craftsmen get \$ 7.5 wages

including overtime. The unskilled craftsmen get \$ 4.5 wages including overtime. There are some professional craftsmen who are trained as designers who are very rare in these days in Myin-Ka-Bar village. They can earn \$ 10 per day including overtime at big lacquerware shop.

After working at the big lacquerware shops, craftsmen get back to their home at 8:00 p.m. Most of the craftsmen work on their own lacquerware souvenirs at their home at night. They said that it is like a form of savings. They do not need to rush. They work at their own lacquerware souvenirs steadily and slowly bit by bit. When they finish, they can sell them and get extra money which is then a form of savings for them. So, the livelihoods of craftsmen are much better after 2011. They do not need to be worried about unemployment. They have jobs throughout the year and do not need to be worried about being dismissed from their job.

A craftsman said that,  
“Before 2011, nothing is sure. We did not have jobs throughout the year. The worse periods were 2000, 2007 and 2008. Most of us worked at hotel construction sites in Bagan. While some of us worked to find gold in the fields near the ancient pagodas. This was illegal but we had no choice but to do it. Some of them even migrated to other parts of Myanmar to do other jobs.”

So, it could be noticed that tourism development after 2011 contributes to improve socio-economic development of craftsmen. They get fair wages and can live together with their families. Moreover, their wages is enough for their family. Apart from the wages, they can do their extra work with their own small investment and earn some additional income. It is like a form of savings for them. If tourism continues to develop like that in the future, they can be small entrepreneurs or can do other business.

The owner of the Mya-Thit-Sar big lacquerware workshop said that,  
“Every boss of the big lacquerware shops in the village has started to organize a recreation trip for their craftsmen once a year after 2011. Our craftsmen need

relaxation because they have to work throughout the year. Each owner makes arrangements separately for the trip and decides where to go depending upon the desire of the majority of craftsmen. Mostly, the trips are organized as pilgrimages throughout the Myanmar. Sometimes trips are even organized to the beach.”

Because of poverty, these low income class of craftsmen cannot afford to go for a pilgrimage to other areas in Myanmar. All Buddhists in Myanmar value going on religious pilgrimages. So, the craftsmen get full satisfaction working at big lacquerware shops because they get not only fair wages but also the opportunity to travel at least once a year.

The production trend of big lacquerware shops have changed after 2011. The owner of Aung Myin big lacquerware shop said that,

“I have started my business in 1986. At that time, my business was just a small enterprise. I had to rely on only the domestic market. After 1990, tourists started visiting Bagan and my business improved bit by bit. In 1996, I sold a lot of products because of many tourists in Myanmar that year. At that time, there were no shipping facilities and no credit cards available. I had to produce only small lacquerware souvenirs that tourists could buy and carry with them. In these days, I produce large lacquerware furniture such as cupboards and table.”

The improvement in production at big lacquerware workshops after 2011 is very interesting. They ordered raw furniture from one of the 3 small furniture enterprises in Myin-Ka-Bar village. Raw furniture is made of teak wood or other low quality wood, depending upon the order of the big lacquerware shops. The raw furniture is coated with at least 20 layers of resin and designs drawn on it. Because of the opening of markets and the return of democracy, shipping facilities and credit card systems have also been developed since 2011. The tourists who view products in lacquerware showroom can choose the items they want and if they like the design of the products such as big furniture lacquerware, they pay directly by cash or use visa card to pay the cost of lacquerware furniture plus shipping costs. The owner of big lacquerware shops sends the products later to the native country of tourists/customers



through a shipping company. Moreover, if the tourists do not like the products they found during their visit to lacquerware shop, they order products with the designs that they prefer. The owner sends continuous updates about the progress of the products through e-mail. It takes at least one year to a maximum of two years to finish one big lacquerware cupboard or table. Moreover, the price of those furniture items varies between \$ 60,000 to \$ 15,000. The owner of Aung Myin lacquerware shop said that, “Before 2011, they could not make orders or transactions like that. The highest tourism development in the history of Myanmar after 2011 has led to the best fortune we have had in the lacquerware industry”

They mainly produced big lacquerware furniture and good quality lacquerware souvenirs. They also bought the souvenirs produced by small enterprises in the village. They could not guarantee the quality of the products they bought outside. So, they bought them for low prices through middlemen. The customers may be from many different economic classes. Some customers can afford to pay high prices while some customers could not afford to do so. So, they show both good quality products they produced at their own workshop and low quality products they bought from small lacquerware enterprises in the village. They divide the lacquerware showroom into different rooms according to the quality of the products. In the front room, they show only low quality products which they upfront that they cannot guarantee the quality of. If the customers want to buy only good quality products, these are showcased at the back room. Compared to the products in the front room, those in back room are of very good quality. The quality is tested by pouring hot or cool water into the lacquerware bowl. The prices for both the different qualities are also very different. The price of good quality products are two or three times higher than that of low quality products. Moreover, the expensive big furniture lacquerware were also put in the back room.

So, it could be noticed that the production trends of big lacquerware workshops had changed after 2011. They mainly produced good quality products and expensive big furniture while still buying low quality products from small craftsmen in the village.



Figure 8 Big lacquerware shops at Myin-Ka-Bar village and ATM machine before the shops

Source Field Survey

The development of technology has helped the improvement of the lacquerware business. In Myanmar, credit cards and debit cards are difficult to use and there are not many ATM machines. All ATM machines are usually only located at their respective banks. Because of the high demand of lacquer souvenirs and the potential in this business, various banks have put ATM machines in locations around the big lacquerware shops after 2011 as shown in the photos. Moreover, if the ATM machine did not work properly and a report was given by the boss of lacquerware shop to the bank, the bank immediately repaired the machines at short notice. After 2011, big lacquerware shops not only provided full employment to the craftsmen but also bought many products from the small enterprises in the village. Moreover, they also changed trends to produce good quality souvenirs and expensive big lacquerware furniture.

### 3.10 The Nature of Lacquerware Shops

It is interesting that big lacquerware shops only sell lacquerware souvenirs. They do not sell other souvenirs together with lacquerware souvenirs. But, small lacquerware shops located at the pagodas sell lacquerware souvenirs together with other souvenirs such as sand paintings and wood carvings. In Myin-Ka-Bar, there is

only one small lacquerware shop with a restaurant attached which is located on the road side and opened after 2011 when tourism developed. The owner of that lacquerware shop said that his restaurant helps his lacquerware business a lot. Tourists observe his lacquerware shop after eating a meal at his restaurant. Moreover, when international tourist arrivals decline in summer, he can still have some business from running his restaurant and catering to local religious pilgrims. The owner of small souvenir shops at Anada pagoda said that she mainly sold lacquerware souvenirs. But, she also sells other handicraft. She said that she sells good and low quality lacquerware products. Group package tours accompanied by tourist guides rarely buys lacquerware at the stalls near the Pagodas. But, free and individual tourists (FITs) and small groups of tourists buy at these stalls. Because she sells all quality of lacquerware, her customers are both tourists and local pilgrims. Moreover, because she sells all souvenir and handicrafts, one product or another can be sold easily during the peak tourist season. In this manner, she has survived for over thirty years on this single one main family business. After 2011, the business has improved but, before 2011, the business was not that bad as well because she could sell other souvenirs to local pilgrims although there were no international tourists.





Figure 9 Lacquerware and other handicrafts souvenirs shop at stalls, Ananda Pagoda  
Source Field Survey

### 3.11 Lack of New Generation in the Lacquerware Industry

The main problem of the lacquerware industry is that there are very few new generation young people who are interested in joining lacquerware artistic work. Formerly, parents did not encourage their children to go to school. After finishing primary or secondary school, they had to learn lacquerware artistic work. At that time, they did not have other job opportunities. But these days, parents encourage their children to go to school. When they come back from school, they attend other training programmes such as computer or language classes to obtain professional skills that will allow them to work at other tourism-related jobs rather than manual work. Moreover, children do not want to work at lacquerware workshops any more. They would rather work other tourism-related jobs such as hotel receptionists, waiters, waitresses, and bank staff compared to lacquerware artistic work. If they

work in the lacquerware industry, they cannot come out from their village. They have to stay the whole day in their homes or at the lacquerware workshops. In addition, for the male workers in the lacquerware industry, they have to hold resin which is black and dirty. In addition, some people are allergic to resin.

It takes at least from one to two years to become professional at other three stages of making lacquerware except drawing design. At least there are some in the new generation who have joined to pursue those three stages of making lacquerware. However drawing sketches with freehand require at least five years to master as it is very difficult and requires an interest in painting. However, very few are willing to pursue this.

One lacquerware designer said that,  
“There are few professional designers in the village compared to the other lacquerware craftsmen who make bamboo frames, coating resin, polishing. Moreover, although I want to give my skill and knowledge to next generation, there is no one who wants to learn drawing sketches on lacquerware. It takes at least five years to be professional. It needs concentration and painting skill.”

Lacquerware products in Bagan are famous for its good quality and design. Now, there are few in the younger generation who are willing to join in learning drawing sketches. In future, there will be no skillful and professional craftsmen who can draw many kinds of design and sketches on lacquerware. It is a big threat for the sustainability of that knowledge as well as to the genuine sustainability of lacquerware souvenirs in Bagan.

Another businessman complained about the shortage of labour in Bagan. Ko Aung Kyaw Win, who is the manager of Alpine purified drinking company said that,  
“Because of tourism development, selling purified drinking water is also a good business in Bagan. But it is very difficult to find manual labour in Bagan. The youths in Bagan do not want to work tiring jobs. Their mindset is ruined by tourism. They want to earn money easily. So, it is very difficult to employ a labourer with

only \$ 3 per day in Bagan. They may work only in summer when the tourism industry is low. But, they have no desire to do other jobs in the winter when the tourism industry is at the peak season. He added that they can earn money easily by just bringing a bag of souvenirs and selling them to tourists at the pagodas in Bagan. Moreover, if they bring some FIT tourists to the lacquerware and sand painting shops, they would get a commission. So, they are not interested in doing other jobs. I have to find permanent employees in other villages outside Bagan.

The experience of Ko Aung Kyaw Win is the same with U Mg Mg who is the owner of Ever Stand lacquerware shop. U Mg Mg said that, “The owners of big lacquerware workshops have to collaborate with professional and skillful lacquerware craftsmen to producing good quality lacquerware. Good quality lacquerware cannot be made by only one skillful craftsman. It needs collaboration of all professional craftsmen because each has their different significant skill in every step of making lacquerware. So, while I have my existing professional craftsmen, it is very important to train potential replacements. I am worried about new generation who will not be able to get the invaluable knowledge of lacquerware artistic work in Bagan. It is a big threat for the sustainability of the lacquerware industry in Bagan”

Bagan is rich in culture and famous tourist-sites. Thus there are many job opportunities for youth in the tourism-related service industry these days. Youths and some lacquerware craftsman are more interested in current job fads by working in the industry as hotel staff, waiters, tour guides, selling souvenirs, or driving cars for tourists.

So, U Mg Mg collects newer younger generation workers amidst youths living in rural areas of other region. He pays them fair wages and provides meals and accommodation for them. Through this he says that he can produce professional lacquerware craftsmen which will also lead to sustainability of lacquerware industry in Bagan.

Unfortunately, U Mg Mg is the only one who had these measures amongst all the owners. Others are worried about the sustainability of lacquerware industry too. But their improvement measures are merely by paying \$ 1 to trainees to motivate to learn lacquerware craft. But, it does not work well because there are few members of the younger generation although the pay is good. It is worse that among four steps of lacquerware, there are fewer younger generation craftsmen training in drawing design comparing to other steps. Drawing design is the most difficult and important part in making lacquerware.

### **3.12 The Experience of a Tour Guide in the Lacquerware Market**

A tourist guide in Bagan explained his experience in the lacquerware market. Some tourists think that he brings them to the big lacquerware shops because he wants to get commission. Actually, all tourist guides are not stereotypes. Some do not expect commission. They provide their services dutifully. But, big lacquerware shops pay commission to them automatically if the tourists they bring buy lacquerware souvenirs. That is the culture of tourism in Myanmar and thus they accept it when they are paid. But, the guide continues to bring tourists to the big lacquerware shops not because he wants commission but because he wants to show the tourists about the process of making lacquerware. Tourists can observe all the processes of making lacquerware souvenirs step by step at the big lacquerware shops. In a big lacquerware shop, the showroom and workshop are connected to each other. There are small lacquerware shops at pagodas. While sightseeing at the pagodas, tourists observe and ask the price of lacquerware souvenirs but mostly, the lacquerware souvenirs at stalls in the pagodas are medium and low quality products. They do not give any commission to tourist guides. So, the price in those shops is cheaper than that of big lacquerware shops. After observing lacquerware shops at pagoda stalls, tourist guides bring tourists to big lacquerware shops. At that time, the price is higher not only because of the better quality of products but also the commission to the tourist guide. Mostly, tourists cannot distinguish the quality of lacquerware souvenirs as the quality depends on the raw material at the innermost layers of resin, how many layers of resin and the design. So, some tourists said that

they will not use the lacquerware as utensils. They will keep it as souvenirs from Myanmar and so, quality is not important as long as it is cheap. But, some tourists want to buy quality products at big lacquerware shops. So, buying at big lacquerware shops or at small lacquerware shops largely depend upon the budget and the need of tourists. In general, however, it can be concluded that group package tours rarely buy at small lacquerware shops. They buy only at big lacquerware shops. Free and individual travelers (FITs) and one or two tourist led by tourist guides buy at both big and small lacquerware shops.

### **3.13 The Role of Government for the Ensuring of Long-term Sustainability of the Lacquerware Industry**

The small and big lacquerware entrepreneurs and the craftsmen said that they had no support from the government for the ensuring of long-term sustainability of their handicraft business. All big lacquerware workshops were established for over one decade but got no support from government. But, there is a list of all the old big lacquerware workshops at Township Finance and Revenue Department. So, they have to pay annual commercial tax to Township Finance and Revenue Department. Each big lacquerware workshop has to pay \$ 500 annual commercial tax to the government and in addition the owners of big lacquerware workshops have to pay \$ 20 per month to the Township Social Welfare Department for the health care welfare of craftsmen in their workshops. If a craftsman goes to hospital, he can get free health care service because his boss paid the monthly social welfare fee to government. But, in fact, the owners of big workshop and craftsmen are not aware of the free health care service. Therefore, they are not interested in free health care service from the government. Some craftsmen do not know anything about that. If they feel sick or are unhealthy, they just go to an outside private clinic at their own expense. Although some craftsmen sometimes go to hospital, they never asked for their right/benefit of free health care service. They have to make payment by themselves. So, it can be concluded that the dissemination about their social welfare benefits from the social welfare department is very weak. The department only focuses on collecting monthly social welfare fee from owners of big lacquerware



workshops. As most of the craftsmen are uneducated, they know nothing about social welfare service and their rights. In addition, the social welfare service in Myanmar is very weak. Generally, people have in their minds that they have to pay for everything at hospital. On the other hand, if one asks for free health care service because he pays the monthly social welfare fee, it takes a long time to go through the administrative process to get free service or money from government. So, people do not want to ask for it although they know the rules and regulations as well as their rights.

But the Township Finance and Revenue Department does not levy any commercial tax on small lacquerware enterprises. So, small lacquerware entrepreneurs do not need to pay any commercial tax nor any monthly social welfare fees to the government. Although the government levies tax, there is no other form of support in ensuring long-term sustainability of lacquerware industry in Bagan, except for the Lacquerware Technology College in Bagan which is funded by the government. This college provides a two year diploma course in lacquerware technology both practically and theoretically. Moreover, this college provides training, holds workshops and organises seminars to disseminate and maintain lacquerware technology, new designs and art. So, it can be concluded that although government does not directly to ensure long-term sustainability of the lacquerware industry, there is indirect support via the government-funded Lacquerware Technology College.

### **3.14 Conclusion**

Although the tourism industry in Myanmar developed during the Parliamentary Democracy government period from 1948 to 1962, it declined during Socialist government from 1962 to 1988 because of too many restrictions and very short visa allowance. At that time, handicraft business did not totally rely on tourism industry. Handicraft industries including lacquerware depended upon domestic market because of the closed economy system which did not allow importation of other goods and utensils to Myanmar. So, there was no competitive market and Myanmar people had to use local handicraft as household utensils as well as

souvenirs. But, after 1988, the military government practised market economy and allowed foreign investment. At the same time, the government tried to promote the tourism industry. So, there was a competitive market for handicraft utensils and souvenirs. They were replaced by other imported plastic and steel utensils. So, lacquerware, one of the famous handicrafts in Myanmar, started to rely on tourism industry. Although lacquer was produced all over Myanmar before 1988, most of them disappeared in other areas because there was no reliable market. The lacquerware industry in Bagan survived because Bagan is the most famous cultural tourism site in Myanmar. Although tourists visited as soon as the country opened in 1990, the number of tourist arrivals was not high compared to that of other neighbouring countries. The number of tourist arrivals fluctuated around 200,000 in 1990s. After 2000, although there were many international campaigns to boycott visiting Myanmar, the number of tourist arrivals did not decline. But, the number of tourist arrivals did not increase significantly after 2000. Owners of lacquerware industry and lacquerware craftsmen in Myin-Ka-Bar village said that their business totally relied on the tourism industry. Although the official number of tourist arrivals did not decline, local people in Myin-Ka-Bar village said that they experienced the lowest tourist arrivals in their lives in 2000, 2007 and 2008. They had to change to other careers in Bagan or had to migrate to other regions when tourism declined. Although there was another alternative market to export lacquerware souvenirs to Thailand from 2002 to 2007, they got only a low price for their products and the market demand was not very high. Only some small entrepreneurs could rely on that market during that period. But, after 2011, the abrupt change of government and Myanmar democratization led to the removal of international sanctions and attracts tourists to visit Myanmar. In other words, the tourism industry boomed again as soon as the political system changed from Military to Democratic government in 2011. So, the business of lacquerware souvenirs improved again as a trickle-down effect of tourism development. As a result, lacquerware craftsmen could join this industry again. High demand of lacquerware after 2011 contributed to better employment opportunity for craftsmen. They got better payment because owners of big lacquerware workshops were competing to attract skillful craftsmen. Today, lacquerware craftsmen make their own lacquerware products when they get back to

their home at night. They want to invest time and money for their own products because they are sure to sell their products at tourist peak seasons in Myanmar. The wages from workshop is enough to support the family. Their own work at home is like saving money. Tourism development after 2011 helped big lacquerware entrepreneurs a lot. Together with the country's 'opening up' measures and intensive tourism development, tourists can now use ATM machines and even credit cards. Moreover, lacquerware entrepreneurs could send big lacquerware furniture (cupboards, tables) to the host country of tourists through shipping companies which was available after 2011. They did not have these opportunities before 2011. So, big lacquerware entrepreneurs tried to innovate by experimenting with various designs and producing big lacquerware furniture which are very expensive. So, tourism development provided many benefits to the business of big lacquerware entrepreneurs. As a result, the craftsmen in the big lacquerware workshops also got better employment opportunities as well as socioeconomic development.

Moreover, craftsmen established many small lacquerware enterprises in their home with the support of their family members. They did not need to hire other people because each family member had their own skills. They had to request other professional craftsmen only when they were not good at that stage and they are busy. Although business was good after 2011, the main barrier for new small entrepreneurs is a limited market because tourists visited only the big lacquerware workshops and showrooms which are on the main road. They do not visit other small enterprises which are far away from the main road especially since it was also difficult to get there. Big lacquerware entrepreneurs produce and sell their own products at their showrooms while they buy other lacquerwares souvenirs outside because their own products are not enough for sales at the tourist peak seasons. Although the big lacquerware showrooms on the main road and small lacquerware enterprises are in the same village and not far from each other geographically, small lacquerware entrepreneurs had to rely on middlemen to sell their products to big lacquerware entrepreneurs. The small lacquerware entrepreneurs have to pay 10% of the money of their sales to middlemen. The small entrepreneurs do not want to behave humbly to big entrepreneurs. Moreover, big lacquerware entrepreneurs hesitate to bargain if

small lacquerware entrepreneurs come and sell their products directly. Middlemen and big lacquerware entrepreneurs have regular relationship. In addition, small lacquerware entrepreneurs are satisfied with paying brokerage to middlemen because they can save time and do not need to be humble to big lacquerware entrepreneurs. In other words, middlemen play an important role not only for small lacquerware entrepreneurs but also for big lacquerware entrepreneurs who own big showrooms on the main road.

Although the big lacquerware shops are able to invest to sell other souvenirs in their lacquerware shop, they do not sell other things. They do not have other lacquerware-related businesses and focus on lacquerware souvenirs only. Apart from big and small lacquerware shops, another lacquerware market in Bagan are stalls at famous pagodas. The stalls at famous pagodas sell not only lacquerware souvenirs but also other souvenirs. They do not produce anything at all. They buy and sell all souvenirs. They cannot rely on selling lacquerware only.

In spite of the emergence of many new small enterprises in the whole village, their market is very limited and they totally rely on big lacquerware entrepreneurs. They cannot establish small shops on the main road to sell their products to tourists directly because the rent of shops or a small acre of land on the main road is very expensive. There were only two small enterprises in the whole village which not only produced but also sold their products to the tourists directly. The first is the Diamond Arrow, a small lacquerware shop on the main road. The owner could establish his business on the main road because he could rent the shop on the main road with cheap price from his close relative. The owner of the Diamond Arrow lacquerware shop runs a lacquerware shop attached with a restaurant. He opened the new shop in 2012 only when tourism industry boomed again. He said that he cannot compete with big lacquerware showrooms to attract tourists. His lacquerware-related business and restaurant helps him a lot to attract customers. Free and individual tourists (FITs) come and eat at his restaurant after going for sightseeing at famous pagodas and temples which are near the Myin-Ka-Bar village. After having lunch, they visited the lacquerware souvenir shop attached to restaurant. Moreover, he got other new local

market networks in Yangon and Mandalay after running this shop. In addition, he can run his shop not only during tourist high seasons of winter but also tourist low season in summer because local pilgrims can eat at his restaurants. So, after 2011, he is one of the pioneers of small entrepreneurs who could sell his products directly to tourists by running his shop on the main road and attaching it to a restaurant.

Another new small lacquerware enterprise which also opened in 2012 is the Jasmine lacquerware shop. The owner of the Jasmine lacquerware shop could not run his shop on the main road. He established his small lacquerware showroom in his yard which is not on the main road. But, his brother helps him by finding customers because his brother used to sell other souvenirs by wandering all around the famous pagodas and temples by motorbike. His brother stopped selling other souvenirs made by other people and started selling their own lacquerware souvenirs. Moreover, his brother marketed their shops by giving their address card to the tourists. In addition, if tourists want to observe the lacquerware workshop and other designs, he brings them to their shops. So, these two small lacquerware entrepreneurs created their own method to sell their products directly to the tourists. They do not need to rely on big lacquerware entrepreneurs as well as middlemen.

Although the business was good for craftsmen as well as big and small entrepreneurs, the threat for the business is lack of the new generation who are interested in joining in this industry. For the youths, this artistic work in the village is boring for them. Other jobs in the tourism industry such as hotel staff, waiter, tour guide and driver attract them. As aforementioned, among four stages of making lacquerware, drawing designs is the most difficult one. The new generation in drawing designs is fewer than that of the other three stages. In addition, Bagan lacquerware is famous for its quality and designs. If there are no lacquerware craftsmen who can draw various designs in future, it is a big threat for the sustainability of lacquerware in Bagan. So, too much dependency of the small new lacquerware entrepreneurs on big lacquerware entrepreneurs and the lack of new generation to join in this industry are the main threats for lacquerware industry. If small lacquerware entrepreneurs could sell their products directly to the tourists, they

can enjoy more profits. This will become a motivation for other craftsmen to try to become small entrepreneurs. Otherwise craftsmen will not be able to establish small lacquerware shops forever. The raw materials of lacquerware also played an important role in this industry. An interesting fact is that no raw material for lacquerware could be found in Bagan although it is the heart of production for lacquerware souvenirs in Myanmar. All raw materials for lacquerware are imported from other regions of Myanmar. Bagan became the heart of lacquerware production in Myanmar because of possessing professional and skillful lacquerware craftsmen and cultural tourist sites of ancient pagodas. So, in the next chapter, the inputs of lacquerware souvenirs such as bamboo, wood, resin, dyes and furniture will be discussed. The importance of inputs of lacquerware, their origin, the business of inputs and the threat for the availability of those inputs will be discussed.



## **CHAPTER IV**

### **LACQUERWARE-RELATED BUSINESSES**

In this chapter, one main research question is answered. (1) What is the impact of tourism on lacquerware-related businesses? This chapter mainly focuses on the importance of the inputs of lacquerware souvenirs. In this chapter it will be detailed how lacquerware entrepreneurs obtain the inputs of lacquerware, the availability of lacquerware inputs, the nature of inputs market, and other lacquerware-related businesses.

#### **4.1 Lacquerware-related Businesses**

The lacquerware industry in Bagan is very interesting because no raw material is available in Bagan. All raw materials are natural products which the lacquerware entrepreneurs have to buy from all over Myanmar. The main raw materials are bamboo, wood, resin and dye.

Bamboo for lacquerware mainly come from Homalin town in Upper Myanmar via bamboo rafts through Ayeyarwaddy water way. The bamboo which is used in the raft and has come into contact with water in the river cannot be used in making lacquerware. Only bamboo which is on the raft and did not touch water can be used for lacquerware souvenirs. So, there are just a few bamboo in the raft that can be used for lacquerware while the other bamboo is used in making bamboo wall and roof for houses. In Myin-Ka-Bar village, making bamboo walls and roofs are also one of the main livelihoods for inhabitants. There are six domestic businesses making bamboo walls and roofs in Myin-Ka-Bar village. Those six domestic enterprises bought and obtained bamboo rafts for their main business of making wall and roof from Homalin town in upper Myanmar. There are some companies who collect bamboo at Homalin. The villagers who live in periphery of Homalin grow bamboo in their own yard and sell to the companies in Homalin. The businessmen who make bamboo walls and roofs in Myin-Ka-Bar village go and buy bamboos from those companies. They do

not use ships. They just make bamboo rafts and drift it in the Ayeyarwaddy river because Homalin and Bagan are both located on the river side. Moreover, the waterway is very cheap and effective. But, they cannot buy and drift bamboo raft during summer because of very low water levels. So, they can buy only during the rainy season and winter when the water levels are high. All businessmen of bamboo walls and roofs in Myin-Ka-Bar village buy bamboo in Homalin two times a year. Each bamboo enterprise in Myin-Ka-Bar village can transport about 3,000 bamboo canes on the raft for lacquerware enterprises per year. Lacquerware craftsmen said those bamboo which are under the sun for a long time is very good for making lacquerware because there will be no moth-eaten parts in the bamboo. So, lacquerware souvenirs can last for a long time. Bamboo sellers said that they only carried 10,000 bamboos by raft at any one time, of which 3,000 (roughly 30%) can be used for lacquerware entrepreneurs who themselves cannot go and buy bamboo like that because they do not need much bamboo. The lacquerware entrepreneurs only need the small amount of bamboo which can be obtained through the raft. All lacquerware entrepreneurs in Myin-Ka-Bar village thus have to rely on bamboo wall and roof businesses. Before 2011, the price of a bamboo was only \$ 50 cent but after 2011, the increased demand of lacquerware souvenirs lead to increased demand of bamboo raw materials. The price of bamboo thus shot up higher and higher. Today, one bamboo cost \$ 2.50. The lacquerware businesses and bamboo wall and roof businesses are related. If bamboo wall and roof businesses stop in Myin-Ka-Bar, lacquerware entrepreneurs will find it difficult to get bamboo. Until now, the bamboo wall and roof business is still good in Bagan. But in the future, other materials may replace bamboo walls and roofs.





Figure 10 Some Bamboo wall and roof businesses in Myin-Ka-Bar village

Source Field Survey

Another main raw material of lacquerware souvenirs is wood. Teak and other soft wood are used in making lacquerware. The frame of all round-shape lacquerware souvenirs are made of bamboo. The frame of square-shape lacquerware souvenirs are made of wood. Moreover, big lacquerware furniture items such as cupboards and tables are also made of wood. So, the furniture business is also closely related with lacquerware business. All small lacquerware enterprises make bamboo frames themselves. So, big lacquerware shops order bamboo frames from the small lacquerware enterprises. But for wood frames, both big lacquerware shops and small lacquerware enterprises have to order from furniture workshops in Myin-Ka-Bar village. There are three furniture workshops in Myin-Ka-Bar village.

One owner of furniture workshop said that he is not a native of Myin-Ka-Bar. He used to live and work other village at western bank of Ayeyarwaddy river which is not far from Bagan which is on the eastern bank. He worked as a farmers as well as a carpenter in his native village. He married a lady from Myin-Ka-Bar and moved there. At first, he worked as carpenter in Myin-Ka-Bar. But later, he made friends with an owner of a lacquerware enterprise. He was very creative and talented lacquerware craftsmen and suggested to create small wooden frames to be used for lacquerware such as trays, small boxes etc. As time went on, he got more and more orders and today his business is one of the main big furniture enterprises in Myin-Ka-

Bar village. Three big lacquerware shops in Myin-Ka-Bar village have ordered him to make big furniture items such as cupboards, tables, small boxes and trays. His daughter is herself working at one big lacquerware shop. Moreover, she also makes lacquerware souvenirs herself at home in her free time. The business is very good. He said that it is sometimes difficult to get teak wood. But, he has never experienced a shortage of wood yet although the price of wood continues to increase. He said that he had to make small furniture such as trays and boxes before 2011. After 2011, the trend of order from big lacquerware shops has changed. After 2011, he has to make big furniture items such as cupboards, tables and chairs. He said that the demand for big lacquerware furniture increased after 2011. However, he said that there is still demand for small lacquerware boxes to be used as a case for silk clothes. Silk clothes in Mandalay are very expensive and the market is competitive. The owners of silk enterprises put their silk clothes in attractive lacquerware boxes. So, they ordered small lacquerware boxes at big lacquerware shops. These big lacquerware shops in turn order him to make small boxes for the frame of the lacquerware boxes. He said that he had never experienced jobless conditions before 2011 although the lacquerware business was not very good because there were only a few furniture workshops in Myin-Ka-Bar village and thus he always had business. Moreover, he also earned money as a carpenter by building houses before 2011. But after 2011, the tourism development leads to full employment for the whole year. Moreover, he does not need to work other jobs such as building houses. He has to focus on making only furniture at his own workshop. In addition, he has extended his business by employing other carpenters. He could even build a house after 2011 because business was very good. So, he said that tourism development has contributed good fortune for him.



Figure 11 Furniture workshop and some finished products

Source Field Survey

Another important raw material for making lacquerware is resin. There are only five wholesalers of resin in Myin-Ka-Bar village. The small lacquerware enterprises cannot invest a lot for storing much resin. They buy little by little from wholesalers in the village. Resin especially comes from Pyin Ma Nar, Kyauk-Ka in

central Myanmar and northern Shan state. The quality of resin from northern Shan state is the best. It is a natural forest product. The inhabitants from northern Shan state and Pyin Ma Nar harvest natural sap from lacquer trees. They come and sell the sap to the wholesalers in Myin-Ga-Bar village. The five wholesalers in Myin-Ka-Bar have their own networks of lacquer sellers from Northern Shan state. It is very expensive. It cost \$ 100 for 20 liters. The small entrepreneurs buy little by little from wholesalers in Myin-Ka-Bar village depending upon their needs. But, the owners of big lacquerware shops do not buy from wholesalers in the village. They buy directly from the original sellers from northern Shan state or Pyin-Ma-Nar. They have their own network as they can invest a lot. One wholesaler of lacquer resin said that it is a natural product. Their family business is selling resin for over 20 years. In these days, deforestation has occurred all over Myanmar. In future, the resin may be rare and more expensive. The price of resin raw material is more and more expensive not because of high demand but because of increasingly higher prices from the original sellers.

Another important raw material is dyes which are to be used for the designs. The three main colours are red from cinnabar, the yellow from orpiment and blue from indigo. The price of dye is very expensive. There are a few families who know the formula of making dyes from cinnabar, orpiment and indigo. They obtain raw material from Chin state in western Myanmar which is on the Indian border. Only the family members know the knowledge and formula of dyes. They keep the formula a secret known only to themselves and monopolize the market. Big lacquerware shops have their own formula of dyes. They do not depend upon those people who monopolize the market. But, the small entrepreneurs have to depend upon the monopolized market of dyes. After 2011, the price of dyes increased together with the high demand for lacquerware souvenirs.

So, it can be concluded that the lacquerware business is related with other businesses. Moreover, all the raw materials used to produce lacquerware are natural products. Although big lacquerware entrepreneurs can invest a lot for raw material and buy directly from direct sellers, small entrepreneurs cannot do that. So, they

cannot make much profit although the demand is very high. But other lacquerware related-businesses such as bamboo and furniture get indirect benefits from the high demand for lacquerware. So, tourism development not only supports the lacquerware industry but also helps other businesses related to the lacquerware industry.

## **4.2 Conclusion**

All lacquerware raw materials are natural products. Although Bagan is the heart of lacquerware production, the raw materials comes from other regions in Myanmar. The lacquerware industry can survive in Bagan because of the presence of skillful craftsmen and a strong tourism market. Bamboo and wood are important raw materials for making frames for lacquerware. But lacquerware entrepreneurs are unable to procure the bamboo by themselves. They rely on bamboo wall and roof businesses who are the main users of bamboo in Myin-Ka-Bar village. Each bamboo wall and roof business can share roughly 30% of the bamboo they carried via water ways for lacquerware enterprises. Up to this date, the lacquerware business has never experienced a shortage of bamboo. Bamboo comes from the upper part of Myanmar. It is a natural product. Today, deforestation occurs all over Myanmar. If bamboo supplies are unobtainable, the lacquerware industry cannot be sustainable in Bagan. Moreover, bamboo wall and roof businesses are also very important for the lacquerware business because lacquerware entrepreneurs only need a small amount of bamboo which they cannot go and buy by themselves from Upper Myanmar. If they buy bamboo by themselves, they cannot use bamboo which is waterlogged and they have to throw it away. So, the price of inputs will be high. So, it can be concluded that bamboo wall and businesses are essential for the sustainability of lacquerware enterprises. Fortunately, bamboo walls and roofs cannot be replaced with other items in Bagan in the near future because of slow development in this area. The local community will use bamboo walls and roofs in the long run to be used as defensive and building material for their houses. Although Myanmar is famous for teak wood, it is very expensive and it will be difficult to get in future. So, other cheap and common wood will be used in future in making frame for square shape of lacquerware souvenirs and big cupboard and table lacquerware. Resin is the most important inputs

and it is also a natural product. So, deforestation also threatens the availability of resin in future. Even today, the lacquerware entrepreneurs suffer problems associated with a high price of resin. Other inputs such as dye, can be obtained easily although the formula is maintained secretly within some families. The price of dye for lacquerware is high because of the monopolized market controlled by a select few. So, it can be concluded that human resources, especially the skilled individuals who possess the valuable skill of making lacquerware, is the only factor of production for lacquerware souvenirs in Bagan. All inputs are natural products and they all are threatened by rapid deforestation in Myanmar. Although the demand by tourism supports the sustainability of lacquerware industry in Bagan, deforestation threatens the availability of inputs for lacquerware souvenirs. The role of the Government is very important for maintaining traditional handicrafts. If government wants to maintain traditional handicraft such as lacquerware, which is also souvenir for international tourists, it needs to consider the impact of deforestation and the availability of inputs which are natural products. For example, the government should maintain *Melanorrhoea usitata* tree in the forests which is the only source for lacquerware resin. Until now, the government has no plan to maintain traditional handicraft as well as to prevent deforestation. If all natural product inputs are not available, the lacquerware industry cannot be sustainable in Bagan in spite of there being a good market for its products due to the tourism industry.

Although the government has no clear plan to maintain traditional handicraft, the Lacquerware School is an indirect way of doing this. It was established in Bagan since British times. Today, the school has been upgraded to become the Lacquerware Technology College. This college also plays an important role for the sustainability of lacquerware industry in Bagan and provides vocational training of handicraft not only in Bagan but also other rural areas in Myanmar. Today, as aforementioned, the lack of new generation joining the lacquerware industry is one of the threats for the sustainability of lacquerware industry. In the next chapter, the mechanism of how the Lacquerware Technology College supports the production of new generation of skilled handicraft makers and how to develop lacquerware technology and designs will be discussed.

## **CHAPTER V**

### **THE ROLE OF THE LACQUERWARE TECHNOLOGY COLLEGE**

In this chapter, one main research question is answered. (1) How does the Lacquerware Technology College support the lacquerware industry in Myin-Ka-Bar village? To answer this question, the background history of the Lacquerware Technology College and how it lends its support for the sustainability of lacquerware industry are discussed.

#### **5.1 Background of the Lacquerware Technology College**

The Lacquerware Training School was first established in 1924. In 1995, the school's status was elevated to become the Myanmar Lacquerware Institute. The institute was upgraded again to become the Lacquerware Technology College in 2003. It is the only Lacquerware Technology College in Myanmar. The three different departments under the Lacquerware Technology College are: (1) Training department, (2) Research and production department and (3) Administration department. The objectives of the Lacquerware Technology College are:

- (1) To preserve Myanmar's lacquerware technology
- (2) To introduce inventions and disseminate new methods without endangering the traditional lacquerware technology
- (3) To continuously produce skilled lacquerware craftsmen
- (4) To develop lacquerware technology through formal education methods.

The college is conducting a two year diploma course in lacquerware technology. The minimum qualification to join the college is passing matriculation exam. The subjects are divided into three parts: (a) Lacquerware subjects, (b) Auxiliary subjects, (c) Co-operative subjects.

(a) Lacquerware subjects

- (1) Based Plain body making
- (2) Black body making
- (3) Incised lacquerware making
- (4) Relief moulded lacquerware making
- (5) Gilded lacquerware making
- (6) Art of painting
- (7) Art of carving
- (8) International lacquerware technology
- (9) Packaging lacquerware souvenir

(b) Auxiliary subjects

- (1) Basic commerce principles
- (2) Basic management
- (3) Myanmar history and culture
- (4) Chemistry
- (5) Botany

(c) Co-operative subjects

- (1) Myanmar
- (2) Business English
- (3) Mathematics
- (4) Principles of cooperation
- (5) Introduction geography
- (6) Management Principles
- (7) Financial accounting
- (8) Applied statistics
- (9) Principles of economics



- (10) Computerized Accounting & Spread sheet application (MYOD & Excel)
- (11) Aspects of Myanmar

After studying for two years at the Lacquerware Technology College, a Diploma in Lacquerware Technology is awarded to students. Moreover, the students are permitted to attend the Co-operative University starting from their third year.

The Lacquerware School was opened in 1924 in Bagan during the British administration. At that time, the courses offered were mainly for lacquerware handicraft skills. In 1995, State Law and Order Restoration Council (SLORC) upgraded to become the Lacquerware Institute. At that time, not only lacquerware handicraft skills but also Myanmar culture and history, English, Myanmar subjects were taught at Lacquerware Institute.

At that time, there were three levels:

- (1) Basic level
- (2) Intermediate level
- (3) Diploma level

People who finished their primary education could join the basic level courses. People who had passed at least junior high school could join the intermediate level. People who passed their matriculation exam could join at the diploma level. At that time, practical work of lacquerware handicrafts were the main courses offered. The three levels of courses at the Lacquerware Institute were very good because it gave an opportunity to all classes of people to learn. Most of the big lacquerware owners in Bagan today are graduates of the Lacquerware Institute. But, there were fewer and fewer members of the younger generation who want to learn lacquerware art. So, the Ministry of Education had to make arrangements to attract students to join the Lacquerware Technology College. In order to give some incentives for the programme, the government made a bridging program to the Institute of Economics

where a student at the Lacquerware Institute who had completed the 2 year diploma could go on to attend the Institute of Economics.

In 2003, Lacquerware Science was upgraded again and became known as the Lacquerware Technology College. Initially there was a bridging program with Institute of Economics whereby students who had finished their two year diplomas could join the Institute of Economics but this was stopped in 2011 and replaced with another bridging program whereby they could join the Cooperative University. Today, not only lacquerware handicraft but also other co-operative subjects are taught at the Lacquerware Technology College. Both male and female students now join the college with a total number of some 200 students who finished matriculation exam joining the college each year. Unfortunately, some students dropped-out after their first year when they failed in the exam. After two years in the course, the ability of students in making lacquerware still depends upon their interest and efforts. There are 7 hours of learning every day: three hours for lacquerware subjects and four hours for co-operative subjects. There are two semesters per year and students have to study at least four subjects each semester. Some students are very interested in lacquerware art. But, some are not interested in lacquerware art. They are only interested in co-operative subjects such as co-operative theory, management, account and statistics. All co-operative subjects are taught in English while theory of Lacquerware art is taught in Myanmar. In the course syllabus, theory of lacquerware is 40% while practical work makes up 60%. The grading system for the exams are also similar; 40% for theory and 60% for practical work. But, students have to submit a group research paper for their graduation at college. After the two years diploma course at the Lacquerware Technology College, some of the students joined corresponding courses to get a degree. But, most of them joined the Co-operative University.

## **5.2 The Support of the Lacquerware Technology College to the Sustainability of Lacquerware Industry**

There is a lacquerware museum in the compound of the Lacquerware Technology College. This is the only lacquerware museum in the whole of Myanmar. Most of the tourists who come to Bagan visit the lacquerware museum. Before 2011, tourists had to pay \$ 2 entrance fee for lacquerware museum. But, the Ministry of Hotel and Tourism (MOHT) changed this policy to become free admission for the lacquerware museum. If no entrance fee is collected it was hoped that, more tourists would come and the sales of the lacquerware shop in the college compound would increase. This proved to be true and after 2011, more tourists visited the lacquerware museum because of the lack of an entrance fee. The museum staff explains to the tourists about the process of making lacquerware in English. If tourists want to observe practical work of students and teachers, they can do so. If students are not at practical sessions then, tourists cannot observe them. The college students come from all over Myanmar but mostly from near Bagan and Shan state.

One of the teachers from the Lacquerware Technology College said that:

“There are only few students who join the lacquerware industry when they finish their studies because of other job opportunities these days. There are few among the new generation who want to join the lacquerware industry. The students whose family business is lacquerware will likely join the lacquerware industry”

The teacher continued that:

“The government provides the raw material for practical work because they are very expensive. The students do not need to pay anything. Moreover, the government also provides dormitory facilities for the students at very cheap rental.”

So, it can be noticed that the government encourages the lacquerware industry by giving a lot of support to the students at the Lacquerware Technology College. In order to encourage more students to join the college and even engage in the

lacquerware industry, they also made a bridging system to other colleges for further education.

A teacher at the Lacquerware Technology College said that:

“The sustainability of the lacquerware industry largely depends upon the market and availability of craftsmen. If the demand of lacquerware is high, this industry will become sustainable.”

Moreover, for the continued sustainability of lacquerware art, the college provides short term vocational training to people not only in Bagan but also all over Myanmar. If a village requests the college to provide handicraft training at their village they also do so. The college provides vocational training not only in lacquerware art but also in other bamboo handicraft. Moreover, if lacquerware entrepreneurs request the college for specific training, the college provides short term training based on their request such as design, coloring etc.

In order to improve themselves, most of the teachers at the Lacquerware Technology College studied new techniques of lacquerware in Japan. Teachers who come back from Japan always held workshops and paper presentations every year. The purposes of these workshops are to disseminate new and modern technologies of lacquerware art to lacquerware entrepreneurs in Bagan. Moreover, the teachers who came back from abroad want lacquerware entrepreneurs to engage in innovative design and other techniques without affecting traditional art techniques.

Another teacher at the Lacquerware Technology College said that:

“Some small lacquerware entrepreneurs in Myin-Ka-Bar village think that these workshops are useless. But, most big lacquerware entrepreneurs attend those workshops and thought that they got new technologies and innovative designs shared by teachers.”

She continued that:

“Lacquerware entrepreneurs need to create new designs for the sustainability of lacquerware in the market”

So, it can be noticed that the college provides training and disseminates new technologies for the sustainability of the lacquerware industry. In addition, Japanese lacquerware technicians have come and taught short term courses pertaining to design and modern techniques of lacquerware art at the Lacquerware Technology College for over ten years. But, small lacquerware entrepreneurs are narrow-minded and they cannot see the value of the new technologies and innovative designs for the sustainability of their business. They think that just because they are doing small enterprises they do not need to learn anymore. The knowledge they have is enough for them. They think that they are experts in their work. This is because most of them only have primary education and thus cannot see or plan for the long run. But, for the big lacquerware entrepreneurs, they know and understand the value of that knowledge they get at the college and they can see and plan for the future.

Moreover, other lacquerware entrepreneurs share their knowledge and experiences at the workshop in the college. For example, the threat for the sustainability of lacquerware industry in these days is lack interest by the new generation. So, some entrepreneurs share how to solve this problem. Last year, one big lacquerware entrepreneur shared at the workshop his own experiences on how he solved the lack of professional lacquerware craftsmen. He said that he found youth who lived far away from Bagan and supported them by giving them meals and accommodation. He employed them as lacquerware trainees by providing small wages. As these trainees hail from villages far away from Bagan, they do not have any motivation to work at other jobs in tourism industry such as hotel staff, waiters etc. In their native villages, they do not have many job opportunities. They had only one choice which was to work as farmers. Thus they are obedient and humble. Moreover, they are loyal to the boss which means that they will not move to other lacquerware workshops. So, they will learn the lacquerware art and become professionals in future who will in addition to being trained also be loyal and work

only at the workshop where they learnt. Almost all entrepreneurs know that they cannot get Bagan-born young men and women to be employed at the lacquerware industry especially among the younger generation. Most youth in Bagan have high expectations to work in the tourism industry. They are not interested in the traditional art of lacquerware. Although the lacquerware entrepreneurs know it, they do not have any solution for the problems of the lack of younger generation to participate in the industry. Moreover, all big and small lacquerware entrepreneurs have never met and had a discussion pertaining to the sustainability of their business. But, now they could discuss and share their knowledge at the workshop in Lacquerware Technology College. Some of big lacquerware entrepreneurs proceeded to follow the methods espoused by their colleague to get new younger staff who will be able to sustain the industry in the future. So, it can be noticed that the Lacquerware Technology College support directly and indirectly for the sustainability of lacquerware industry.

The teacher said that craftsmen who learnt and worked in lacquerware in Myin-Ka-Bar village are more practical. They are learning by doing. They are more skillful than the students at the Lacquerware Technology College. It is because the students study not only lacquerware art but also Co-operative subjects. They cannot spend the whole day at practical work like trainees at outside workshops. Some of the college students also did not get good grades in the Matriculation exam and thus want to join other institutes such as the Economic and Co-operative Institutes. As the Lacquerware Technology College has a bridging system to join the Co-operative University, many of those who joined actually have low interest and motivation in handicraft art, as they are more interested in academic subjects such as management, account and statistics. Due to this, they are not good at in lacquerware art. But, some students are really interested in lacquerware art and they become skillful craftsmen when they finish the two year diploma course. Moreover, they can learn innovative designs and new technology of lacquerware art from foreign-trained teachers. So, whether skillful craftsmen can be produced at the Lacquerware Technology College largely depend upon the mindset of students whether they are really interested in lacquerware art or some students who are only interested in other co-operative subjects and attending the college in order to go on to bridging courses elsewhere.

Moreover, the teacher continued that:

“After 2011, there are more lacquerware workshops and shops because of high market demand due to tourism development. However, lacquerware entrepreneurs are more innovative to produce good, medium and low quality products according to market demand. There is more competition in the market. But, there is no organization that exists among entrepreneurs to discuss and solve the difficulty they faced currently.”

There is no any organization of lacquerware entrepreneurs or craftsmen which is a barrier for sharing knowledge and experience. Moreover, for small entrepreneurs, they cannot get a collective voice to get fair price for their products. In addition, craftsmen also cannot make claims for their rights. The principal of the Lacquerware Technology College wants to organize and begin a “Lacquerware Lovers Association” which may become a first step towards organizing other lacquerware organizations.

### **5.3 Conclusion**

To sum up, as the saying goes, “A little is better than nothing”. There are a few among the new generation who want to learn lacquerware art currently. Even if a few students join the lacquerware industry after they finish their diploma course, it will provide a lot of support for the sustainability of the lacquerware industry in Bagan. Moreover, vocational training of handicrafts all over Myanmar provided by the college helps a lot in disseminating and sharing the knowledge of traditional art as well as sustainability of the lacquerware industry. The workshops and seminars organized by the college lend a lot of support in sharing knowledge and experience between entrepreneurs. In addition, the idea of a “Lacquerware Lovers Association” could be the precursor for other lacquerware organizations for lacquerware entrepreneurs and craftsmen. So, the Lacquerware Technology College helps in the future sustainability of the lacquerware industry although some small lacquerware entrepreneurs remain ignorant of the value of the college towards the industry and its future.

In this chapter, the role of Lacquerware Technology College is discussed. The Lacquerware Technology College does lend a lot of support for the sustainability of lacquerware industry by producing new generations of handicraftsmen the skill and technology, teaching modern techniques and innovative designs. There are also lacquerware experts from Japan who provide training annually at the college. The Lacquerware Technology College will be more successful and lacquerware industry will improve if some improvements can be made at the college such as teaching how to establish small enterprises; how to do marketing of lacquerware products for tourists, trying to get more interested small lacquerware entrepreneurs to join the courses provided by the college, disseminating widely the knowledge and designs of lacquerware art, holding more workshops and seminars, more practical work for students, and finally; by increasing the participant numbers at the college by accepting more than 200 students every year.

Now, all components related to lacquerware industry have been discussed. So, the next chapter is the final concluding chapter which brings together all the information discussed and offers some recommendations.



## **CHAPTER VI**

### **CONCLUSION AND RECOMMENDATION**

#### **6.1 Conclusion**

Bagan is one of the most famous tourist sites in Myanmar. The two main attractions of Bagan are ancient pagodas and lacquerware souvenirs. Almost all tourists who come to Myanmar visit Bagan while most of the inhabitants in Bagan work in tourism-related businesses. Tourist arrivals in Myanmar have influenced the livelihood of inhabitants in Bagan.

Myin-Ka-Bar village is just 11 km away from Bagan. All tourists have to cross the main road at the center of Myin-Ka-Bar village to visit the ancient pagodas. Thus Myin-Ka-Bar village is the heart of the lacquerware industry in Myanmar. Previously, different lacquerware industries could be found all over Myanmar especially in Shan state and central Myanmar. At that time, lacquerware was mainly used as daily utensils because the price was not very expensive compared to today and there were not many alternatives for daily utensils. When the State Law and Order Restoration Council (SLORC) opened up the national economy to a market economy in 1990, other utensils such as plastics and steel replaced lacquerware utensils simply because they were cheaper as well as being better for household use. So, lacquerware became only restricted to become souvenirs items instead. This caused a decline in the lacquerware industry which was worsened off by the combined factors of low demand, expensive raw materials, high price and lack of the younger generation in lacquerware industry. However, tourism promoted and supported the sustainability of lacquerware industry in Bagan.

As Theobald (1995) mentioned economic impacts of tourism function in various ways to stimulate the host economy and the livelihood of its people. The lacquerware industry in Myin-Ka-Bar however, has been and will continue to be sustainable for a long time because international tourists in Bagan visit lacquerware

workshops and buy lacquerware souvenirs. International tourists are very much interested in hand-made souvenirs which are very beneficial since almost all of lacquerware is made by hand at every step of the process. So tourists who are actually here to visit Bagan for the pagodas have become equally attracted to the beautiful art of lacquerware which is housed here and its traditional handmade intricate craft which has proven to be a great attraction for them. It is quite clear that the lacquerware industry in Myin-Ka-Bar has been sustainable because of tourism. As mentioned above, the lacquerware industry disappeared in other areas in Myanmar because of no local demand and no tourist sites in those areas. In a situation different from that, the lacquerware industry in Bagan has thus been and will continue to be sustainable because of high demand created by tourism development. This proves the theory of Allock (2006) and Anna (1996) who said that the growth of tourism provides incentives for local people to promote local handicraft businesses and stimulates local entrepreneurship by providing goods and services that could never been supported before in the local economy. But, tourism does not always bring positive impacts for local community.

On the other hand, the UNEP pointed out that economic dependence on tourism, and the existence of seasonal character jobs are negative impacts of tourism. The tourism industry is not always good for the lacquerware industry especially since it is uncertain and seasonal. The sudden decline in tourism in Myanmar because of international sanction and boycotts to the Military government before 2011 hit tourism-related businesses hard in Myanmar as a whole. The decline in tourist arrivals in Myanmar negatively affected the livelihood of the people in Bagan. The main problem is that they had no alternative markets for lacquerware souvenirs as well as no alternative form of livelihood. They totally relied on only international tourism. They did send lacquerware to other towns such as Yangon and Mandalay but unfortunately these markets were also those who also relied on the tourism industry. Only a few big lacquerware entrepreneurs in Myin-Ka-Bar had an export market. Thus, although the business was not good, big lacquerware entrepreneurs could stay on in Myin-Ka-Bar village despite troubled times and the absence or decline of tourists. But, for small entrepreneurs and craftsmen, times like these

caused them to be unable to continue in their main career of making lacquerware souvenirs. They had to work in construction sites, hunt for treasure near ancient pagodas and even migrate to other towns during the worst tourist decline in 2000, 2007 and 2008. Fortunately, craftsmen in Myin-Ka-Bar village could rely on the Myawaddy market by producing low quality, cheaply priced products from 2002 to 2007. But, the demand was not very high and only a few people could depend upon it.

Neto (2003) also said that tourism is the most promising driving force for economic development in most developing, least developed countries and small islands states. After 2011, the record-breaking number of tourist arrivals in Myanmar post-democratization caused the government to improve infrastructure for tourists as well as to once again grow a large tourist-based local economy in order to serve the tourists. The increase in tourist arrivals lead to huge improvements in tourism-related businesses such as hotels, restaurants, tour companies, tour guides, airlines, car rentals and souvenirs. The demand of lacquerware products, souvenir for international mass tourism in Bagan, also increased, contributing to the reestablishing of many small lacquerware enterprises in Myin-Ka-Bar village. Moreover, in the post-2011 period, even the big lacquerware workshops could provide full employment to the lacquerware craftsmen for the whole year with fair wages. It proved the theory of Fretchling & Horvath (1999) who theorised that tourism produces a multiplier effect in the host economy, focusing on five effects in particular; transaction of sales, output, income, revenue and employment.

Making lacquerware takes a long time and is extremely labour intensive because all processes in the making of it are hand-made. There is no gender discrimination in making lacquerware. So, the high demand of lacquerware after 2011 created more job opportunities for both men and women. According to Manyara & Jones (2007) a high proportion of women can work and establish micro-enterprises in the tourism sector, thereby leading to the empowerment of women in the tourist destination.

On the other hand, Anthropologist David V. Carruthers (2001) said that handicraft communities faced many structural barriers to the improvement of their

business. Although the business was good and 80 % of households established small lacquerware enterprises in Myin-Ka-Bar village after 2011, they still had to rely on big lacquerware shops which are located on the road side. The small lacquerware entrepreneurs could not sell their products to the tourists directly. There were only five big lacquerware shops in Myin-Ka-Bar village and small lacquerware enterprises had to rely on middlemen to sell their products to big lacquerware shops in Myin-Ka-Bar, Bagan, Nyaun-Oo and small lacquerware shops at pagoda stalls. It proved the theory of David V. Carruthers (2001) who said that some handicraft sellers became successful and their products were sold under the umbrella of famous brands that supported them in getting higher prices for their handicraft products in the market. Big lacquerware industry are located on the road side and there are big and beautifully-decorated lacquerware showrooms which are attached together with lacquerware workshops where tourists can not only buy lacquerware handicraft but also observe the lacquerware making process. They have their own brands and contacts with tour guides. The big lacquerware shops not only produced the lacquerware souvenirs at their own workshop but also bought from small lacquerware enterprises because they needed to collect and keep lacquerware souvenirs to meet the high demand in peak tourist seasons in Myanmar. In Bagan, the experience of 2013 where the big lacquerware industry could not keep up to the demand of the tourists' souvenirs proved that their own products could not meet the high demand.

However the big lacquerware shops monopolize the market. The study of handicraft society in Mexico by David V. Carruthers (2001) revealed out that big handicraft shops became gatekeepers in the market. Small lacquerware entrepreneurs in Myin-Ka-Bar village had a similar experience to this. Small entrepreneurs had to sell their products to the big lacquerware industry because their investments are big and they could not keep their products for a long time. But, they could get a higher price if they kept and sold their products during the tourist peak season in November, December and January. Although the small entrepreneurs could not get a high return on their investment, their livelihoods are much better than before 2011. They do not need to work at construction sites or migrate to other areas. Moreover, they now are able to send their children to attend other professional training such as computer

classes and language classes to enable them to join in tourism service industry in the future. The trend of lacquerware production by big lacquerware workshops and small lacquerware workshops are different.

While big lacquerware workshops produce only good quality products, small enterprises cannot maintain the quality of their products. The small entrepreneurs modify traditional techniques to produce medium quality products because they cannot get a high price for their products when they sell their products to big lacquerware entrepreneurs. Another interesting point is that big lacquerware shops sell only lacquerware items, marketing all kinds of lacquerware products such as small lacquerware souvenirs, lacquerware utensils, big lacquerware furniture, medium and good quality products. But, they do not sell other souvenirs together with lacquerware souvenirs. After 2011, the demand of big lacquerware furniture is high because of emergence of credit card and shipping companies brought in by the economic transformation and political openness after 2011. Alongside the increase demand of lacquerware, there has also been a renaissance for lacquerware-related businesses which have improved such as resin, bamboo and furniture. Another improvement after 2011 in Myin-Ka-Bar village is that the emergence of two small lacquerware entrepreneurs who not only produce lacquerware souvenirs but also sell their products themselves. Although they cannot compare with other big lacquerware shops in Myin-Ka-Bar village, they try to find customers with their own strategies. The interest of young generation to work other tourism-related service industry is also important consideration for the sustainability of lacquerware industry.

Ratz (2000) said that new employment generated by tourism industry can result in an increased mobility of the unemployed youths and women in a tourist country. Most of the youths in Myin-Ka-Bar village would rather work in the tourism service sector such as hotel staff, waiters at restaurant than working at their traditional handicraft lacquerware industry. The lack of interest amongst the younger generation in the lacquerware industry is a threat to the sustainability of the lacquerware industry. Among the four steps of making lacquerware, drawing designs is the most difficult and there are only a few in the new generation who have learnt how to draw designs.

Bagan lacquerware is famous for its design and quality. In future, there may be only a few professional lacquerware designers who can draw any kinds of designs. In future, there may be only some designers in Myin-Ka-Bar who can draw after a fashion. According to Acharya (2006), Terzidou & Stylidis (2006), alterations in the traditional occupation of the locals is a result of tourism development. They said that tourism development applies pressure on traditional working patterns causing them diminish and lose of their originality and unique flair. The Lacquerware industry in Myin-Ka-Bar village faces a similar problem like this because of the lack of interest of the new generation to join traditional lacquerware handicraft industry. So, it can be said that new employment opportunities created by tourism development contributed to threat for the sustainability of lacquerware industry. The role of government is also important for the sustainability of lacquerware industry.

The government does not lend direct support to lacquerware entrepreneurs for ensuring the sustainability of lacquerware industry although it levies taxes on big lacquerware industry. But, the government helps indirectly by supporting the existence and continuing work of the Lacquer Technology College. The lacquerware college plays an important role for the sustainability of the lacquerware industry in Bagan by producing new craftsmen, providing handicraft training in the villages, supporting the need of lacquerware entrepreneurs, holding workshops and seminars as well as organizing meetings for lacquerware entrepreneurs.

In summary, tourism development in Myanmar after 2011 is like a double-edged sword for the lacquerware industry in Myin-Ka-Bar village because it brings both positive and negative impacts on this industry. However, tourism has brought more positive impacts on lacquerware industry such as full employment throughout the year and high demand for products. Lacquerware industry in Bagan has and will only be sustainable because of strong market demand from tourism. So, it can be concluded that tourism strongly influences the sustainability of the lacquerware industry in Bagan.

## 6.2 Recommendation

For the sustainability of lacquerware handicraft in Bagan, the government and local community should initiate and maintain collaborative efforts. These are some recommendations they should consider engaging in such as:

- (1) Government should implement community-benefitting tourism initiatives. Although government has formulated a “Tourism Master Plan (2015-2020)”, there is no clear plan in this for community-benefitting tourism.
- (2) Government should encourage craftsmen to become small lacquerware entrepreneurs by providing loans at low interest and by establishing a small handicraft market in Bagan in which small entrepreneurs can rent shops at a reasonable price.
- (3) Government should attempt to cease logging because the forest is very important not only for environmental conservation but also for the availability of inputs for handicraft business and indigenous medicine. To maintain lacquerware art, government at least should maintain *Melanorrhoea usitata* trees in the forest because it is the only source for lacquerware resin. Government should officially announce measures which are designed to increase maintenance of these trees in the forest.
- (4) The Lacquerware Technology College should provide not only vocational training for lacquerware art but also in marketing handicraft in the tourism industry. Moreover, the Lacquerware Technology College should be more focused on practical work for making lacquerware souvenirs. The Lacquerware Technology College should also try to upgrade its capacity to accept more students. The Lacquerware Technology College should make more efforts to disseminate the value of seminars and workshop at the college to attract more participants of small lacquerware entrepreneurs.

- (5) Big lacquerware entrepreneurs, small lacquerware entrepreneurs and lacquerware craftsmen should initiate moves to form a lacquerware entrepreneur association and lacquerware craftsmen association as soon as possible. The Lacquerware Technology College should help in forming those lacquerware associations which will help protect the industry's interests.
- (6) Both big and small lacquerware enterprises should always try to innovate designs while maintaining traditional art, designs and techniques.





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## APPENDIX

### Questionnaire

1. Could you please tell me the situation of lacquerware industry before and after 2011?
2. What is the relationship between tourism industry and lacquerware industry?
3. Apart from selling lacquerware souvenirs to international tourists, which other towns do you send lacquerware souvenirs?
4. Do lacquerware craftsmen transfer other tourism-related jobs after 2011?
5. Do you think that there is direct relationship between increase in tourism industry and improvement of lacquerware industry?
6. How do you maintain lacquerware industry when tourism decreased before 2011?
7. Can you tell me your experience in lacquerware industry since you joined this industry?
8. Are there other family members who work other livelihoods apart from lacquerware?
9. Do you sell other souvenirs in your shop?
10. Can you please explain to me the demand of lacquerware souvenirs from international tourists and local pilgrims?
11. How do you produce low, medium and good quality lacquerware souvenirs?
12. Why do you produce low quality products?
13. How do you manage lacquerware enterprise to be sustainable as domestic business?
14. Do you think that lacquerware industry can be sustainable if tourism industry is not good in Bagan?
15. Could you please explain to me the value chain of lacquerware industry?
16. Could you please explain to me how you buy raw materials and sell your lacquerware products?
17. Could you please explain to me the role of middlemen in lacquerware market?
18. How long have you been working in lacquerware industry?
19. How many family members do you have?

20. Could you please explain the education level of your children?
21. How many family members do participate in your lacquerware enterprise?
22. Do the income from lacquerware enterprise make both ends meet?
23. When tourism industry was not good, can you rely on lacquerware industry for your livelihoods? If not, how did you survive?
24. How do you think whether it is difficult to promote small lacquerware entrepreneur from a lacquerware craftsman?
25. What kinds of benefits do you get from tourism development after 2011?
26. Do you have other job opportunities in tourism industry?
27. Are there any family members who involve in other tourism-related jobs?
28. Do you have regular annual income from lacquerware industry?
29. Will you ask your children to join lacquerware industry?  
If (yes, no), why?
30. Did you have experience of jobless before 2011?
31. If you were unemployed, how did your family survive?
32. Did you borrow money to support your family because of insufficient income?
33. How does lacquerware enterprise support for your family income?
34. Could you please explain to me the market of plastic lacquerware?
35. Do you think that the plastic lacquerware negatively affect the market of real lacquerware?
36. How do you think whether only income source from lacquerware can support the whole family?
37. Does lacquerware industry significantly improve when tourism developed after 2011?
38. Could you please explain to me lacquerware-related businesses?
39. How do you think the participation of new generation in lacquerware industry?
40. How do you persuade new generation to join lacquerware industry?
40. Do you get any support from government for the sustainability of lacquerware industry?
41. Could you please explain to me the support of lacquerware college?
42. Could you please explain to me the history of lacquerware college?
42. How many do students join lacquerware college annually?

43. Do students join lacquerware industry after they finish their diploma course at lacquerware college?
44. What are the regions/native of students who join lacquerware college?
45. Does lacquerware college get final support from government?
46. Apart from teaching, what activities does lacquerware college perform for the sustainability of lacquerware industry?
47. Does international lacquerware technicians come and teach modern lacquerware techniques?
48. Are there any foreign exchange program at lacquerware college?



## VITA

Zar Ni Maung was born and raised in Mandalay, Myanmar. As soon as he finished his matriculation exam in 2000, he began working at Food and Beverage company as a Personal Assistant to the Deputy Director and Computer Operator. During this time, he undertook a degree course, majoring in English. Once graduated, with a B.A in English in 2005, his work experience had amounted to 5 years. It is during this time that Zar Ni Maung found his passion is for humanitarian and development work and as a consequence left the company and began to improve his capacity.

When Nargis Cyclone struck in Ayeyarwaddy Delta, Myanmar in 2008, he had an opportunity to implement his dream of working within a humanitarian and community development field. He joined the Myanmar Red Cross Society as a “Field Officer” at “Nargis Cyclone Relief & Recovery Program” until the project finished in 2011. With this, he joined “Master of Development Studies” program in Yangon Institute of Economics to upgrade his capacity to continue with this line of work in the future. Whilst studying at the Yangon Institute of Economics, he won “Mekong Institute & New Zeland Ambassador’s Scholarship” which provided research training as well as a substantial grant for his Masters thesis. He went to Mekong Institute in March, 2013 to attend a one month intensive research training with a focus on “Rural Development”. He presented his research findings at Mekong Institute in August, 2013. As a consequence, he was awarded a scholarship from the Hinrich Foundation and ASEAN-Chula scholarship to join “Master of Arts in International Development Studies” at Chulalongkorn University in September, 2013.

After completion his second Masters degree in Chula in Nov, 2014, he will devote his life to community development in Myanmar. He believes that the knowledge he got from the MAIDS program will help him improve his life as well as the community, as it will enable him to pursue a career in development in Myanmar. His research interests are community development, rural development and tourism industry. Zar Ni Maung has learnt to balance academia, a career and volunteer jobs throughout his life with strong motivation, ambition, perseverance and adaptability.