SECTOR ASSESSMENT (SUMMARY): EDUCATION

Sector Road Map

1. Sector Performance, Problems, and Opportunities

1. The Government of Myanmar has stepped up efforts to strengthen the education sector, recognizing that an educated population and workforce are a prerequisite for economic growth and poverty reduction. The Comprehensive Education Sector Review (CESR)—the first rigorous sector assessment in 2 decades, launched by the Ministry of Education (MOE) in 2012 in cooperation with other ministries, the Asian Development Bank (ADB), and other development partner organizations (DPOs)—has elucidated progress as well as gaps. For primary education, the net enrollment rate (NER) reached 87.6% in school year (SY) 2009/10, based on the latest Integrated Household Living Conditions Survey (IHLCS). However, progress in post-primary education has lagged, with NERs of only 52.2% for secondary education and 10.7% for higher education, and roughly 1.7% of 16–19 year-olds enrolled in technical and vocational education and training (TVET). The majority of young people (including 69% of girls and 67% of boys from poor households) fail to complete even lower secondary education (LSE), often viewed as a minimum prerequisite to access formal and modern sector employment and participate in opportunities brought by growth. Gaps in post-primary education access, quality, and subsector management also undermine Myanmar’s competitiveness. Bolstering post-primary education will thus be vital to promote inclusive growth and poverty reduction, including by preparing the young for the workforce, providing a knowledge and skills base to meet rapidly evolving demands, and equipping the economy to enter higher-value-adding sectors in global markets.

1.1 Gaps in Equitable Access

2. Secondary education. With progress toward universal primary education, secondary education poses a binding constraint on education access. ADB-supported CESR analysis indicates that, due to low transition rates from primary school to LSE and a high dropout rate within LSE grades, only 40%–48% of children in recent cohorts completed LSE. Of the roughly 1.1 million new primary school entrants each year, only roughly 300,000 reach the end of upper secondary education (USE) 11 years later, of which only one-third (roughly 110,000) pass the matriculation exam. Given that most forms of TVET and higher education require completion of USE, the remaining “missing million” is left without access to many forms of employment, further

---

1 This summary draws on (i) ADB. 2014. Updated Assessment of Myanmar Post-Primary Education. Manila. Available on request; (ii) ADB-supported CESR (Phase 1) technical annexes (www.adb.org/projects/46369-001/documents and www.cesrmm.org); and (iii) forthcoming CESR (Phase 2) technical annexes, to be released in late 2014.
2 Project Technical Unit. 2011. Integrated Household Living Conditions Survey (IHLCS) in Myanmar: Poverty Profile (2009–10). Yangon. IHLCS is the most recent national survey data available. The Myanmar school year starts in June and ends in March. ADB support to the CESR included analysis of data from the Ministry of Education (MOE), IHLCS, and an ADB-supported survey of secondary education schools distributed nationwide.
3 TVET estimates based on SY2009/10 IHLCS data for “other training”, excluding higher education programs.
5 In a 2014 survey, employers cited ill-prepared human resources—including a lack of mastery of foundational knowledge and hard and soft skills (e.g., numerical skills, communication, critical thinking, and teamwork)—as the second most serious barrier to business. See http://www.unescap.org/sites/default/files/MBS_Survey_Results.pdf . Similar results are reported at www3.weforum.org/docs/WEF_GlobalCompetitivenessReport_2013-14.pdf .
6 Myanmar is expected to join the Association of Southeast Asian Nations (ASEAN) Economic Community in 2015.
7 MOE and IHLCS data suggest that, while 80%–83% of children in recent cohorts have finished primary schooling, nearly 1 in 4 primary graduates never enters middle school, despite some signs of progress.
8 According to MOE data, enrollment in LSE (grades 6–9) grew at an annual average rate of 2.4% during SY2005/06–SY2012/13, but USE (grades 10–11) enrolment rose by only 0.3% annually in that period.
education, or training. Geographic and socioeconomic gaps widen markedly starting in LSE. Despite strong gender parity overall, girls from poor families, remote rural areas, and some ethnic groups face particular challenges. ADB-supported detailed enrollment profile (DEP) analysis shows that, for poor children, dropout accelerates after age 11 and is linked with repetition and lagged progress by age, suggesting that education quality and learning outcomes are most problematic for the poor. Many of the factors that depress access mirror those in neighboring countries. However, poor quality is also integrally linked to weak access in Myanmar, reflected in high matriculation exam failure rates and costs of private tutoring, and the fact that “lack of interest” is the lead self-reported reason for dropout during LSE and USE.

3. Vocational and higher education. Low secondary education completion rates pose the most binding constraint on access to TVET and higher education. While the Ministry of Science and Technology (MOST; the lead agency for TVET) has begun to reintroduce government technical high schools, publicly provided TVET largely focuses on multiyear programs for USE graduates. This arguably is a lose-lose situation: the large majority of young people are unable to pursue TVET, while nearly all USE graduates choose to enter higher education. Despite some expansion, private training remains limited and concentrated in cities and niche skill areas like computer and language training. Only roughly 1.7% of 16–19 year-olds enrolled in any form of training in SY2009/10 (one-sixth of the 10.7% share enrolled in higher education), with half of those being higher education students also attending private training. There is a particular dearth of access to TVET for foundational skills needed by sectors such as industry, construction, and agriculture. The CESR thus called for urgent development of competency-based modular short courses (CBMScs) and other programs in these skill areas for students unable to complete USE and workers trapped in unskilled, often informal, and part-time labor. Higher education has expanded, following disruptions in the late 1980s. Even among the poor, flow-through from secondary education is a greater constraint than costs. DEP analysis confirms that much larger shares of students from urban and affluent households reach and complete grade 11. Expanding access to higher education for the sake of it is thus arguably a lower priority than improving higher education quality and management (paras. 5–6) and secondary education access and learning outcomes, to bolster the pool of potential higher education entrants.

1.2. Gaps in Quality and Relevance


---

9 Many students attend cramming schools and repeat the exam later on. IHLCs data imply that up to 25% of total students eventually pass, but this may be overstated. It also appears that repeat-passers have fewer opportunities.

10 Comparing rural with urban children, the gap in primary completion rates is just above 13 percentage points (80% versus 94%), but the gap widens to nearly 40 percentage points (78% versus 39%) for LSE completion.

11 Fewer poor girls transition from primary school to LSE, and only 45% of girls and 53% of boys in poor households enter LSE. Conditional on reaching LSE, dropout rates within secondary education are highest among poor boys.

12 By age 15 (the normative age for grade 11), 65% of girls in poor households are out of school, while half of those in school are still in LSE or primary grades.

13 These include (i) disparities in completion rates and academic preparedness from primary schooling; (ii) demand-side factors such as poverty, financial and opportunity costs, language and other cultural factors, and disabilities; and (iii) supply-side factors such as gaps in school networks in remote areas and inadequate financial and human resources.

14 In terms of household expenditures on education, USE (not higher education or TVET) imposes the highest cost burden per student, while private tutoring (driven by rote-based learning and exams) is the largest component.

15 For example, in late 2009, 2.4% of 16–19 year-old women in urban areas were enrolled in language courses and 5.7% of them in computer courses, with at most 0.1% enrolled in training for primary sectors, industry, or crafts.

16 The estimated NER for higher education was 10.7% (using the normative 16–19 age range) in SY2009/10.

17 Similar dynamics also chiefly explain the gender ratio of roughly 1.5 female per 1 male student in higher education.

18 High matriculation exam failure rates (para. 2) and repetition rates in grades 9–11 point to weak subject mastery. An ADB-supported survey also showed that teaching of upper secondary math and sciences in English inhibits learning.
Quality appears weakest in poorer areas, compounding inequities in access. Employers often complain that secondary school leavers—the majority of workforce entrants—are “untrainable” because they lack a flexible foundation of knowledge and competencies such as critical thinking, problem solving, and other soft skills (see also footnote 5).

5. **Vocational and higher education.** It is important to improve (i) the alignment between TVET and secondary and higher education; (ii) the relevance of curricula, methods, and program design to evolving demands, by shifting to competency-based approaches and building links to employers; (iii) quality control and accreditation, particularly as institutions and programs proliferate; and (iv) faculty qualifications and professional support systems. A framework for private TVET and higher education provision is still under development. For TVET, priorities include formulating (or revising) skills standards and qualification frameworks consistent with international norms and the local context, and building faculty and institutional capacities to deliver demand-driven, competency-based programs. Challenges specific to higher education include those related to balancing quality assurance with increased autonomy, overhauling the current matriculation exam and student assessment, and building applied research capacity.

1.3. **Gaps in Education Sector Management**

6. Resourcing remains a key challenge, but government education budgets have begun to rise rapidly. The CESR identifies gaps in sector management that exacerbate access and quality issues. In addition to sector-wide challenges—including the breadth of the reform agenda, decentralization, and institutional capacity—post-primary education faces challenges related to (i) coordination between multiple ministries and institutions providing this education; (ii) the need to align with labor market demands; (iii) human resources and technical and managerial capacity (as well as facilities); (iv) systems for quality control and student and teacher assessments; (iv) institution-level autonomy; and (v) lack of or weak policies for mobilizing the private sector.

2. **Government’s Sector Strategy**

7. **Policies and plans.** Alongside budget increases, the government has adopted an evidence-based approach to policy and planning via the CESR. Under phase 3 (for completion in early 2015), MOE, MOST, and other agencies are formulating a prioritized and sequenced National Education Sector Plan (NESP), as a unified umbrella for government and DPO investments. NESP’s FY2015 sub-plan focuses on “quick win” programs, with ADB supporting programs linked to (i) approval of the new basic education curriculum framework and formulation of new primary and secondary education curricula; (ii) piloting and initial scale-up of CBMSCs; and (iii) reforms of the university entrance system. Early drafts of NESP’s 5-year sub-plan (the education component of the national 5-year plan) have identified priorities including the rollout of the new kindergarten–grade 12 curricula and coupled pedagogy and assessment reforms, and the expansion of CBMScs and other TVET programs targeting basic skills. Broader ongoing

---

19 DEP analysis shows that grade repetition is most serious among the poor, pointing to weak learning.
20 The Private School Registration Law took effect in SY2012/13, but covers only grades 1–11.
21 This will require building the capacities of TVET agencies and providers, and the National Skills Standard Authority.
22 The education budget more than tripled between fiscal year (FY) 2011 and FY2013 alone, reaching 14.1% of the total budget and 2.1% of gross domestic product. [http://www.worldbank.org/projects/P146332?lang=en](http://www.worldbank.org/projects/P146332?lang=en). Myanmar’s fiscal year begins on 1 April of the stated calendar year and ends on 31 March of the next calendar year.
23 Depending on how TVET and higher education are defined, at least 12 agencies offer TVET and/or higher education programs. Currently 9 types of schools (including monastic and private schools) provide secondary education.
24 Prior to the CESR, broad strategic directions were laid out in the 30-Year Long-Term Education Development Plan (2001–2030), associated 5-year plans, and the Ten-Point Education Policy issued by the President in 2011.
25 In partnership with Australia, ADB is supporting formulation of the new secondary education curriculum, in close coordination with support by Japan International Cooperation Agency for primary education reforms (paras. 9–10).
reforms include the drafting or revision of the National Education Law and subsector legislation, decentralization, and provision of autonomy to TVET and higher education institutions.

8. **Risks and risk management.** Risks include those related to (i) government leadership and multi-stakeholder coordination; (ii) the breadth of reform and investment needs; and (iii) institutional capacities. However, the education sector has stood out as a leading example of inter-agency coordination, government leadership, and harmonized DPO support via the CESR and Joint Education Sector Working Group. In addition to supporting prioritization and sequencing of NESP investments, the CESR has helped identify institutional gaps, and DPOs are providing and preparing related capacity development support.\(^{26}\)

3. **ADB Sector Experience and Assistance Program**

9. **Ongoing assistance.** Since 2012, ADB has been the lead DPO supporting post-primary education, complementing other DPOs’ support, which is concentrated in primary, pre-primary, and nonformal education.\(^{27}\) ADB’s first two technical assistance (TA) projects have played a key role in CESR sector analytics and policy dialogue.\(^{28}\) These TAs have or are supporting (i) MOE in developing and launching a secondary education curriculum reform strategy (para. 10);\(^{29}\) (ii) MOE, MOST, and other agencies in formulating the NESP; and (iii) MOST and the TVET Task Force in formulating a TVET law and related policy. A third TA is supporting MOST and the Ministry of Industry in developing and pilot testing CBMSCs (para. 7) as a new model to open TVET access to the poor and overcome the lack of workers with foundational skills.\(^{30}\)

10. **Support through 2016.** As part of the interim country partnership’s first pillar, ADB will support the government in formulating post-primary-education-related elements of the NESP’s 5-year sub-plan, with a focus on investments to implement TA-supported secondary education and TVET reforms.\(^{31}\) In particular, ADB and potential cofinanciers will consolidate support to LSE, USE, and TVET reforms via the 2015 Preparing Youth for the Workplace Program.\(^{32}\) Support to MOE and MOST under the umbrella of this program would (i) help strengthen sector management,\(^{33}\) (ii) allow for a cohesive approach to tackle the access problems of the “missing million” (para. 2), and (iii) ensure a comprehensive and consistent approach to secondary education and TVET quality and relevance.\(^{34}\) The program would be complemented by TA on reforms and rationalization of post-primary education in Myanmar, slated to start in early 2015.\(^{35}\)

---

\(^{26}\) Despite a range of capacity gaps, existing capacities are strong in some respects: e.g., the World Bank’s Public Expenditure Review found the education sector’s financial accounting systems to be robust, albeit paper-based.

\(^{27}\) ADB has been involved in the CESR process from its earliest conceptualization in February 2012. ADB support taps its regional experience in supporting post-primary education in countries with similar contexts and reform agendas.

\(^{28}\) These TAs are: (i) ADB. 2012. *Technical Assistance to the Republic of the Union of Myanmar for Support for Education Sector Planning*. Manila (TA 8187-MYA); and (ii) ADB. 2013. *Technical Assistance to the Republic of the Union of Myanmar for Support for Post-Primary Education Development*. Manila (TA 8385-MYA). See also footnote 1.

\(^{29}\) These reforms will overhaul the secondary education curriculum to better prepare the young for Myanmar’s evolving socioeconomic context, and will culminate in the extension of high school through grade 12 in SY2020/21.


\(^{31}\) The first pillar (human resources and institutional capacities) identifies ADB support to post-primary education analysis, capacity development, and policy dialogue under the CESR, as well as preparation of priority investments.

\(^{32}\) The proposed sector development program directly supports the first pillar of ADB’s strategic priorities for 2014–2020 (poverty reduction and inclusive growth), which targets expanding education to 6%–10% of ADB operations.

\(^{33}\) This includes promoting policy frameworks and reform strategies for LSE, USE, and TVET, ensuring that they are mutually aligned, linked by stronger learning pathways, and meet new and evolving labor force needs.

\(^{34}\) This will include identifying competencies by engaging employers to formulate demands, and ensuring that reformed secondary education and TVET curricula collectively meet the demands of the labor market.

\(^{35}\) The program will include gender analysis and related interventions, ranging from ensuring gender sensitivity in the new LSE and USE curricula to provision of TVET programs to promote women’s entry into nontraditional fields.
PROBLEM TREE FOR EDUCATION

Effects

- Substantial population segments (especially marginalized groups and those in rural and disadvantaged areas) face constrained opportunities and persistent poverty traps
- Human capital accumulation, broader social development, and national rebuilding decelerated
- Graduates ill-prepared for subsequent education, training, and work (i.e., low external efficiency)
- Narrow, constrained, and less inclusive growth; slow and imbalanced economic modernization; compromised prospects for reentry into global markets and entry into ASEAN Economic Community
- Sector reforms blocked and projected increases in education sector resources undermined

Core Problem

Persistent gaps in access, quality and relevance, and system efficiency in post-primary education

Root causes

Household-level access constraints:
(i) Financial and opportunity costs
(ii) Weak or lacking financial support for poorer students
(iii) Language and cultural gaps
(iv) Gender norms (for some groups and poorer rural areas)
(v) Longer-term impacts of malnutrition

Other access issues:
(i) Limited, pro-urban distribution of schools or institutions
(ii) Lack of dormitories
(iii) Growing ranks of primary graduates strain SES and HES facilities and absorption capacity
(iv) Low quality and relevance and poor conditions deter enrollment
(v) Access gaps for the disabled
(vi) Dropouts and poor learning in prior grades; lack of articulation across levels; matriculation exam failure rates

Curriculum and delivery gaps:
(i) Curriculum needs comprehensive review and overhaul
(ii) Limited upstream and downstream links (primary to SES; SES and PSE to continued learning and on-the-job training)
(iii) Weak or lacking competency-based curricula in PSE, and low relevance
(iv) Lack of school or institution autonomy to tailor curriculum to local needs
(v) Issues in language of instruction (especially for math and science in SES and HES)
(vi) Lack of effective remedial support

Gaps in teaching:
(i) Shortages of qualified rural teachers and PSE faculty; broader human resource gaps and mismatches
(ii) Weak pre- and in-service training, support, and assessment mechanisms
(iii) Further pedagogical support needed to move from rote-based instruction
(iv) Issues related to private tuition
(v) TVET staff lack practical experience; weak entrepreneurial and multi-skill aspects

Poor facilities and learning resources:
(i) Overcrowded classrooms (especially SES)
(ii) Poor quality and insufficient quantity of textbooks and learning materials
(iii) Inadequate or obsolete labs, libraries, machines, etc.
(iv) Ad hoc approach to traditional and modern tools (e.g., distance education) poses quality, efficiency, and equity issues

Weak information and quality control systems:
(i) Lacking or inconsistent data and institutional gaps and rigidities further strained to meet upcoming reforms
(ii) Lack of job counseling, tracer studies, etc.
(iii) Quality control policies and mechanisms lacking or weak

Resource and subsector management gaps:
(i) Systems (e.g., 11 years of basic education) not aligned with international norms
(ii) Inadequate financing
(iii) Institutional gaps and rigidities further strained to meet upcoming reforms
(iv) Weak horizontal and vertical coordination
(v) Lack of clear policy on decentralization and approaches to school and/or institution management
(vi) Human resource and capacity gaps throughout system
(vii) Weak evidence-based planning, MIS, and data
(viii) Private sector role lacking or weak; regulation under development
(ix) Effective and equitable TVET and HES cost recovery needed

ASEAN = Association of Southeast Asian Nations, HES = higher education subsector, MIS = management information systems, SES = secondary education subsector, TVET = technical and vocational education and training.
### Sector Results Framework (Education, 2012–2016)

<table>
<thead>
<tr>
<th>Country Sector Outcomes</th>
<th>Indicators with ADB Contribution</th>
<th>Country Sector Outputs</th>
<th>Indicators with Incremental Targets</th>
<th>Planned and Ongoing ADB Interventions</th>
<th>Main Outputs Expected from ADB Interventions</th>
</tr>
</thead>
</table>
| Teaching and learning improved within a strengthened national education system | Teaching and learning improved within a strengthened national education system  
1.5 million children complete newly introduced kindergarten in SY2015/16  
High school graduates (based on completion exam passage) increase from 107,910 in 2012 to 125,000 in 2016  
5,000 disadvantaged out-of-school youth trained via newly launched CBMSCs | Comprehensive and in-depth knowledge base (including disaggregation by gender and other dimensions) for education sector development  
Foundational legislative and policy reforms completed, incorporating CESR evidence and policy dialogue  
Higher-quality and more relevant curriculum developed for SES  
New CBMSC programs introduced  
NESP provides a unified framework for sector rationalization and prioritized and sequenced sector investments by the government and development partners | Building on CESR Phase Volume 1 (rapid assessment), Phase 2 (in-depth analysis) results compiled and endorsed by October 2014, representing first comprehensive sector analysis since 1992  
New National Education Law, Basic Education Law, and TVET Law approved by 2015; TVET Council established by 2016  
Basic Education Curriculum Framework, SES curriculum, and reform plan for SES curriculum approved by 2016  
Curriculum developed, 300 faculty staff trained, CBMSCs launched, and at least one round completed by April 2015 | (i) Key activity areas:  
CESR inputs and other analytical and policy support for evidence-based reforms (30% of funds disbursed during ICPS)  
Support to SES and TVET curriculum reforms (50% of funds), including launch of new TVET modalities  
Capacity development (10% of funds)  
Civil works, equipment, and materials (10% of funds)  
(ii) Pipeline projects with estimated amounts:  
2015 Preparing Youth for the Workforce Program ($20.0 million ADF loan and indicative $32.0 million grant cofinancing)  
2015 TA on Rationalization of Post-Primary Education ($1.0 million)  
(iii) Ongoing TA projects:  
Support for Education Sector Planning ($570,000)  
Support for PPE Development ($1.5 million)  
Skills Development for Inclusive Growth ($2.0 million) | 9 reports analyzing PPE subsectors completed and incorporated as technical annexes to CESR Phase 1–2 reports, each with gender-related analysis and recommendations  
TVET Green Paper, TVET Law, and SES curriculum framework and reform plan (incorporating ADB inputs) approved  
New CBMSCs pilot tested (training at least 1,000 disadvantaged youth and young adults) and scale-up investments included in NESP  
At least 150 government staff trained, with preference given to qualified women (at least 50 women trained)  
Preliminary scoping of priority PPE investments incorporated in NESP  
2015 Preparing Youth for the Workforce Program approved and launched |

**ADB = Asian Development Bank, ADF = Asian Development Fund, CBMSC = competency-based modular short courses, CESR = Comprehensive Education Sector Review, FY = fiscal year, HES = higher education subsector, ICPS = interim country partnership strategy, NESP = National Education Sector Plan, PPE = post-primary education, SES = secondary education subsector, TA = technical assistance, TVET = technical and vocational education and training.**

As a key step forward from prior education sector strategy documents, Myanmar is formulating concrete objectives with clear quantitative targets at sector and subsector levels, which are expected to be introduced in the FY2016–FY2020 sub-plan NESP. The outcome and targets herein are thus interim statements.