

Dissemination Workshop

(Mid - Term Project Steering Committee (PSC) Meeting)

Research on Cross - Border Value Chain Bottlenecks in the SEC

Mid – Term Review (MTR)
of the Project on Enhancing Competitiveness of SMEs
in the SEC of ASEAN Mekong Subregion (AMS)

November 13, 2017



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**Research on Cross-Border Value Chain Bottlenecks in the Southern
Economic Corridor (SEC)**

**Mid - Term Review of the Project on "Enhancing Competitiveness of
Small and Medium-sized Enterprises (SMEs) in the Southern Economic
Corridor (SEC) of ASEAN Mekong Subregion (AMS)**

November 13, 2017

Mekong Institute (MI)
Khon Kaen, Thailand

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Lastly, our sincere appreciation also goes to the Project Team of MI Trade and Investment Facilitation (TIF) Department for their valuable inputs and arrangements for the Dissemination Workshop, and all MI staff members for their support and assistance.

**Trade and Invest Facilitation (TIF) Department
Mekong Institute
November 2017**

Executive Summary

The significant results and findings from the two researches on (i) cross - border value chain bottlenecks in the Southern Economic Corridor (SEC); and (ii) the mid - term review (MTR) of the project on “enhancing competitiveness of Small and Medium-sized Enterprises (SMEs) in the Southern Economic Corridor (SEC) of ASEAN Mekong Subregion (AMS)” were shared in a Dissemination Workshop organized by the MI on November 13, 2017 in Bangkok, Thailand.

The Workshop was attended by the organizations that represent Project Steering Committee (PSC). These organizations included Asian Development Bank (ADB), the Japan International Cooperation Agency (JICA) and Japan External Trade Organization (JETRO), as well as concerned ministries and business associations (BAs) in Cambodia, Myanmar, Thailand and Vietnam (CMTV). The Workshop sought to provide PSC members with a better understanding of the opportunities and constraints in the CMTV as well as lessons and experiences gained in the Project’s ongoing implementation.

Results of the Project MTR revealed the clusters’ positive reception and their application of the knowledge and skills gained from training program and related interventions initiated to improve business practices. Particularly, the importance of established networks among the stakeholders in the 19 SEC provinces with MI has been identified as a vital contributing factor to the development of the economic corridor in the long run. The report also noted the high expectations on the SEC Business Database, which has been identified as a major tool that will facilitate the integration of the SMEs into the regional and global value chains.

Meanwhile, the research titled “Cross-Border Value Chain Bottlenecks in the SEC” aimed to uncover the situation and function of the SEC and subsequently recommended business solutions that will boost the competitiveness of the SME sector. The research noted the potential of the SEC as an innovation hub, and recommended local - to - local cooperation between cluster members of the SEC, and setting up SEC GO!, a platform designed to improve prompt reporting and promote increased ownership between producers and customers, as some mechanisms to address bottlenecks in the SEC.

Both researches were conducted in the first half of 2017. Results and findings from these researches will be used to improve future project implementation including the design of the Project’s Phase Two.

Abbreviations / Acronyms

ADB	Asian Development Bank
AMS	ASEAN Mekong Subregion
BOT	Board of Trade of Thailand
BA	Business Association
BDS	Business Development Service
CC	Chamber of Commerce
CCI	Chamber of Commerce and Industry
CLMV	Cambodia, Laos, Myanmar and Vietnam
CMTV	Cambodia, Myanmar, Thailand and Vietnam
CSV	Creating Shared Value
C2C	Consumer to Consumer
EEC	Eastern Economic Corridor
FDI	Foreign Direct Investment
FGD	Focus Group Discussion
FTI	Federation of Thai Industries
GMS	Greater Mekong Subregion
JAIF	Japan – ASEAN Integration Fund
JETRO	Japan External Trade Organization
JICA	Japan International Cooperation Agency
KII	Key Informant Interview
MI	Mekong Institute
MoIT	Ministry of Industry and Trade
MTR	Mid - Term Review
PSC	Project Steering Committee
R&D	Research and Development
SEC	Southern Economic Corridor
SME	Small and Medium - sized Enterprise
SEZ	Special Economic Zone
TIF	Trade and Investment Facilitation
UMFCCI	Union of Myanmar Federation of Chamber of Commerce and Industry

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1. Background

Funded by the Government of Japan through ASEAN - Japan Integration Fund (JAIF), the Mekong Institute (MI) is implementing a two - year project on “Enhancing Competitiveness of Small and Medium-sized Enterprises (SMEs) in the Southern Economic Corridor (SEC) of ASEAN Mekong Subregion (AMS)” for the period 2016 – 2018. The Project is implemented with the collaborations between MI and its stakeholders in the four countries along the SEC, namely Myanmar, Thailand, Cambodia, and Vietnam (CMTV) at both national and sub-national levels.

(i) The Research on Cross-Border Value Chain Bottlenecks in the SEC

As one of the activities under the project, MI implemented “the research on cross - border value chains bottlenecks in the SEC.” The research aimed at mapping of the sectoral and geographical trade flows of the 19 SME cluster products in the SEC and identifying bottlenecks of the trades of the products and exploring policy changes to promote cross border trade in the SEC. In particular, the research (i) assessed the regional market demand, opportunities and constraints in the CMTV for the 19 products selected for the project; (ii) assessed the cross - border value chain bottlenecks; (iii) assessed the regulatory environment for the trade of the specific products; and (iv) identified grounds for policy changes for increasing cross - border trade.

MI Trade and Investment Facilitation (TIF) Department, together with the external consultant, implemented the research through (i) review of secondary data, including project related documents, legal and technical documents related to private development in the SEC in CMTV and other relevant documents; and (ii) meetings with the project direct beneficiaries and stakeholders in the border provinces along the SEC in CMTV. The research team conducted field survey on March 14 - 23, 2017 in nine border provinces in the SEC in CMTV, namely Tanintharyi Region / Dawei, Kanchanaburi, Sa - Kaeo, Banteay Meanchey, Svay Rieng, Kampot, Koh Kong and Tay Ninh provinces. The team came up with the research report on November 2017.

(ii) The Project Mid - Term Review (MTR)

As the project has passed half way through its duration, MI conducted the project mid - term review (MTR) during July - August 2017. The MTR reviewed the project situation and progress of the project against the stated outputs and outcomes, monitored the implementation to improve the project results towards sustainability, and identified issues and recommended inputs for new project development. The MTR also addressed the issues and challenges, and provided supportive recommendations to the project based on the project activities implemented during February 2016 – June 2017. The study team conducted field visits to 19 project provinces in the SEC in CMTV on July 9 – August 4, 2017. The fieldwork collected the data for the MTR through a series of focus group discussion (FGD) and key Informant Interview (KII) with project stakeholders including Chamber of Commerce and Industries (CCIs), Business Associations (BAs), provincial trade

and industry - related departments and SME product clusters from 19 SEC Provinces in CMTV. The MTR report was completed and submitted to JAIF Management Team (JMT) in ASEAN Secretariat in October 2017.

(iii) Dissemination Workshop

As an integral part of the Project, MI organized a Dissemination Workshop to share the results of the (i) research on cross - border value chain bottlenecks in the SEC; and (ii) MTR of the Project on Enhancing Competitiveness of Small and Medium - sized Enterprises (SMEs) in the Southern Economic Corridor (SEC) of ASEAN Mekong Subregion (AMS) with the members of Project Steering Committee (PSC). The Workshop was held on November 13, 2017 at Bangkok, Thailand.

2. Objectives and Expected Outputs

The objectives and expected outputs of the Dissemination Workshop were to:

(i) The Research on Cross - Border Value Chain Bottlenecks in the SEC

- Share and validate the research results with the PSC members emphasizing on:
 - Opportunities and constraints in the CMTV for the products selected for the Project;
 - Cross-border value chain constraints including relevant regulatory constraints and the process flows of the regulatory requirements;
 - Specific recommendations for the enhancement of cross - border trade for the products selected for the project. These recommendations are expected to be inputs for necessary policy changes to ease cross - border trade.

(ii) The Project Mid - Term Review (MTR)

- Share the project implementation status as of June 2017;
- Share the findings and recommendations from the Project MTR;
- Share lessons learned and experiences gained and provide inputs for the further implementation of the Project including the Phase 2.

3. Expected Outcomes

The Workshop aimed to achieve outcomes as follow:

(i) The Research on Cross - Border Value Chain Bottlenecks in the SEC

- The research results discussed and agreed by the PSC;
- The PSC members acknowledged the identified opportunities and constraints in the CMTV for the products selected for the Project;
- The PSC members gained understanding of the cross - border value chain constraints including relevant regulatory issues and the process flows of the regulatory requirements;
- The PSC members agreed with the specific recommendations for the enhancement of cross - border trade for the products selected for the project.

(ii) The Project Mid - Term Review (MTR)

- Project implementation status (achievements, challenges and lessons learned) as of June 2017 were reviewed, discussed and examined by the PSC members;
- Findings and recommendations of the Project MTR were discussed and agreed by the PSC members;
- Suggestions and recommendations for the further implementation of the Project, including the Phase 2, were provided by the PSC members.

4. Participants

Total of 18 participants, representing PSC members from regional organization, Japan and CMTV, consultants of the two researches as well as MI staff attended the Dissemination Workshop.



5. Workshop Introduction

5.1. Welcome Remarks

Dr. Watcharas Leelawath, Executive Director, Mekong Institute



Dr. Leelawath welcomed all delegates to the Dissemination Workshop. He highlighted that the Workshop is one of the important activities under the Project supported by the JAIF, which is to validate the results of two researches conducted as part of the Project framework. The research on cross - border value chain bottlenecks in the SEC illustrates the obstacles in the trade flow in the SEC, and provides recommendations to enable

freelier, easier and faster cross - border trade. Also, the Project MTR provides key results, best practices and lessons learned from the first year of the project implementation. They will be used as the reference for the activities that will be implemented in the remaining project period and also for the 2nd phase of the Project. Dr. Leelawath stressed that the MI would like the project to be implemented in a demand driven manner and the observations, suggestions, recommendations, views and ideas from the project countries are very important. He requested the PSC members for their active participation during the country reflection session.

5.2. Workshop Objectives

Mr. Madhuriya Kumar Dutta, Director, Trade and Investment Facilitation (TIF) Department, Mekong Institute (MI)



Mr. Dutta oriented the delegates with the workshop objectives, which were to validate the results and findings of the two researches conducted as part of the Project. For the research on cross - border value chain bottlenecks in the SEC, Mr. Dutta mentioned that the MI, as an outcome of the research, would like to come up with the policy recommendations and forward them to national governments of CMTV for the

seamless trade in the SEC and for the enhancement of cross - border trade in the GMS. As such, Mr. Dutta stressed the importance of the PSC members to provide their inputs and feedbacks to the research results and findings.

For the Project MTR, Mr. Dutta also requested the PSC members for their specific inputs, feedbacks, views and ideas, especially to build up new project ideas, based on the results that have been achieved so far. He mentioned that the project is with two year duration and it may not be possible to showcase significant results and real feedbacks within this period. Therefore, he stressed the MI's interest in the continuation of the project for another 3 - 5 years by identifying new activities and applying for the funding.

6. Presentations and Discussions

6.1. Research on Cross - Border Value Chain Bottlenecks in the SEC

Mr. Daisuke Matsushima, Professor, Nagasaki University



Mr. Matsushima presented the results and findings from the research on cross - border value chain bottlenecks in the SEC. In particular, his presentation focused on (i) research findings; (ii) policy recommendations; and (iii) Action Plan (AP) for the further development of clusters.

(i) Research Findings

The study discussed the opportunities and constraints in the respective twin borders for the enhancement of cross - border trade. Details are as follow:

Myanmar - Thai Border

For Thai side, not only hard infrastructure, but also operation or soft infrastructure is now also improved compared to previous time. For instance, this passport control at border immigration office now opens since 7:30am onwards, which contributes to easy and efficient transportation between two countries. As such, daily necessity goods are transported from Thailand to Myanmar and "Made in Thailand" is accepted as brand in Myanmar. The traffic in the border is not so bad at the moment. However, it will be necessary in the near future to expand relevant facilities in accordance with the increase in border trade volume. For Myanmar side, some of the facilities related to border control remain same as those of 5 years ago. Yet, according to the Myanmar people, they will be improved within the next 5 years. On the contrary, custom house has been established as new building.

From Thai border to Dawei, the road is under development for tentative pavement. However, for transportation purpose, it is no problem in comparison with the other roads in Asia such as India. Only a few points such as bridge should be improved before the completion of commercial transportation. Thai government is now expressing their interest for the contribution toward developing the connecting road facility between Dawei special

economic zone (SEZ) and Phu Nam Ron (Thai border). Yet, Japanese “Emergency Grant Aid” should also be utilized for the road development between Phu Nam Ron and Myitta (not Dawei SEZ).

In the field research, the research team identified new ideas for connectivity or “Myitta Route.” Myitta Route from Myitta to Dawei city center has already been developed with some expansion or widening for road construction and this route is a bit sideways when it comes to considering the way to Dawei SEZ. However this route has been already developed rather than the route between Dawei SEZ and Myitta. This research implies the route between Myitta and Dawei city center as the most feasible route. Therefore, all stakeholders should reconsider this route to be utilized for transportation.

Cambodia – Thai Border (Central Subcorridor)

Compared to the situation in 2012 - 2013, the passport control at both Cambodia and Thai sides has been upgraded and been smoother than before, although the situation is still messy. Officials at both borders have already gotten some experiences for managing border traffic between two countries. In order to improve border service further as Business Development Service (BDS), traffic rules should be implemented. Traffic accident is serious as vehicle often stuck in the traffic. In the field research, the research team found the clue for increasing traffic from the soft infrastructure development, rather than that of hard infrastructure such as road expansion.

Cambodia – Thai Border (Southern Coastal Subcorridor)



Koh Kong province itself and its SEZ are not so busy in comparison to that of 4 - 5 years ago when large number of Foreign Direct Investment (FDI) was done in Koh Kong Province to set up new factories including Hyundai (Korean company) and Mikasa (Japanese company). However, the investment is decreasing at the moment. As such, traffic volume is also shrinking in the border area for trade or value chain development. Therefore, it is very easy to understand the decrease in the exchange between Koh Kong and Trat provinces, especially for logistics.

However, cross - border tourists are increasing in the area. Trat province has a plan to create tourism cluster in its own destination. However, the travel cost from Bangkok to Trat province is very high. It means domestic land transportation between Bangkok and Trat province in Thailand is rather important than cross - border passenger transportation. Therefore, efficient and appropriate tourist bus system should now be required to be installed in this route.

Cambodia - Vietnam Border (Central Subcorridor)

Transportation infrastructure between Cambodia and Vietnam is being improved with the establishment of “Tsubasa Bridge” over the Mekong River just after Phnom Penh capital area. This bridge has created new trade traffic between two countries for new market access not only to the domestic market in metropolitan areas in both countries, but also toward the global market via mega seaport in both countries.

The study discussed the technology and technological knowledge required, as well as demands by each cluster for their further development. Details are as follow:

Table 1: Required Technology and Technological Knowledge by the Clusters

Province	Cluster	Technology and Technological Knowledge in Need
Dawei	Mackerel	Cold Chain and Storage
Kanchanaburi	Banana Processing	QC & Enhancing Functional Food and Value-Addition
Sa-Kaeo	Aromatic Herb	Package Development & QC
Banteay Menchey	Silk Production	Sericulture 2.0
Koh Kong	Fish Sauce	Inspection and Value Addition
Trat	Community Based Tourism (CBT)	High-End Bus System
Svay Rieng	Smach Rice Production	Enhancing Functional Food
Tay Ninh	Custard Apple	Preservation and Enhancement of Functional Food and Value Addition
Can Tho	Pangasius	Fish Cultivation and Value Addition
Kampot	Natural Salt Flower Production	Inspection and Value Addition

Table 2: Demands by Each Cluster

Province	1 st Demand	2 nd Demand	3 rd Demand
Dawei	Accounting	Consultation	Legal Issues
Kanchanaburi	Logistics	Legal Issues	Accounting
Sa-Kaeo	Logistics	Accounting	Legal Issues
Banteay Menchey	Consultation	Accounting	Logistics
Svay Rieng	Legal Issues	Consultation	Accounting
Kampot	Accounting	Consultation	Logistics Finance
Koh Kong	Legal Issues	Accounting	Logistics
Trat	Consultation	Legal Issues	Accounting
Tay Ninh	Accounting	Consultation	Legal Issues

(ii) Policy Recommendations

The study provided five key recommendations which he believes can solve the bottlenecks in the SEC to cover whole strengthen of each cluster and the corridor as a whole. These include (1) BDS Standard; (2) Biz - Aca Cooperation Standard; (3) Local to local Cooperation Approach; (4) Mezzanine Level Infrastructure - Roadside Station; and (5) SEC GO!

(1) BDS Standard

The most serious factor for clustering or solving the problems in the value chains in the SEC is the BDS. The study defined BDS as more broad vision to be a 'connector' between business to business or government and Academia. As such, BDS is the key figure and they should be provided the training with appropriate method.

(2) Business - Academia Cooperation Standard

In Japan or other developed countries, it can be found that Academia could contribute toward creating business or supporting business network as a catalyst. The study picked up Can Tho University as the case of Biz - Aca Cooperation and said that the University has cooperated with the Nagasaki University, focusing on fishery sciences and technologies. In fact, Can Tho Pangasius cluster is recently facing quite serious challenges for Pangasius cultivation project. If the cluster can solve these problems, this can be a typical example of pilot case for Biz – Aca Cooperation. Based on these outcomes from the pilot case, we can get the best practices of Biz - Aca Cooperation in Mekong to be registered as a method or standard of Biz - Aca Cooperation, which must be one of the effective measures for solving some of the value - chain bottlenecks in the GMS.

(3) Local to local Cooperation Approach (Otagai Method)



The industrial linkage between the GMS and Japan is important. However, there is a need for the implementing body that supports such linkage. Otagai Project conducted by Otagai Forum Association has been a main figure for the operation of the whole picture of a bridge. The Association not only connects both sides but also creates innovation from the region. Innovation is one of the most vital medicines for the GMS and it can be brought

through the new platform located between cross - borders.

(4) Mezzanine Level Infrastructure - Roadside Station

The Japanese experiences of roadside station can contribute toward providing the test market place as well as new research & development (R&D) hub from local food processing and agriculture products in the SEC. They can also show some best practices for inventing new products because so many customers stop at roadside station during their drive.

Roadside station can also support inclusive development and de-centralization of GMS in accordance with infrastructure development such as road and bridge. If each cluster achieves more robust development through roadside station, it can create new demand for transportation and logistics alongside the corridor. Roadside station can enhance some power of local and then to compensate for local distribution for inclusive development. If

roadside station is established in the area alongside the cross - border area, it is good for new business creation as well as tourism promotion in the corridor. In addition, it creates new facilities for drivers, such as a modern restroom or refreshment areas. These soft powers can reduce traffic accident in the corridor and if it adds to build the special facility attached to the roadside station such as “cold chain,” roadside station will be a strong supporting function for agriculture development.

(5) SEC GO!

Final recommendation for clustering with solution against bottlenecks in the SEC is to set up a platform, so called “SEC GO!” This consists of three prominent characteristics: Prompt reporting; updating Information; and any application related to IoT (Internet of Things) in the SEC. Ownership comes from both producers and customers.

(iii) Action Plan (AP) for the Further Development of Clusters

The study also provided the Action Plans (APs) for the further development of clusters (identified by the Project) in the SEC through Otagai Method (clusters’ local to local cooperation approach). In particular, he gave eight examples as below.

- Case 1: Rice Valley (Svay Rieng / Tay Ninh / Prachinburi / Chantaburi / Kanchanaburi);
- Case 2: Maritime Conclave (Preah Sihanouk / Tanintharyi (Dawei) / Ca Mau / Can Tho);
- Case 3: Aqua Cluster (Battambang / Koh Kong / Kampot);
- Case 4: Lactic Acid Flora (Pursat / Chantaburi / Kanchanaburi / Ratchaburi / Sa – Keao);
- Case 5: Moving Cluster (Trat);
- Case 6: Sericulture 2.0 (Banteay Meanchey);
- Case 7: Food Processing Machine Network (Kampot); and
- Case 8: Ceramic Alliance (Kampong Chhnang).

Table 3: Clusters’ Local to Local Linkage

Province	Cluster	Otagai Cluster Location
Banteay Meanchey	Silk Production	Kyoto
Battambang	Fresh Water Fish Sauce	TAMA Cluster
Pursat	Pursat Orange	TAMA Cluster / Niigata
Kampong Chhnang	Pottery & Ceramics	Seto
Svay Rieng	Smach Rice Production	Niigata
Koh Kong	Sea Water Fish Sauce	TAMA Cluster / Niigata
Kampot	Natural Salt	Tokyo
Preah Sihanouk	Dry Shrimp	Nagasaki
Tanintharyi (Dawei)	Mackerel	Nagasaki
Chantaburi	Durian Processing	TAMA Cluster / Niigata
Kanchanaburi	Banana Processing	TAMA Cluster / Niigata
Prachinburi	Organic Rice	Niigata
Ratchaburi	Aromatic Coconut	TAMA Cluster
Sakeo	Aromatic Herb	TAMA Cluster
Trat	Community-based Tourism (CBT)	Himeji
Ca Mau	Dried Snakeskin Gourami	Nagasaki

Can Tho	Pangasius	Nagasaki
Tay Ninh	Custard Apple	Niigata

6.2. Country Reflections

Following the presentation of the research results and findings, PSC members provided important observations, suggestions, recommendations, views and ideas as follow:

Ministry of Commerce (Cambodia)



Now we are in the age of ASEAN Economic Community (AEC) and business enterprises in each country is striving to participate in the regional and global value chains. In fact, each province and country in the region can supply raw materials and can make value addition in other countries. This is the new idea to promote SMEs in the region. Cambodian SMEs currently have limited capacity and capability for value addition such as packaging, branding, trade mark creation and

brand building. They should collaborate and cluster together to create value addition to enhance competitiveness.

Union of Myanmar Federation of Chambers of Commerce & Industry (UMFCCI)

The results and findings from the research show how selected SME clusters in the 19 SEC provinces can do clustering and can exchange information effectively (local to local cooperation approach) which are very important. The Project should be the pilot one for other provinces and countries as well. Regarding cross - border trade, in case of Tanintharyi Region / Dawei, fishery sector is exporting the fish to Thailand through sea route (Ranong). If they can export through land border, it will surely provide additional benefit to them. However, they are still facing resource and financial constraints and require jetty, cold storage, processing system and other necessary infrastructure. They already have business plan but cannot move forward due to these constraints.



However, they are still facing resource and financial constraints and require jetty, cold storage, processing system and other necessary infrastructure. They already have business plan but cannot move forward due to these constraints.

Federation of Thai Industries (FTI)



One of the challenges is the resource availability and financial constraint, as well as rules and regulations for exporting individual product. The research initiates cluster to cluster business (local to local cooperation approach), but it is important to understand the capacity and capability of the SMEs in the value chain and how much resource and finance they can invest. The government rules and regulations as well as availability of

logistics system are also very important for the further development of the SME clusters.

Japan International Cooperation Agency (JICA) Thailand



One of the solutions for sustainable SME cluster development in the SEC is consumer to consumer (C2C) approach, which does not rely much on the support from the public sector. In case of Thailand, in comparison to a few years ago, national development interest has been shifted from the border or corridor development to more domestic one at the eastern part of the country (Eastern Economic Corridor: EEC). In such situation, it is very

important to address the needs of the economic corridor development, together with the new approach for the government support. Otherwise, although the good ideas and support are available for the economic corridor development, no government budget will be available. Addressing this issue is very important for Thailand as well as for other GMS countries.

Mr. Madhurjya Kumar Dutta, Director, Trade and Investment Facilitation (TIF) Department, MI responded to the above observation made by JICA Thailand and said that the key objective of the research is to obtain insights on what is happening in the SEC and how national governments in CMTV can take these issues and move forward. Nowadays, funding from the donor is reducing and some of the best practices from the Project such as SME cluster development should be incorporated into national SME development policy. It is the role of the national governments in CMTV to take forwards the results and outcomes that have been created by the Project for the further development of SMEs in their countries.

Asian Development Bank (ADB)



It is pleased to see the research recommended to facilitate the use of already established infrastructure system. Initiatives suggested in the research would be to build on the established infrastructure to do something beyond and would not be possible without the infrastructure development in the last 25 years initiated by the ADB. This is an interesting experimentation for GMS countries to initiate successful case in ASEAN.

Also, ADB in addition to financing infrastructure, have also strived to facilitate cross - border transportation and border - crossing points. It is also good to look at more practical constraints in bringing things or services across the borders.

6.3. Mid - Term Review (MTR) of the Project on Enhancing Competitiveness of Small and Medium-sized Enterprises (SMEs) in the Southern Economic Corridor (SEC) of ASEAN Mekong Subregion (AMS)

Mr. Takehiro Iwaki, Director, IC Net Asia



Mr. Iwaki presented the results and findings from the Mid-Term Review (MTR) of the Project on Enhancing Competitiveness of Small and Medium-sized Enterprises (SMEs) in the Southern Economic Corridor (SEC) of ASEAN Mekong Subregion (AMS). In particular, his presentation focused on (i) objectives; (ii) survey tools, coverage and targets; (iii) key findings; (iv) good practices / success stories; (v) contributing and inhibiting

factors; (vi) lessons learned; (vii) recommendations; and (viii) ideas for new project development.

(i) Objectives

The objectives of the Project MTR were to 1) assess the progress of the project against outputs and outcomes, particularly in reference to success indicators and measures; 2) identify issues and recommended solutions, particularly on the possible areas of future project intervention; and 3) examine issues and challenges that may affect effective and efficient implementation and the contribution to the project success.

(ii) Survey Tools, Coverage and Targets

The Project MTR was conducted through document review and field survey for 1) the examination of progress against success measures and success indicators systematically and comprehensively; and 2) extraction of good / practices / success stories to examine how the project inputs have been utilized by the SME clusters.

The Project MTR assessed five main areas which include 1) current situation and progress of project implementation at each site and the state of the progress on action plan; 2) challenges and difficulties for the capacity development activities to achieve project outcomes; 3) progress of business profiles collection in the SEC provinces; 4) requirements for missing actions of the project to complete project objectives; and 5) recommendations / suggestions for future project intervention.

The Project MTR was conducted from July 8 to August 4, 2017 by road in a single trip to have Key Informant Interviews (KII) with 1) local SME clusters; 2) concerned government agencies; and 3) CCI and Business Associations (BAs).

(iii) Key Findings

The MTR provided key findings as follows:

- Cooperation with the project has been widely appreciated by the targeted SME clusters for the development of their business. It is fair to say from the MTR results that targeted SME clusters have been applying gained knowledge / skills / ideas / network for the capacity development of the cluster;
- Each cluster has potential for further development, however **situation of targeted SME clusters is widely varies** depending on the type and operation history of the cluster, type of product and market, degree of economic and industrial development in the country, institutional support, and other factors;
- There are also **difficulties / constraints / challenges in terms of technical, financial, policy** and other aspects for cluster development, particularly in Cambodia and Myanmar;
- Expectations of the SME clusters and government agencies / BAs on the planned outcomes / activities of the project, particularly on SEC Biz Database and investment and trade promotion events are high;
- Established network among the stakeholders in the 19 target provinces and with MI, which is expected to be further strengthened through the planned activities by the end of the Project, is a precious asset in the SEC and contributes to the economic development of the corridor in the long - run;

- It is still too early to measure the impacts of the project, but the outcomes of the project are expected to become the footholds of the dynamic expansion of cross - border trade and integration of SMEs to the regional value chain in the SEC.

(iv) Good Practices / Success Stories



The MTR highlighted various good practices and success stories related to SME cluster development as follow:

- 1) Formation / Strengthening of the Cluster** (e.g., Dawei / Preah Sihanouk / Chanthaburi);
- 2) Enhancement of the Production Capacity** (e.g., Kampong Chhnang / Kanchanaburi);
- 3) Product Development** (e.g., Pursat / Svay Rieng / Tay Ninh);
- 4) Product Certifications / Product Quality** (e.g., Prachinburi / Ratchaburi);
- 5) Development of Market Channels** (e.g., Kampot / Sa - Kaeo / Can Tho);
- 6) Networking among Training Participants** (Koh Kong / Trat);
- 7) Synergy Effects with Other Initiatives** (Banteay Menchey / Pursat);

(v) Contributing and Inhibiting Factors

The MTR discussed contributing factors which include 1) regional training; 2) networking; 3) leadership by the entrepreneurs; and 4) the organizational strength of the cluster. He also discussed inhibiting factors which include 1) fundamental constraints for business development; 2) institutional / organizational capacity; 3) communication / coordination with SME clusters and government agencies / BAs; and 4) SEC Biz Database.

(vi) Lessons Learned

The MTR highlighted various lessons learned as follows:

1) Capacity of SME Cluster

SMEs clusters with sufficient organizational capacity and strong leadership utilize the external supports and network effectively for business development, while the clusters with limited capacity require further supports. Also, some SMEs clusters, particularly those in Cambodia, may need development in product quality and production capacity with technical and other inputs before considering cross - border trades and exports. The challenges / problems that SME clusters face and cross - border trade / export promotion are remained far.

2) Data Collection

From the experience of the baseline survey and collection of profile for SEC Biz Database, information / data to be collected from stakeholders should be concise, simple, and practical to encourage the response of respondents.

3) Role of Country Coordinators

Approach to and communication with government agencies should be followed - up carefully to ensure their involvement as well as share progress. Role of country coordinators is highlighted.

4) Trainings

Multi - national regional trainings organized by the project were effective to establish / strengthen network among stakeholders, which may have long - term impacts for business development and cross - border trade of SME clusters. However, the training should not be very tight or intensive for promoting understanding of participants and for encouraging interaction among participants. Handouts of the training contents should be distributed in advance so that participants can study the contents in advance.

(vii) Recommendations

The MTR put forward recommendations for the better implementation of the Project activities as follows:

1) SME Cluster Development

Some of the targeted SME clusters, particularly in Cambodia and Myanmar, need more practical knowledge and ideas for cluster management, product development, market development and other issues. Observation trip to the producers of related products, including other targeted SME clusters of the project, is considered effective to enlarge their visions for business development. Follow - up and consultation to SME clusters, including one cluster in Vietnam that dropped from the Project, is required to further enhance, as well as to sustain, the project effects.

2) SEC Business Database (www.sec4business.com)

Expectation to SEC Biz Database is high, but the detail of the database, including potential benefits and management, is not well recognized by the stakeholders. It is recommended for the Project to publish the database as early as possible and share its advantages and management methods with the stakeholders, probably through country coordinators. This would result in the utilization of the database as well as more participation from private companies. It is also suggested for the project to modify the database, upon the necessity, within the project period based on the feedbacks from the stakeholders.

3) Project Management

It is recommended for the Project to strengthen the communication with government agencies / BAs to share the progress and to ask supports for activities, including collection of profiles for SEC Biz Database. As mentioned above, it is also considered important to follow - up the situation of SME clusters, which may need information / coordination / consultation from the Project. For the communication / coordination with SME clusters and others concerned, utilization of country coordinators is suggested. The country coordinators can also take a role to share the information of studies / surveys conducted by the Project, such as values chain survey, with stakeholders by the end of the Project. It is also suggested for the Project to review and modify some of success measures and success indicators before the terminal evaluation so that progress / achievement can be monitored / evaluated appropriately. It is also suggested that questionnaires for end - line survey be designed as simple and concise as possible to collect the information efficiently and effectively.

(viii) Ideas for New Project Development



The MTR discussed various ideas for new project development, which include (1) expansion of the project outcomes on SME Clusters Development; (2) linkages of the project outcomes along the SEC; and (3) integration of the project outcomes in ASEAN and the world. Details are as follow:

(1) Expansion of the Project Outcomes on SME Clusters Development

- Support for leading entrepreneurs / Young entrepreneurs (Business Idea Competition and financial support for winners);
- Training for the Capacity Development of SMEs (packaged country specific training).

(2) Linkages of the Project Outcomes Along the SEC

- Development of Sister - Clusters (Coordination / matching support for business cooperation / products development);
- Support for Province - to - Province Cooperation (Particularly between boarder provinces for boarder market and cross - border trade).

(3) Integration of the Project Outcomes in ASEAN and World

- Platform as Business Matching and Innovation (Platform for companies and academics, Creating Shared Value (CSV), E - Commerce, etc)

6.4. Country Reflections

Following the presentation of the results and findings of the Project MTR, PSC members provided important observations, suggestions, recommendations, ideas and views as follows:

Ministry of Commerce (Cambodia)



Regarding SEC Business Database, it should have comprehensive, effective and good structure and flow of information for dissemination and to increase the number of business profiles for business matching. It is also important to have the institution that can help disseminate the information in the database.

Ministry of Industry and Handicraft (Cambodia)



It is understood that the knowledge is created at certain level for each SME clusters. It is very important to share such knowledge. It is required to create the platform for sharing such knowledge, which is sustainable and create great impact.

Ministry of Industry (Myanmar)

In Dawei, two SME clusters are formed and they can start developing business more effectively. In fact, fishermen in Dawei already know how to develop their fishery business further, which they learned from the Meik, the province that already has necessary facilities for fishery sector including Jetty and cold storage. However, what is required for the fisherman in Dawei is the sufficient resource and fund.



Union of Myanmar Federation of Chambers of Commerce & Industry (UMFCCI)

The Project MTR clearly highlighted the challenges and issues clusters in 19 SEC provinces are facing. The UMFCCI bring these points to the Ministry of Commerce and the Ministry of Industry for discussion. The UMFCCI will also discuss with the clusters in Dawei and then would like to propose MI about the additional capacity building activities for their further development.



Federation of Thai Industries (FTI)



Before implementing any Project, we have to look carefully into budget planning and the appropriate way to expand the market and enhance the cooperation and collaboration among clusters from one country to another, then build cluster to cluster. If business profits generated can be shared fairly among two parties, it will enhance more trust and confidence to continue as business. Beside, we also have to look at the continuity of the supply chain and the commitment with the limited resources and finance.

For the development of young entrepreneurs, FTI also has the program to develop the 2nd generation of the key stakeholders (children of the senior government official or entrepreneurs) from the border countries (Cambodia, Laos, Myanmar and Vietnam: CLMV) to enhance the cooperation and collaboration among them.

Board of Trade of Thailand (BOT)



Every project has limited time frame, resource and finance. MI should look at these aspects in the long - term in order to ensure the sustainability of the Project. Also, the corridor development involves positive aspect of the development (e.g., hard infrastructure development). However, there are also negative aspects of such development (e.g., social issues). It is important to consider and address these negatives aspects as well.

For the development of Yong Entrepreneurs, Ministry of Commerce of Thailand has implemented the Young Entrepreneur Network Development Program (YEN-D) program since 2014 which include members from CLMV, which MI may be able to get some ideas.

Finally, it is also important to consider corporate social responsibility (CSR) and obtain increased degree of support and cooperation from the private sector for the project implementation, not only those of Japan but also of other countries including US and the EU. We can create trust among the local stakeholders and beneficiaries through CSR activities.

7. The Way Forward and Closing Remarks

Dr. Watcharas Leelawath, Executive Director, Mekong Institute



Dr. Leelawath expressed MI's appreciation for all the PSC members presented at the Workshop for their active discussion. Dr. Leelawath, by concluding the Workshop, mentioned that the MI will take into account observations, suggestions, recommendations, views and ideas provided by the PSC members to improve activity implementation under the Project and make real impact on the ground. Especially, he stressed the

importance of the sustainability and said that MI will strive to continue to implement the project and provide benefit to the project stakeholders and beneficiaries in the sustainable manner. Finally, Dr. Leelawath requested the PSC members for their continuous support and guidance for the successful implementation of the activities under the Project.

8. Key Outcomes

(i) The Research on Cross - Border Value Chain Bottlenecks in the SEC

The results and findings of the research were discussed and validated by the PSC members. PSC members also understood the cross - border value chain bottlenecks in the SEC, including relevant regulatory issues and the process flows of the regulatory requirements. Finally, the PSC members supported the specific recommendations for the enhancement of cross - border trade for the products selected for the Project and also provided important observations, suggestions, recommendations, views and insights including (1) resource and financial constraint for SME cluster development; and (2) government support for economic corridor development.

(ii) The Project Mid - Term Review (MTR)

The results, findings, recommendations and ideas for the new project development of the Project MTR were shared, discussed and supported by the PSC members. The PSC members provided important observations, suggestions, recommendations, views and ideas, which include dissemination of the SEC database, knowledge management, resource and financial constraint for project implementation as well as sustainability of the Project. Regarding the sustainability, the PSC members opined that for a multi - lateral capacity development project encompassing 19 provinces in 4 countries with varied activities, the two - year project frame is quite short to assess the impact and they unanimously suggested for the continuation of the project activities based on the results achieved so far.

MI will take into account the outcomes of the Dissemination Workshop and the observations, suggestions, recommendations, views and ideas provided by the PSC members to improve activity implementation under the Project, including the preparation for the 2nd phase of the Project.

9. Appendix

9.1. Concept Note

1. Introduction

Funded by the Government of Japan through ASEAN – Japan Integration Fund (JAIF), the Mekong Institute (MI) is implementing a two - year project on “Enhancing Competitiveness of Small and Medium - sized Enterprises (SMEs) in the Southern Economic Corridor (SEC) of ASEAN Mekong Subregion (AMS)” for the period 2016 – 2018. The Project is implemented with the collaborations between MI and its stakeholders in the four countries along the SEC, namely Myanmar, Thailand, Cambodia, and Vietnam (CMTV) at both national and sub-national levels.

(i) The Research on Cross-Border Value Chain Bottlenecks in the SEC

As one of the activities under the project, MI implemented the research on cross - border value chains bottlenecks in the SEC in CMTV. The research aimed at mapping of the sectoral and geographical trade flows of the 19 SME cluster products in the SEC and identifying bottlenecks of the trades of the products and exploring policy changes to promote cross border trade in the SEC of the ASEAN Mekong Subregion (AMS). In particular, the research (i) assessed the regional market demand, opportunities and constraints in the CMTV for the 19 products selected for the project; (ii) assessed the cross - border value chain bottlenecks; (iii) assessed the regulatory environment for the trade of the specific products; and (iv) identified grounds for policy changes for increasing cross-border trade.

MI trade and Investment Facilitation (TIF) Department, together with the external consultant, implemented the research through (i) review of secondary data, including project related documents, legal and technical documents related to private development in the SEC in CMTV and other relevant documents; (ii) meetings with the project direct beneficiaries and stakeholders in the border provinces along the SEC in CMTV. The research team conducted field survey on March 14 - 23, 2017 in nine border provinces in the SEC in CMTV, namely Tanintharyi Region / Dawei, Kanchanaburi, Sa - Kaeo, Banteay Meanchey, Svay Rieng, Kampot, Koh Kong and Tay Ninh provinces. The team came up with the research report on November 2017.

(ii) The Project Mid - Term Review (MTR)

As the project has passed half way through its duration, MI conducted the project mid-term review (MTR) during July - August 2017. The MTR reviewed the project situation and progress of the project against the stated outputs and outcomes, monitored the implementation to improve the project results towards sustainability, and identified issues and recommended inputs for new project development. The MTR also addressed the issues and challenges, and provided supportive recommendations to the project based on the project activities implemented during February 2016 – June 2017. The study team

conducted field visits in 19 project provinces in the SEC in CMTV on July 9 – August 4, 2017. The fieldwork collected the data for MTR through a series of focus group discussion (FGD) and key Informant Interview (KII) with project stakeholders including CCIs, BAs, provincial trade and industry - related departments and SME product clusters from 19 SEC Provinces in CMTV. The MTR report was completed and submitted to JAIF Management Team (JMT) in ASEAN Secretariat in October 2017.

(iii) Dissemination Workshop

As an integral part of the Project, MI organizes a Dissemination Workshop to share results of the (i) research on cross-border value chain bottlenecks in the SEC; and (ii) mid-term (MTR) of the Project on “Enhancing Competitiveness of SMEs in the Southern Economic Corridor (SEC) of ASEAN Mekong Subregion (AMS)” with the members of Project Steering Committee (PSC). The Dissemination Workshop is scheduled on November 13, 2017 at Pullman Grand Sukumwit, Bangkok, Thailand.

2. Objectives and Expected Outputs

The objectives and expected outputs of the Dissemination Workshop are to:

(i) The Research on Cross - Border Value Chain Bottlenecks in the SEC

- Share and validate the research results with the members of Project Steering Committee (PSC) emphasizing on:
 - opportunities and constraints in the CMTV for the products selected for the project;
 - cross-border value chain constraints including relevant regulatory constraints and the process flows of the regulatory requirements;
 - Specific recommendations for the enhancement of cross - border trade for the products selected for the project. These recommendations are expected to be input for necessary policy changes to ease cross - border trade.

(ii) The Project Mid - Term Review (MTR)

- Share the project implementation status as of June 2017;
- Share the findings and recommendations from the Project MTR;
- Share lessons learned and experiences gained and provide inputs for the further implementation of the Project including the Phase 2.

3. Expected Outcomes

(i) The Research on Cross - Border Value Chain Bottlenecks in the SEC

- The research results discussed and agreed by the PSC;

- The PSC members acknowledge the identified opportunities and constraints in the CMTV for the products selected for the project;
- The PSC members gains understanding of the cross - border value chain constraints including relevant regulatory issues and the process flows of the regulatory requirements;
- The PSC members agree with the specific recommendations for the enhancement of cross - border trade for the products selected for the project.

(ii) The Project Mid - Term Review (MTR)

- Project implementation status (achievements, challenges and lessons learned) as of June 2017 are reviewed, discussed and examined by the PSC members;
- Findings and recommendations of the Project MTR are discussed and agreed by the PSC members;
- Suggestions and recommendations for the further implementation of the Project, including the Phase 2, are provided by the PSC members.

4. Target Participants

The members of Project Steering Committee (PSC) from regional organization, Japan and Cambodia, Myanmar, Thailand and Vietnam (CMTV) are invited to participate in the Dissemination Workshop.

Table 1: Project Steering Committee (PSC) Members

No	Name	Position	Organization
Regional			
1	Mr. Hideaki Iwasaki	Country Director	Asian Development Bank (ADB) Thailand Resident Mission
Japan			
2	Mr. Hiroki Mitsumata	President	Japan External Trade Organization (JETRO) Bangkok
3	Mr. Katsuya Miyoshi	Representative	Japan International Cooperation Agency (JICA) Thailand
Cambodia			
4	Mr. Virak Chin	Chief, Self-Employment Generation Fund Office, Department of Training, Directorate General of Technical Vocational Education	Ministry of Labor and Vocational Training

No	Name	Position	Organization
		and Training	
5	Mr. Vichea Suon	Director, Trade Training and Research Institute (TTRI)	Ministry of Commerce
6	Mr. Bunna Yea	Deputy Director General, General Department of SMEs and Handicraft	Ministry of Industry and Handicrafts
Myanmar			
7	Mr. Soe Moe kyaw	Deputy Director General, Directorate of Industrial Supervision and Inspection	Ministry of Industry
8	Mr. Nay San	Deputy Director, Research Development & Technology Extension Department, Department of Trade Promotion	Ministry of Commerce
9	Mr. Aung Kyi Soe	Secretary General	Federation of Chambers of Commerce & Industry (UMFCCI)
Thailand			
10	Mr. Athiwat Pattanachaipuvanon	Member, Border Trade Committee	Federation of Thai Industries (FTI)
11	Mr. Apisit Cholsakorn	Director	Board of Trade Thailand
Vietnam			
12	Ms. Le Hoang Oanh	Director General, Asia - Pacific Market Department	Ministry of Industry and Trade
13	Dr. Pham Thi Thu Hằng	Secretary General	Chamber of Commerce and Industry (VCCI)

5. Venue

The Dissemination Workshop is organized at Pullman Grand Skhumvit, Bangkok, Thailand.

6. Organizing Team

Mr. Madhurjya Kumar Dutta

Director, Trade and Investment Facilitation (TIF) Department, Mekong Institute (MI)

Mr. Sa-nga Sattanun

Program Manager, Trade and Investment (TIF) Department, Mekong Institute (MI)

Mr. Toru Hisada

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9.2. Program Schedule

November 13, 2017 (Monday)	
Venue: Meeting Room 6 (5 th Floor), Pullman Grand Sukumwit, Bangkok, Thailand	
13:50 – 14:00	Registration - Mr. Toru Hisada, Senior Project Coordinator, Trade and Investment Facilitation (TIF) Department, Mekong Institute (MI)
14:00 - 14:10	Opening Remarks - Dr. Watcharas Leelawath, Executive Director, Mekong Institute (MI)
14:10 - 14:20	Workshop Objectives - Mr. Madhurjya Kumar Dutta, Director, Trade and Investment Facilitation (TIF) Department, Mekong Institute (MI)
14:20 - 14:30	Group Photo
14:30 - 15:00	The Result of the Research on Cross-Border Value Chain Bottlenecks in the SEC - Mr. Daisuke Matsushima, Professor, Nagasaki University
15:00 – 15:20	Country Reflections - Cambodia - Myanmar - Thailand - Vietnam
15:20 – 15:30	Coffee Break
15:30 – 16:00	The Result of the Project Mid-Term Review (MTR) of the Project on “Enhancing Competitiveness of SMEs in the Southern Economic

	Corridor (SEC) of ASEAN Mekong Subregion (AMS)” - Mr. Takehiro Iwaki, Director, IC Net Asia
16:00 - 16:20	Country Reflections - Cambodia - Myanmar - Thailand - Vietnam
16:20 – 16:30	Closing Remarks Dr. Watcharas Leelawath, Executive Director, Mekong Institute (MI)

9.3. Delegates Directory

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The Greater Mekong Subregion

The Greater Mekong Subregion (GMS) comprises five Southeast Asian countries and two provinces of China sharing the Mekong River, namely Cambodia, Lao PDR, Myanmar, Thailand, Vietnam, and Yunnan Province and Guangxi Autonomous Region of the People's Republic of China.

About Mekong Institute

Mekong Institute (MI) is a GMS intergovernmental organization (IGO) working closely with the governments of six countries to promote regional development and cooperation through capacity building programs and projects in three thematic areas of agricultural development and commercialization, trade and investment facilitation, and innovation and technological connectivity.



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