Assessing State Fragility in Myanmar Ahead of the 2020 Election

INAF 5499: Policy Paper

December 11, 2019

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Executive Summary

Myanmar is stuck in an authority-legitimacy feedback loop that has been reinforced by a rentier regime. Following the historical election in 2015 that was widely acclaimed to be free and fair, Myanmar remains a hybrid regime with horizontal inequalities along ethnic and religious lines. Bamar Buddhism and military power continues to dominate economic, political, cultural and social spheres across the country. This report provides the political party, the National League for Democracy (NLD), with an analysis of the key drivers of fragility in Myanmar. The analysis focuses on trends and events relevant to the context for the next 10 months (December 2019 to October 2020), ahead of the 2020 election. Three policy options are provided to the NLD to mitigate and target the country's fragility: develop a policy on economic diversification, diversify party membership, and create a working document for the ongoing peace process.

Methods

This policy brief employed both quantitative and qualitative methods to extract the most relevant, up-to-date, and verified information. Quantitative data included indicators from, but was not limited to, the World Bank, the Heritage Foundation, Yale University, Freedom House, and UN data. We drew on available data from the last ten years allowing for a trend analysis in determining areas where Myanmar is stable, improving, or destabilizing. Qualitative data included information from news articles, peer-reviewed journals, institutional reports, and expert analysis. All of these sources provided information on both Myanmar and what constitutes fragility, allowing us to analyze the six clusters from Carleton University's Country Indicators for Foreign Policy (CIFP): governance, security and crime, economic development, human development, environment, and demography and population. Through our analysis, we determined that governance, security and crime, and economic development are primary drivers of Myanmar's fragility, and human development, environment, and demography and population are secondary drivers. We then used CIFP's Authority, Legitimacy, and Capacity (ALC) model to determine Myanmar lacks adequate authority and legitimacy which has contributed to its fragility. This then fed into three possible scenarios for Myanmar in the next 10 months. Based on our analysis, we developed three policy recommendations with the aim of achieving the best-case scenario and avoiding the worst-case scenario.

Background and Timeline for Fragility

The Republic Union of Myanmar is a country rich in natural resources and ethnic diversity. The country has long been marked by ethno-religious tensions. Following its independence from Britain in 1948, Myanmar had a parliamentary democracy for 14 years.[1] However, significant political, ethnic and territorial tensions resulted in a destabilized government. In 1962, General U Ne Win led a military coup to restore order and consolidate authority. The military junta imposed Bamar Buddhism majority, in an attempt to unify a multiethnic nation to form a unitary state.[2] General Ne Win instituted a new constitution in 1974 and pursued Soviet style nationalization,[3] with isolationist policies and socialist economic programs to nationalize the country's major enterprises.[4] Economic deterioration in Myanmar led to pro-democracy protests in 1988 which were ultimately crushed by security forces.[5] Another bout of widespread protests occurred in 2007 (Saffron Revolution) due to the removal of fuel subsidies and the subsequent price increase. The military regime's legitimacy deteriorated further following their blockade of international aid after Cyclone Nargis in 2008. However, new signs of democratization emerged with a new constitution. Myanmar began its democratic transition with political liberalization in 2011 following the 2010

election that was used to transfer power from the military nominally to a civilian government.[6] Despite the political, economic and social reforms instituted under President Thein Sein, ethnic tension and violence remained high. In November 2015, the National League for Democracy won a landslide victory in the first multi-party nationwide election and established Aung San Suu Kyi as the de facto leader of Myanmar. This was considered a momentous step forward in Myanmar's democratization process. However, there has been continued military influence, weak political representation, and restrictions on the rights to freedom of expression and assembly.[7] The lack of effort towards ethnic cohesion culminated in the persecution and mass displacement of Rohingyas from Rakhine state, creating a humanitarian crisis. Myanmar remains a hybrid-rentier regime with horizontal inequalities. The 2020 election will be an opportunity to assess the direction the country is moving in.

End User

This policy brief and the corresponding policy options are directed at the National League for Democracy (NLD). Formed in 1988 following the pro-democracy protests,[8] the NLD has evolved into a democratic liberal party. During the 2015 election, the NLD relied on promises of national reconciliation, democracy and prosperity[9] as the main tenets of their political platform. The party supported ideas such as non-violent political transition, advocacy for the full observance of human rights, rule of law and transparency.[10] As one of the main political parties in Myanmar, and likely the winner in the 2020 election, the NLD is in a position to enact and champion policy options within the legislature that will address state fragility. While the military initiated the transition to a democratic regime, Myanmar requires a stakeholder that possesses the ability and desire to address the core drivers of fragility, to continue this internally driven path towards democratization.

Stakeholders

See Annex 2 for more detailed information on the relevant stakeholders in Myanmar.

Primary Stakeholders

Tatmadaw (military) has a long history of holding power in Myanmar and is mostly composed of Bamar Buddhists. The military remains the foremost economic and political force in the country – the autonomy of the state has been circumscribed by the economic and political influence of the Tatmadaw. The military's political positions of power are enshrined and institutionalized in the 2008 Constitution.[11] Therefore, democratic control over the military is weak and the state has limited autonomy from the Tatmadaw.[12] The military has relied on resource revenues, ceasefire capitalism and strategic violence to finance the institution, bankroll leaders and sustain local militias.[13] **Min Aung Hlaing** has been the Commander-in-Chief since 2011.

There are approximately **135 recognized ethnic groups** and **five main religious groups** in Myanmar.[14] There is a substantial binary cleavage between the dominant ethno-religious group, the **Buddhist Bamars**, and the numerous minority ethnic and religious groups.[15] Social strife of a religious nature has also been prominent in Myanmar, especially since political liberalization in 2011. There has been an upsurge in Buddhist nationalism, anti-Muslim hate speech that has proliferated online,[16] and communal violence.[17] This is exhibited by the genocide and mass displacement of the **Rohingyas**.

Ethnic armed organizations (EAOs) have existed in Myanmar since the 1950s, due to their political exclusion in the creation of the Union of Burma.[18] Ethnic conflicts are deeply rooted in the political grievances surrounding how the state was formed, power sharing, and ethnic capacity.[19] EAOs have been fighting for more autonomy or secession from the central government.[20] Furthermore, many ethnic groups agree that only political negotiation on self-determination, federalism and ethnic equality can resolve the ethnic conflicts.[21] Due to lengthy conflicts and the occupation of large areas, some EAOs have evolved and created their own economic and political arrangements and networks.[22] Some EAOs have thus attempted to meet the needs of ethnic communities and consolidate their territorial control by being involved in a range of governance functions.[23] Refer to Annex 3 for a list of EAOs in Myanmar and Annex 7 for a network map.

The Hluttaw (Parliament) in Myanmar is made up of the House of Nationalities (Upper House), which comprises of 224 seats, and the House of Representatives (Lower House), which comprises of 440 seats. Twenty-five percent of these seats must be reserved for the military.[24] The NLD is the current party in power, with 390 seats in the Hluttaw (135 in the Upper House and 255 in the Lower House). The Tatmadaw holds the second largest number of seats (see Annex 4).

Aung San Suu Kyi is the leader and chairperson of the NLD. She was not allowed to become president due to a constitutional restriction that bars candidates with foreign spouses or children from occupying that role in the executive. Suu Kyi became de facto leader in 2016, as the "state counsellor" of Myanmar.[25]

Union Solidarity and Development Party (USDP) is currently the main opposition party in Myanmar and remains heavily supported and backed by the military.[26] The State Law & Order Restoration Council (SLORC), the previous military regime, intended for the USDP to be the ruling party driving the transition from direct military rule.[27] The party has vowed to push for proportional representation in parliament if it wins the 2020 general election.[28]

Secondary Internal Stakeholders
Ethnic political parties are those that have formed along racial and religious lines. These parties rely on ethnic affiliation and contestation to centralization by the Bamar government to unify their members. After having won the 2015 elections, the NLD has been widely criticized for not being successful in enacting legislation or political reform to alleviate ethnic tensions. As such, ethnic political parties are emerging to tackle their own grievances and it is expected that the upcoming 2020 election will see many of these parties competing for power. This includes parties representing Kachin, Karen, Kayah, and Mon.[29] Some of these parties have merged together for a greater chance to beat the NLD[30] (see Annex 4).

Ma Ba Tha is the most prominent nationalist organisation.[31] The social and religious movement is founded on the protection and promotion of Buddhism. This group is led by widely respected, charismatic, and extremist Buddhist monks and upper level clergy members who have increasingly incited violence against the minority Muslim population in the past few years, mostly against the Rohingya of the Rakhine State.[32]

Border guard forces (BGF) and militias are subcontracted by the Tatmadaw for border security in an effort to conserve military resources. General Than Shwe had envisioned clemency and ceasefire for EAOs that were absorbed into the Tatmadaw as a BGF, or armed groups that transformed into pro-military militias.[33]

Civil-society organizations (CSOs) and service delivery **non-governmental organizations (NGOs)** have a strong legacy in Myanmar due to limited state presence and capacity in areas with weak central government control and armed conflict.[34]

Secondary External Stakeholders

China contributed 17.3 percent of Myanmar's overall foreign direct investment (FDI) in 2018. It is one of the country's main trading partners and aid donors.[35] Its economic interests in the region are high, with projects to build a port, a special economic zone, and road or rail infrastructure to move materials and supplies from the Bay of Bengal into the Yunnan Province.[36] Clashes between EAOs residing along the Myanmar-China border and Tatmadaw sometimes spill into China; Yunnan has sheltered thousands of refugees during these times.[37]

Japan and Myanmar have a long history, Japan having occupied the country during British colonization. Today, Japan is the third largest contributor to Myanmar's FDI, having contributed 7.6 percent in 2018.[38] This is set to create profits for Japanese companies and give the country access to Myanmar's raw materials and likely be more competitive with China.[39]

Thailand hosts the largest number of Myanmar emigrants. The primary motivations for migrating include economic, personal and safety/security reasons.[40]

Singapore was the largest foreign investor in Myanmar in 2018, having contributed to 41.1 percent of Myanmar's overall FDI.[41] The majority of its investment was in the information and communications sector, followed by the manufacturing sector and real estate.[42]

Fragility Risk Assessment

The following assessment illustrates the trend analysis for the past nine years (since 2010) based on available data. The following clusters are grouped into primary and secondary drivers of fragility. The primary drivers in Myanmar include governance, security and crime, and economic development. These drivers have a high impact on fragility. The secondary drivers include human development, environment, and demography as they have a moderate or lower impact on fragility. Refer to Annex 5 for additional information on the fragility risk assessment and the cluster analysis.

Legend			
Current impact on fragility	Low	Moderate	High
Trend over the last 9 years (or the most available data)	Improving ↑	Stable →	Deteriorating ↓

This legend illustrates how the following clusters were classified based on their current impact on fragility and trend over the last nine years. Current impact is determined by the effect of each cluster on fragility.

Governance - →	
Indicator	**Value and Trend**
Government Effectiveness World Bank WGI[43] Estimate of governance, ranging from approximately -2.5 (weak) to 2.5 (strong) performance.	-1.07(2018) Increasing trend from -1.62 in 2010
Voice and Accountability World Bank WGI[44] Estimate of governance, ranging from approximately -2.5 (weak) to 2.5 (strong) performance.	-0.89 (2018) Increasing trend from -2.07 in 2010
Regulatory Quality World Bank WGI[45] Estimate of governance, ranging from approximately -2.5 (weak) to 2.5 (strong) performance.	-0.75 (2018) Increasing trend from -2.24 in 2010
Corruption Corruption Perceptions Index 2018[46] A score of 0 is highly corrupt, 100 very clean	29/100 (2018) Ranked 132 out of 180 countries
Public Services Fragile State Index[47] Worst score is 10, best score is 0	8.3 (2019) Increasing trend since 2009
Human Rights and Rule of Law Fragile State Index[48] Worst score is 10, best score is 0	9.3 (2019) Decreasing trend since 2009
Control of Corruption World Bank WGI[49] Estimate of governance, ranging from approximately -2.5 (weak) to 2.5 (strong) performance.	-0.59 (2018) Increasing trend from -1.67 in 2010
Rule of Law	-1.03 (2018)

World Bank WGI Estimate of governance, ranging from approximately -2.5 (weak) to 2.5 (strong) performance.	Increasing trend from -1.55 in 2010
Freedom of Expression (Freedom of Press) Freedom House Index 2019[50] An aggregate score of 0 is worst, 100 is best	30/100 - partly free (2019) No clear trend due to change in methodology, but Myanmar was classified as 'not free' in 2009 and improved to 'partly free' in 2019.
Restriction on civil liberties Freedom House Index 2019[51] (1=most free, 7= least free)	5/7 (2018) Decreasing trend
Restriction on political rights Freedom House Index 2019[52] (1=most free, 7= least free)	5/7 (2018) Decreasing trend

Governance has been stable but slowly deteriorating since political liberalization in 2011. According to Freedom House, Myanmar was classified as 'not free' in 2009 and improved to 'partly free' in 2019. Freedom of expression in Myanmar has slowly worsened since the NLD came into power in 2015, and affects a wide range of people, including Facebook users, officials, and even students.[53] Myanmar is ranked poorly on nearly all governance indicators. Protection of Human Rights and Rule of law have been deteriorating since 2009 with a score of 9.3/10 according to the Fragile States Index.[54] Restriction on civil liberties has also been exemplified in the persecution of Rohingya. Despite rising concern and international condemnation for the Rohingya crisis,[55] the government remains steadfast in their approach to the situation; in fact, Aung San Suu Kyi will defend Myanmar against allegations of genocide brought on by Gambia at the International Court of Justice.[56] The current government has taken steps to address the military-drafted 2008 constitution that has institutionalized the military's political power. The NLD had previously declared that constitutional reform was a priority, and a democratic opening without any amendments or genuine rule of law, would simply be a 'window dressing'.[57] In the summer of 2019 lawmakers in the Charter Amendment Committee produced a report with over 3,700 recommended changes. However, any amendment to the constitution requires approval from more than 75 percent of lawmakers and allows the military to veto any proposed changes.[58] President U Win Myint and State Counsellor Daw Aung San Suu Kyi have declared their interest in the 2020 elections and are confident the NLD will win. However, the opposition party, USDP, is equally confident of a win. There are allegations that the Union Election Commission (UEC) is formed with a core of NLD supporters but U Myo Nyunt has denied the allegation, promising an impartial body and that the elections will be free and fair.[59]

Security and Crime – →	
Indicator	**Value and Trend**
Conflict intensity – annual sum for intensity level variable UCDP/PRIO Armed Conflict Dataset Intensity is coded for minor conflicts with 25-999 deaths per year (1) and wars at least 1,000 deaths (2).[60]	1 (2018) Stable trend from 2010 (1). The number of deaths each year has not surpassed 999.
Dependence on external military support (external intervention) Fund for Peace Fragile States Index[61]	7.7 (2019) Steady increasing trend, 6.5 in 2010.
Military Expenditure (% of GDP)	2.9% (2018)

World Bank - World Development Indicators (2012-2018)[62]	Steadily decreasing trend, 4.1% in 2015 (increasing trend from 2012-2015, 3.7% in 2012).
Political stability World Bank World Governance Indicators - Estimate of governance (ranges from approximately -2.5 (weak) to 2.5 (strong) governance performance)[63]	-1.31 (2018) Decreasing trend from 2010 (-1.29) to 2016 (-0.8). Increasing trend from 2017 (-1.08).
Refugees produced - Refugee population by country or territory of origin World Bank - World Development Indicators (2010-2018)[64]	1,145,154 (2018) Significant increasing trend from 2016 (490,289 in 2016). Steady increase from 2010-2016 (415,670 in 2010)
Terrorism – total # of fatalities START Global Terrorism Database (2010-2018)[65]	31 fatalities (2018) Steadily increasing, 13 fatalities in 2010
Terrorism - # of incidents START Global Terrorism Database (2010-2018)[66]	39 incidents (2018) Decreasing trend. There was significant and steady increase from 11 incidents in 2010 to 115 incidents in 2017

Myanmar has been characterized by steady and ongoing intrastate violence since independence. Ethnic minorities have been demanding autonomy from the federal structure[67] since 1948. The core causes of ethnic conflict in Myanmar include: political grievances related to ethnic self-determination, representation and equality; security and development grievances (absence of economic and social development in their regions); mistrust and resentment fuelled by failed peace agreements; repression of their cultural rights and religious freedoms; and lack of influence and power in decision-making processes.[68] [69] There is a breakdown of the state-social contract from the perspective of EAOs. For instance, there is a long history of failed bilateral ceasefire agreements in Myanmar. In 2013, the Thein Sein government began consultations and negotiations for a **nationwide ceasefire agreement (NCA)**. The current NCA that was finalized in 2015, aims to end the long history of civil war in Myanmar by reforming the country's fundamental political structures.[70] The NCA contributed to increasing political stability. However, there is ongoing lack of trust between EAOs and the government and the Tatmadaw. Only 10 EAOs have signed the current NCA. The EAOs that are not signatories formed the **Federal Political Negotiation and Consultative Committee (FPNCC)** in 2017 and proposed alternative principles for negotiation that counter the steps of the NCA process by stating that discussion on matters of ethnic self-determination and equality must happen before laying down their arms.[71] Land rights have been a significant point of contention between EAOs and the government. Reforms enacted under Thein Sein included new laws on the legal basis for land use rights and created a legal market to encourage foreign and domestic investment in the lands.[72] These social, political and economic cleavages between ethnic minority groups and the government contribute to horizontal inequalities in Myanmar. The results from the upcoming election in 2020 is a potential concern for the security and crime in the country. See Annex 10 for more information on conflict so far in 2019.

Economic Development – ↑	
Indicator	**Value and Trend**
Gross Domestic Product (GDP) per capita World Bank economic indicators[73]	1.326 (2018) Increasing trend

GDP World Bank economic indicators [74]	71.2 billion (2018) Increasing trend
External debt - % of Gross National Income (GNI) World Bank economic indicators [75]	21.2% (2018) Trend data not available
Foreign Direct Investment (FDI) FDI - % of GDP World Bank economic indicators [76]	1.8% (2018) Increasing trend; however, this low number is indicative of Myanmar changing its Fiscal Year months, not low investment. See annex 5 and 9.
Net Official Development Assistance (ODA) received (% of central government expenses) World Bank economic indicators [77]	13.8% (2017) Fluctuating trend from 7% to 46.5%
Inflation – consumer prices (annual %) World Bank economic indicators [78]	6.9% (2018) Increasing and decreasing; this has ranged from 1.5% to 9.5% in the past 10 years
Economic freedom Heritage Foundation[79]	53.6, mostly unfree (2018) Increasing trend, overall; slight decrease 2017-18
Infrastructure – reliability of electric supply - Electric power transmission and distribution losses (% of output) World Bank economic indicators [80]	Recent data not available. 20.4% (2014) Steady trend
Paying taxes - Total tax and contribution rate (% of profit) World Bank: Ease of doing business indicators[81]	31.2% (2018) Trend not available
Remittance received - % of GDP World Bank economic indicators [82]	4% (2018) Increasing trend
Trade - % of GDP World Bank economic indicators [83]	48% (2017) Increasing trend, 0.2% in 2010
Unemployment World Bank economic indicators [84]	National estimate: 0.9%; ILO estimate 1.6% Increasing trend

Overall, Myanmar's economy is improving. The past years have seen manufacturing and services sectors perform strongly, inflation moderate, the currency (Kyat) stabilize, and fuel prices decrease.[85] The country's GDP has increased steadily since 2010, when the country opened up its economy to the international community by easing trade restrictions, opening the financial sector to foreign competition, and undergoing mega infrastructure projects.[86] FDI has steadily increased, seeing the most investment from Singapore and China, respectively (see Annex 9). The level of international aid received has significantly increased since 2011. However, aid accounts for a small portion of GDP; in 2015, this was 4 percent.[87] Ultimately, growth is projected to continue with the support of more investment in infrastructure, the wholesale and retail sector, the insurance and banking sectors, and the manufacturing sector.[88]

There are also economic risks that may drive Myanmar into fragility. First, the informal sector and black market are large in Myanmar.[89] Second, there is a large power supply gap in the country that is constraining economic growth by dampening further investment interests.[90] Lastly, the most significant risk is associated with the extractive sector. Myanmar is a rentier regime that is rich in resources (see Annex 8). The Tatmadaw uses rents mostly from the extractive sector; however, it also uses rents from banking, tourism, transportation, construction, and real estate. Fearing that the government will assert authority over mining, the Tatmadaw has been using violence to retain the control of natural resources in different regions.[91] Furthermore, the revenue from these resources are channelled through the 'Union of Myanmar Economic Housing' and 'Myanmar Economic Cooperation' – two military-owned corporations;[92] this rent-seeking behaviour allows the military to retain a significant amount of power in Myanmar. Moreover, through smuggling some of these resources to neighbouring countries, ethnic minorities have been able to obtain weapons to defend their territories and what they view as their rightful resources.[93] Ultimately, despite Myanmar's recent economic developments, these risks pose a high threat to Myanmar's stability.

Human Development – ↑	
Indicator	**Value and Trend**
Under 5 mortality rate (per 1,000 births) UNICEF[94]	48.6 (2018) Steadily increasing trend 89.7 in 2008
Human Development Index UNDP (1990-2017)[95] Measures long and healthy life, access to knowledge, and a decent standard of living. Score of 0 is worst, score of 1 is best.	0.578 (2017) Ranked 148 out of 189 countries. Slowly increasing trend 0.519 in 2009
Prevalence of undernourishment (% of population) World Bank (2000 - 2017)[96]	11 (2017) Inconsistent (22 in 2008, 17 in 2010 and 11 in 2015)
People using at least basic sanitation services (% of population) The World Bank (2000-2017)[97]	64 (2017) Deteriorating (67 in 2010, 66 in 2013, 65 in 2015, and 65 in 2016)
Education - primary completion rate World Bank - World Development Indicators (2010-2017)[98]	96% (2017) Increasing trend
Education- lower secondary completion rate (total, % of relevant age group) World Bank - World Development Indicators (2010-2017)[99]	61.1% (2017) Increasing trend
Food Security (prevalence of undernourishment - %) FAOSTAT[100]	10.6% (2016-2018) Increasing trend
Health Expenditure (% of GDP) World Bank - World Development Indicators (2010-2018)[101]	5.1% (2016) Increasing trend since 2010
Infant mortality (per 1,000 live births) World Bank - World Development Indicators (2010-2018)[102]	36.8 (2018) Decreasing trend since 2010
Literacy (% of people ages 15 and above)	75.6 (2016)

World Bank - World Development Indicators (2010-2018)[103]	No trend data

According to the World Bank, Myanmar's positive trend in poverty reduction is expected to continue due to strong growth. The poverty rate has decreased from 48 percent in 2005 to 25 percent in 2017. Although the poverty rates are declining in urban areas, it remains 2.7 times higher in rural areas.[104] Education is improving fairly consistently at the primary level but remains low for secondary and tertiary education. The Ministry of Education received an allocation of 1,784 billion MMK in 2017/18. Over the past six years, it has more than doubled as a portion of the total budget, and now represents 7.75 percent of total government expenditure.[105] Myanmar has made significant improvements in Millennium Development Goal indicators for disease control but is lagging in maternal and child health targets and indicators. Many problems in the field of healthcare still exist. Almost 70% of the population resides in rural areas. Despite an increase in the health workforce, there is an uneven spread of skilled health workers between urban and rural areas. Although the health conditions in Myanmar have been improving, there is a serious lack of facilities and healthcare professionals.[106] There are shortages in medicines and commodities, poor availability of basic amenities, and low diagnostic capacity, which has led to ineffective and inefficient service delivery.[107] Myanmar's National Health Plan (NHP) for 2017-2021 has laid out the vision of achieving Universal Health Coverage by 2030. The NHP aims to improve the delivery of health services and financial protection through substantial investments in frontline service delivery units and through a range of reforms in the health system, including health financing.[108]

Environment – ↑	
Indicator	**Value and Trend**
Arable land - hectares per person World Bank environment indicators [109]	0.2 (2016) Steady trend
Consumption - Energy use per capita (kg of oil equivalent) World Bank environment indicators [110]	369.3 (2014) Increasing since 2010 but no recent data available
Energy intensity - Energy use per $1,000 GDP (constant 2011 PPP) World Bank environment indicators [111]	78 (2014) Steadily increasing and decreasing since 2009. Recent data not available.
Disaster risk Global Climate Change Index[112]	High (2018) Steady trend
Environmental performance Yale Environment Performance Index[113] (0-worst, 100=best)	45.32 (2018) Trend data not available
Forest – % of land World Bank environment indicators [114]	43.6% (2018) Decreasing slightly
Pollution – CO2 Emissions per capita (metric tons per capita) World Bank environment indicators [115]	0.4 (2014) Increasing slightly from 2010 but recent data not available.

Although it was difficult to find recent data on environmental indicators in Myanmar, the available information indicates that the country's environment is stable. Further research using qualitative methods indicate that there is a slight increase in environmental vulnerability; however, the

country is not substantially damaging the environment and the government has also put forth efforts to mitigate and adapt to climate change.[116] Myanmar's risk of natural disaster has been high for years. It is exposed to cyclones, earthquakes, floods, landslides, tsunamis, and volcanoes. All of these also come with high social and economic costs. In 2008, Cyclone Nargis hit the country, killing over 84,000 people and affecting one-third of the population. This was Myanmar's worst natural disaster in history and cost the country US$4 billion. In 2015, Myanmar was hit with heavier than usual rainfall, which led to flooding and landslides. Over 1.6 million people were displaced.[117] In June 2019, 82 people were killed, 200,000 displaced, and 49 injured from further flooding and landslides.[118] The government has had trouble responding to these disasters and other environmental concerns that Myanmar faces. This is due to various capacity, institutional, and resource constraints.[119] However, earlier this year, President U Win Myint announced two new policies aimed at environmental protection and climate action: the National Environmental Policy and the Myanmar Climate Change Policy.[120] These policies focus respectively on 1) clean environment, healthy and functioning ecosystems, sustainable economic and social development, mainstreaming environmental protection and management,[121] and 2) food and water security, healthy ecosystems, low-carbon and resilient growth, resilient urban and rural settlements, human wellbeing, and awareness and research.[122]

Demography and Population – →	
Indicator	**Value and Trend**
Total population World Bank - World Development Indicators (2010-2018)[123]	53.7 million (2018) Steadily increasing trend (50.6 million in 2010)
Population ages 15-64 (% of total population) World Bank - World Development Indicators (2010-2018)[124]	67.8% (2018) Steadily increasing trend (65.1% in 2010)
Population density – **people per sq. km of land area** World Bank - World Development Indicators (2013-2018)[125]	82.24 (2018) Steadily increasing trend (79.40 in 2013)
Population growth – annual % World Bank - World Development Indicators (2010-2018)[126]	0.6% (2018) Currently a stable trend (0.7% in 2010, 0.8% 2011-2015)
Urban population growth (annual %) World Bank - World Development Indicators (2010-2018)[127]	1.5% (2018) Steadily increasing trend (1.4% in 2010)
Rural population growth (annual %) World Bank - World Development Indicators (2010-2018)[128]	0.2% (2018) Increasing from 2010-2013 (0.4% to 0.6%) and decreasing from 2014 (0.5%)
Life expectancy at birth, total (years) World Bank - World Development Indicators (2010-2017)[129]	66.6 (2017) Steadily increasing trend (63.5 2010)
Net migration – (# of immigrants – # of emigrants) World Bank - World Development Indicators (2012, 2017)[130]	-816,564 (2017) Increasing emigration from Myanmar, data only available from 2012 (-528, 211)

The population in Myanmar is marked by population diversity. Myanmar is composed of 68% Bamar, 9% Shan, 7% Karen, 4% Rakhine, 3% Chinese, 2% Indian, 2% Mon, and other ethnic groups constitute 5% of the population. Many of these ethnic groups inhabit and occupy specific areas of the country (see Annex 6). Buddhism is the most common religion in Myanmar; 87.9% identified as Buddhist.[131] The military junta imposed Bamar Buddhism in an attempt to unify the multiethnic country,[132] contributing to horizontal inequalities. The most prominent case of demographic and population tension in Myanmar pertains to the Rohingya population. Muslims account for 4.3% of the population[133] and they are seen as illegal migrants.[134] Migration from the Myanmar population is driven by two main things: forced migration due to conflict and labour migration. Myanmar has experienced steadily increasing urbanization and rural to urban migration due to perceived certainty and regularity of urban jobs. Employment opportunities are created in urban areas due to economic growth from increased construction, increase in manufacturing output, and the resulting expansion in services.[135]

ALC Analysis

Drawing on the information from the cluster analysis, the following section details an examination of the authority (A), legitimacy (L) and capacity (C) dimensions within Myanmar that contribute to its core structural fragility. Authority is the extent that a state possesses the following abilities: to enact binding legislation, exercise coercive force over sovereign territory, provide core public goods, and provide a secure and stable environment. Legitimacy is the extent a state commands and possesses public loyalty and is able to generate domestic support for the government's legislation and policies. Lastly, capacity is the extent the state can mobilize and employ their resources towards productive ends, such as service provision and being able to effectively respond to sudden shocks.[136]

Authority:
State authority in Myanmar is low. Although the military exercises a great deal of control over governance, the state does not have a monopoly on violence. There are several EAOs that are fighting for their right to self-determination and recognition of ethnic rights, culture, and language. As the state is unable to provide adequate public services, EAOs seek civilian support by establishing systems that provide these services.[137] As a rentier state, the military uses revenues from the extractive sector, banking, tourism, transportation, construction, and real estate to uphold its power and withhold fair distribution to all parts of the country.[138] This leads to an authority-legitimacy feedback loop, explained below.

Legitimacy:
Legitimacy remains weak in Myanmar despite efforts to improve popular public support for the government. Due to significant political and social cleavages, understanding public loyalty and support for domestic policies and legislation may depend on which state the citizen resides in or which ethnic or religious group they identify with. The lack of public loyalty is a result of the weak social contract and persisting horizontal inequalities due to the dominance of Bamar Buddhism. The ongoing lack of trust between EAOs and the government/military is epitomized in both sides blaming each other for the delays in the peace process.[139] Following their electoral win, the NLD government released political prisoners and detainees. And yet, other repressive laws remain in place such as restrictions on the rights to freedom of expression and assembly, and legal restrictions

on media freedom. There are significant human rights abuses due to ethnic armed conflicts and ongoing discrimination and violence, particularly against Rohingyas.[140] Furthermore, thorough support for the government's legislation and policies will never be gained if it is seen to undermine the military's own authority and interest. The Tatmadaw can veto any legislation it deems to be damaging to its own goals since they command 25% of Parliament.

<u>Authority-Legitimacy Feedback Loop:</u>
Authority and legitimacy are the clearest drivers of fragility in Myanmar, with low levels of authority creating a feedback loop that reduces legitimacy. This loop is due to 1) the Tatmadaw's reliance on resource revenues to finance itself, bankroll leaders, and sustain local militias, and 2) the dissatisfaction of ethnic minorities from having little control over resource revenues and their lack of self-determination.[141] The resulting rentier regime decreases state legitimacy, as it contributes to ongoing inequalities and ethnic tension. The incentives that the military has to maintain the status quo are higher than the incentives it has to implement change, which would require high levels of structural change in the country's current system of using rents. As such, this feedback loop is a result of mutually reinforcing structural constraints built around a rent economy. As long as these revenues are available, the military is secure.[142] And as long as the military is acting in this way, other ethnic groups will remain dissatisfied and tensions will continue to build.

Capacity:
Myanmar struggles in the area of capacity due to its horizontal inequalities along ethnic-religious lines and its inability to deliver adequate services. The country has a poor taxation system that relies mostly on less valuable resources. State and regional governments have constrained revenue bases and continue to rely on transfers from the central government, even though many states are rich in valuable resources. Public goods and services are poor (secondary and tertiary education, health, water delivery) which contributes to poor state-society relationships. CSOs and NGOs have contributed to service delivery in areas where there is limited state presence, weak central government control and armed conflict.[143] For example, in rural Buddhist communities, CSOs emerged to decrease vulnerabilities and improve household resilience to address insecure waged work, decline of social safety nets and price inflations.[144] There remains challenges to policy making and public administration. Although there is more inclusive policy making with a democratically elected government, a culture of hierarchical decision making and ruling persists.[145]

Scenarios

Most likely scenario over the next 10 months (December 2019 to October 2020):
Despite the recommended changes from the Charter Amendment Committee, the military will veto any amendments to the constitution, maintaining their institutionalized political power. The NLD will run in the election with many of the same promises of national reconciliation, democracy and prosperity, but there is no guarantee that anything will change after their expected win in 2020. Religious and ethnic tension remains as is or will continue to increase, fostering greater tension against the central government. The national peace process will remain stagnant due to disagreements on the procedures for a ceasefire and political negotiation from non-signatory members of the NCA.

Best case scenario over the next 10 months (December 2019 to October 2020): All of the major EAOs – including the Northern Alliance and the FPNCC – sign the NCA and hold a peace conference before the 2020 elections. This would include thoughtful negotiations where all groups are heard with real intentions to resolve grievances. The military reduces its operations and lowers its level of control in the state, including to agree to move away from their reliance on resource rents. Economic diversification away from resource rents will foster greater FDI and result in ongoing economic growth. The Charter Amendment Committee's 3,765 recommendations to change and amend the 2008 constitution are accepted and implemented. Citizenship issues, especially regarding the Rohingya, are addressed in a non-violent and just way, with grievances heard and rights restored. There is an equitable distribution of economic gains and resources. Mitigation and adaptation measures to deal with environmental concerns are successful and the capacity to address these concerns is significantly enhanced.

Worst case scenario over the next 10 months (December 2019 to October 2020): The NLD continues to lose support throughout the country as they are unable to meet expectations of minority ethnic and religious groups. The Commander-in-Chief decides to run in the upcoming election to reinstitute direct military rule under the guise of democracy. The Tatmadaw reinforces their power within Myanmar by taking control over all resource rents. This would significantly exacerbate rural-urban and ethnic-religious tensions, leading to increased levels of violence. Abuses of civil and political rights and liberties continues, leading to international sanctions placed on Myanmar for human rights abuses.

Wild card scenarios over the next 10 months (December 2019 to October 2020):
Natural disaster: A cyclone hits the country killing and injuring thousands of people, causing severe damage to infrastructure, and increasing tension between the government and ethnic minorities. The new environmental policies have not yet been widely implemented and were unsuccessful in developing adaptation strategies.

Forced repatriation of Rohingya: Bangladesh and Myanmar reach an agreement to repatriate the Rohingya without any guarantee of providing them with rights and safety; in fact, there is a likelihood of persecution. This leads to continued human rights abuses and the international community may react negatively.

Further international legal cases and sanctions: Other countries join Gambia in suing Myanmar over its actions against the Rohingya.[146] Countries may also impose sanctions. The military can respond by either succumbing to international pressure to reform in some way or by remaining as they are.

Policy Options

Option 1: Economic Diversification

The NLD should develop policies to diversify the economy and find different means of generating revenue. This could be achieved by strengthening the country's tax system and reducing the country's reliance on resource rents.

Relevance: A reliance on resource rents and an invariable economy feeds into authority and legitimacy issues. Rents do not allow for fair distribution and there is a risk that they will not always exist as a source of revenue. Myanmar has one of the lowest tax rates in Southeast Asia, accounting for a much lower percentage of GDP in comparison with other countries (7.5% in 2017).[147] Strengthening the country's tax system can expand the tax base, modernize the tax administration system, and increase public knowledge on taxation to build trust in the government.[148] Furthermore, this could lead to a more equitable distribution of economic gains and resources, and slowly reduce the military's hold on power in this area. Diversifying the economy should focus on creating enabling environments for job creation across sectors and strengthening regional and international cooperation.

Entry points: The NLD should work with the Ministry of National Planning and Economic Development and the Ministry of Planning and Finance. These organizations play a critical role in Myanmar's economic planning. The NLD could also look to relevant trading partners, such as China, Singapore, and Japan, to increase trade and FDI. It should also work with Western powers and aim to decrease negative perceptions of the country.

Risk: As Myanmar remains a hybrid rentier regime, the military may resist this policy option and it may be difficult to foster cooperation among the population in regards to a strengthened tax system. However, improved access to services cannot be enabled without doing so. Furthermore, regional partners, especially China, may feel threatened by Myanmar working closely with Western countries.

Evaluation: This can be evaluated by implementing a transparent and regulatory framework for taxation and monitoring both the level of revenue generated from this for the government as well as revenue distribution. Furthermore, monitoring the level of job creation by sector as well as international partnerships, will help evaluate the effectiveness of this policy.

Option 2: Diversify the Membership Within the Political Party

As a main political party in Myanmar, it is recommended that the NLD should encourage individuals from other ethnic and religious minority groups to become members. The party should actively recruit members or merge smaller ethnic and religious political parties that share many of the same values and ideals, into the NLD. This may require concessions and compromises from the NLD in order to be a more inclusive political party.

Relevance and entry points: This policy will address the primary drivers of fragility in Myanmar by improving political legitimacy of the NLD ahead of the next election. By allowing for more political representation from ethnic and minority groups, the NLD would address political grievances about power sharing and ethnic capacity.[149] The NLD succeeded in ethnic stronghold areas in the 2015 elections. However, with over 100 political parties expected to participate in the next election, many of these will be from newly created ethnic political parties,[150] there is no guarantee the NLD will receive the same kind of support. Strategic alliances can be made with these newly emerging ethnic minority political parties to provide them with an arena for political

engagement. NLD membership and candidate selection should reflect the diversity of the country to bridge the political, social and economic cleavages and grievances.

Risks: The potential for increased political factionalism due to the lack of political representation may erupt in intensified violence and conflict. If the NLD membership is only comprised of majority Bamar Buddhists, it risks alienating individuals from ethnic and religious minority groups. It may also be more difficult to engage with these other minority groups due to the risk of intensified polarization, as these ethnic and religious groups merge to form larger parties.

Evaluation: Annual review of party membership registration should be conducted to ensure there is adequate representation of ethnic and religious minority groups in the NLD.

Option 3: Develop a Working Document for the Ongoing Peace Process

The NLD should develop a working paper for the NCA to serve as a guide for their approach towards their desired outcomes of the peace process. This document should also clarify terms of engagement that were vague in the NCA. The NLD should guarantee the involvement of all EAOs and ensure a certain percentage of women are represented in the peace dialogues. Furthermore, the NLD should put in place measures of accountability for the use of the Peace Fund, as well as consider allowing neutral international ceasefire monitoring.

Relevance: The current ceasefire agreement, which includes the Government of Myanmar and only 10 EAOs, is not widely accepted. There remain fundamental disagreements between the FPNCC and the government on the order of steps for the peace process.[151] Moreover, non-signatories of the NCA sense a lack of commitment from both the government and the military to advance a viable peace agreement in a timely fashion.[152] This document would provide a clear signal that ceasefire agreements play a crucial role in ending armed conflict[153] and also bring different factions together to be heard and resolve grievances. These agreements are often the primary tool to reduce or stop violence and create a space for political negotiations. A working document that includes the NLD's specific guidelines to the peace process will reduce any uncertainties or ambiguities on the position and approach of the party.

Entry points: The NLD should consult with a variety of stakeholders such as women's groups and civil society organizations, to create a comprehensive and inclusive document. Research has shown that the participation from these groups will improve the success of a peace agreement. In creating this working document, the NLD should seek advice from other successful peace process negotiators or special UN envoys.

Risks: EAOs may not consider the NLD a legitimate political party given their membership is primarily comprised of Bamar Buddhists. As such, these ethnic groups may resist the NLD's approach to the peace process. The possible implementation may lead to further tension and violence between the government and EAOs. Moreover, different stakeholders may continue to take advantage of ceasefire capitalism.

Evaluation: A specific team within the NLD should be assigned with publishing the final working document. The consulted stakeholders should approve the document before its publication.

Annex 1: Definitions

Hybrid regimes are systems that are in between democracy and authoritarianism. Menocal, Fritz and Rakner define these regimes as "'ambiguous systems that combine rhetorical acceptance of liberal democracy, the existence of some formal democratic institutions and respect for a limited sphere of civil and political liberties with essentially illiberal or even authoritarian traits.'"[154] Myanmar exhibits many of the traits associated to hybrid regimes due to the presence and power of the military in their government. The Tatmadaw remain unaccountable and control key economic and political institutions. Furthermore, the government does not have full trust from the entire society nor is there full political participation, particularly from ethnic and religious minority groups.

A rentier regime is one that 'derives most of its revenues from renting indigenous resources to external clients.'[155] In Myanmar, the Tatmadaw uses rents mostly from the extractive sector; however, it also uses rents from banking, tourism, transportation, construction, and real estate.[156]

Horizontal inequalities refer to the "'inequalities in economic, social, or political dimensions or cultural status between culturally defined groups.'"[157] As a multidimensional concept, severe horizontal inequalities can be a source of conflict. History has shown in Myanmar that the lack of attention given to addressing inequalities has resulted in conflict and violence. One of the policy options listed in the brief addresses horizontal inequalities by proposing the inclusion and membership of ethnic and religious minority groups into the NLD.

Ceasefire capitalism refers to "the particular modes of finance, landscape production, governance, and military–state formation within ceasefire spaces that together co-emerge over time. Ceasefire capitalism emerges through (trans-) national businessmen and ethnic political elites…that together reconstruct a political-economic and biophysical frontier landscape increasingly conducive to military–state control. Primitive accumulation as a continuous unfolding of the violent and recursive cycle of the (re-) production of capital…provides an apt framing for ceasefire capitalism and governance, backed by militarism."[158] This has been successfully used by both military and EAOs in Myanmar to maintain sources of revenue in rural areas rich in natural resources.

Annex 2: Additional Information on Stakeholders

National League for Democracy (NLD) won a significant majority in the 2015 election, winning 85% of the seats in the lower parliamentary house. In the most recent by-election in 2018, the NLD won only seven of the thirteen available seats. This could signal a potential threat to their victory in the 2020 elections as the seats that were lost were in ethnic minority areas.[159] However, the NLD is expected to win a majority in the upcoming elections and remains popular.[160]

Aung San Suu Kyi is the daughter of Myanmar's independence hero, General Aung San. She spent much of her time between 1989 and 2010 in some form of detention due to her efforts to bring democracy to the then military-ruled Myanmar. She was once seen as a beacon for universal human rights - a principled activist willing to give up her freedom to stand up to the ruthless generals who ruled Myanmar for decades. This earned her a Nobel peace prize for non-violent struggles against the previous regime.[161] This reputation has somewhat deteriorated over the years with critics saying she has lost the moral standing and should be striped of her noble peace prize for her unwillingness to stand up against human rights violations of ethnic minorities. In a recent development, the City of London stripped her of their highest honour, 'honorary freedom'. Aung San Suu Kyi was given the City's top honour for non-citizens in May 2017, decades after she was awarded the Nobel peace prize.[162]

The power of the **Tatmadaw/military** was solidified in the State Law and Order Restoration Council (SLORC) and state peace and development council that allowed for military expansion, creation of military owned enterprises, elevation/promotion of regional commanders, and ceasefire diplomacy.[163] The military has used its prolonged control of the state to become the most dominant economic and political force in Myanmar.[164] The Tatmadaw has been able to indirectly rule Myanmar since 2011. The 2008 constitution has entrenched the military's power in Myanmar: they are allowed to exclusively appoint one of the two vice presidents, military affairs operates without any civilian oversight and the Tatmadaw is responsible for the appointment of the defence, home affairs and border affairs ministers.[165] Throughout formation of the country, the military-led government sought to capture rents from the resource economy,[166] thus developing economic self-interests in continuing their military rule.[167]

Since the 2000s, land and resource concessions were granted to higher level military officials in national and provincial capitals to generate personal revenue, and as a result increased their economic and political power. The country's state-owned economic enterprises are nominally under military control. These enterprises generate undisclosed revenues that bypass government treasuries.[168] For instance, the Defense Ministry owns **Myanmar Economic Holding Ltd.** and **Myanmar Economic Cooperation.** Moreover, the Commander-in-Chief is the head of the board for Myanmar Economic Holding Ltd. Together these two enterprises own approximately 120 businesses involved in various sectors and hold licences for jade and ruby mining in Shan and Kachin states.[169] These enterprises are able to generate substantial profits from commercial services and natural resources, enabling the Tatmadaw to accrue massive personal wealth for top military members.[170]

The military has been able to maintain their power and control in Myanmar by using strategic violence during the democratization process. The Tatmadaw has been able to selectively encourage

conflict in economically viable areas to retain non-democratic prerogatives, including the jade mining sector. This system has allowed for the rents from jade mining to be taken by the military and diverted away from the civilian government. By stoking violence at specific times and in specific regions, the military has provided themselves a means of maintaining an existing system of profit and protection. The Tatmadaw is able to exploit the unrest and convince uncertain civilian governments to cede control to the military, and to prevent the development of alternative authorities. Prior to the democratization process, the military junta colluded with EAOs to share the profits from mining and smuggling.[171]

The Tatmadaw has also employed ceasefire capitalism. By signing bilateral ceasefire agreements with individual armed groups, there is a collaborative exploitation of the areas' resources by army generals, insurgent leaders and businessmen. Many of these agreements were negotiated in the 1990s and demonstrated how economic incentives could bring rivals to the negotiation table by turning rebel leaders into businessmen. Many EAO leaders also entered the ceasefire agreements and subsequently benefited economically. These peace deals for groups that occupied borderland territories were also aided by China, who wanted to exploit Myanmar's economic resources as well.[172] Please refer to the KIO/KIA example below. The Tatmadaw may not be looking for conflict to escalate into a war, but they are strategically employing violence to dissuade the civilian government from exerting control in these areas which allows them to continue to exploit the natural resources. Maintaining a low level of insecurity, upholds a narrative whereby military forces are consistently needed[173] and justifies their hold on power.[174]

National Defense and Security Council is composed of 11 members whereby six are appointed by the Commander-in-Chief of the Tatmadaw. This council possesses the executive and judicial powers to declare a state of emergency, dissolve parliament and take over the legislature.[175]

Border Guard Forces (BGF): Many large EAOs rejected the proposal from the military to become a BGF or militia due to disagreements over the ratio of troops from the military and ethnic militias, as well as contestations over who would have command and control over the units.[176]

Min Aung Hlaing, was named Commander-in-Chief in 2011 and possesses significant political power in Myanmar. He retains complete authority over enforcement (police, border guards and the General Administration Department),[177] as well as the ability to appoint all military representatives that form 25% of the Hluttaw.[178] Min Aung Hlaing is a central figure in the ongoing Rohingya crisis.

The **Rohingya** are a Muslim minority group and continue to endure unequal treatment in Myanmar. The central government has previously constructed and superimposed a collective identity of the Rohingya as illegal immigrants.[179] Property transfer laws prohibit handovers to, or from, foreigners and stateless residents also cannot legally, buy or sell property, or set up businesses. This pertains specifically to the Rohingya as they are seen as foreigners or illegal immigrants in Myanmar.[180] The Rohingya language is not considered official, their land is periodically confiscated[181] and they are deliberately excluded from institutionalized political discussions, thus preventing them from playing a significant role in national politics.[182]

The government has not stopped the violence against the Rohingya. Since August 2017, there has been worldwide recognition of widespread ethnic cleansing in Rakhine state. The military is accused of committing mass killings, widespread arson and sexual violence against the Rohingya people.[183] Aung San Suu Kyi has even denied that the Rohingya are subject to ethnic cleansing despite evidenced persecution and more than 400,000 fleeing to Bangladesh.[184]

Parliament (Hluttaw): In the Upper House, 168 seats are elected, representing different regions and states, and 56 seats are appointed to the military. In the Lower House, 330 seats are elected, representing different townships, and 110 are appointed to military.[185] While both houses function as independent chambers and they are supposed to have equal powers, the Lower House holds more seats and as such, tends to be more dominant.[186]

The 2015 elections saw a high turnover of members of parliament, with only 13 percent of incumbent members having secured their seat. On one hand, this can be viewed as a positive change moving towards consolidating Myanmar's transitional process. On the other hand, high turnover in a new democracy can be detrimental to its stability and effectiveness. As such, the Hluttaw holds a significant role in Myanmar; it is important that committed and professional members of parliament return in the next election period in an effort to hold their positions, challenge competitors, and ultimately move forward the continuing institutionalization of Myanmar's post-authoritarian democracy.[187]

Ethnic Armed Organizations:
Karen National Union (KNU), founded in 1947, aims to represent the rights of the ethnic Karen people and to create a Karen state with the right to self-determination.[188] **Karen National Liberation Army (KNLA)** was created in 1968 as the armed branch of the KNU. In 2012, a bilateral ceasefire agreement was signed with the government.[189] KNU is also a signatory to the 2015 NCA.

Northern Alliance consists of four EAOs: **Arakan Army (AA)**, **Ta'ang National Liberation Army (TNLA)**, **Myanmar National Democratic Alliance Army (MNDAA)** and **Kachin Independence Organization (KIO)/Kachin Independence Army (KIA)**. This group was formed in 2016 under the initiative of the KIA to strengthen their position by providing training and support to the AA, TNLA and MNDAA.[190]

KIO/KIA is one of the oldest and strongest EAOs in Myanmar. It was founded in 1961 as a result of the repressive state policies that discriminated against ethnic minorities.[191] The KIA has been in conflict with the Tatmadaw for many decades. These two groups were able to negotiate and implement a bilateral ceasefire agreement from 1994-2011.[192] This ceasefire agreement was not created to resolve political grievances, rather it was implemented to establish mutually beneficial arrangement in their shared interest in the jade trade.[193] Co-opting EAO leaders into peace with business concessions ultimately backfired as it left the underlying grievances unaddressed and created new tensions between the two groups. The peace deal also undermined the legitimacy of reigning KIO leaders, which provided space of emerging faction of young officers to take over. Tensions and conflict re-emerged when the central government demanded that various armed groups transform into **BGFs**, to legalize these groups into militias under military command. The young KIO officers ultimately took control of the organization and rejected the proposal to

transform into a government militia.[194] [195] KIO/KIA has been able sustain itself predominately on the natural resources in the region. In the 1990s, the organization lost control over the jade mines and had to look for alternative revenue generating activities. They relied on exporting and directly taxing a large percentage of timber to China. KIO/KIA was able to sustain itself by facilitating and taxing logging in the Kachin state.[196]

AA was formed in 2009 and are located and occupy the Rakhine state. This EAO was included in the Northern Alliance as many migrant workers in the Kachin jade mines were from Rakhine.[197] AA also seeks self-determination of the Arakan people. The Rakhine state is a strategic stronghold given the abundance of natural resources and occupies a geostrategic location between India, China and the Mekong valley.[198]

TNLA is the armed wing of the **Palaung State Liberation Front (PSLF)** and remains active in the Shan state. TNLA has supported PSLF's agenda of fighting for the freedom of the Palaung people, and the creation of a separate Palaung state.[199]

MNDAA was created in 1989 as a splinter group from the **Communist Buddhist Party,** and sought to re-establish self-administration in the Kokang region. For nearly 20 years, MNDAA was able to main a working relationship with the central government authorities. The EAO profited from tax collection, drug trade, and other illicit activities. The Myanmar army was also allowed to establish bases in strategic parts of Kokang district. But in 2009, the MNDAA along with the other Northern Alliance members rejected the Government's ceasefire demand that they had to transform into a BGF under the command of the Tatmadaw.[200]

Brotherhood Alliance is made up for three EAOs the AA, TNLA and MNDAA. These EAOs conducted coordinated attacks in August 2019, in the Mandalay region and Shan state in response to the military aggression in Shan and Rakhine states. These attacks were used as a symbol of their rejection of the government's proposed terms for bilateral ceasefire agreements, including relinquishing their territories. The Brotherhood Alliance's broader objective is to compel the military and government to accept ceasefire terms that will grant these groups political recognition, cementing their territorial gains and to give them access to new economic opportunities.[201]

The Association for the Protection of Race and Religion, commonly referred to by its Burmese-language acronym **Ma Ba Tha,** is one of the most prominent nationalist organizations in Myanmar. Ma Ba Tha's popularity stems from ideology and the sense of prestige, belonging and direction it can give to its supporters. Supporters of this organization see Buddhism and the state as inseparable. Since 2011, there have been many factors that contribute to the pervasive sense of angst and threats shared by the majority Buddhist community, including demographic fears, economic and cultural anxieties and regional dynamics. The angst and tension in monastic communities and Buddhist society at large, derives from the rapid changes the country is experiencing. Their supporters fear that secularism and modernity threaten the tradition role of Buddhism. Ma Ba Tha has been able to create a narrative that it is reluctantly stepping in where the government has been ineffective. The grassroots support for the organization is flourishing where the government is seen to be weak, especially in the provision of basic services such as education, access to justice and disaster relief. [202] The Ma Ba Tha have far greater legitimacy on religious issues in the eyes of many Myanmar Buddhists than the government or state religious

authorities. Efforts by the government to crack down on the organization have only amplified the perception that they are weak protectors of the faith. Riots and activities of this group, which have been the cause of much of the internal and external displacement of Myanmar Muslims, have therefore been largely ignored by the police.[203] The government has yet to declare Ma Ba Tha an unlawful association, as this might lead to severe, likely violent, reverberations across the country. Ma Ba Tha does not simply focus on political nationalism - it has a prominent role in religious and civic education, service delivery and dispute resolution.[204]

China has defended the Myanmar government on the crisis in Rakhine state and protected Myanmar from sanctions at the United Nations. Private actors in China contribute to conflict through illicit cross-border trade and mercenary services. This provides revenue to different EAOs.[205] China and Myanmar recently signed a 15-point memorandum of understanding on the China-Myanmar Economic Corridor, which links the province of Yunnan with commercial hubs in Myanmar (including water ports, essential for transporting oil).[206] Myanmar has much to lose if its relationship with China deteriorates, such as protection from a member of the UNSC, a key economic partner, and a source of investment.[207]

China employs a principle of non-interference in most states; however, in Myanmar it is assertively involved in the peace process and has made efforts to stay involved and shape key decisions.[208] Furthermore, China has designated a special envoy to Myanmar as a lead contact and formal observer of Myanmar's peace talks who takes part in facilitating the process between EAOs and the Myanmar government.[209] Chinese interests in reducing conflict are in line with border security and maintaining close economic ties; however, at the same time, genuine peace could risk China's strategic position in the country. Friction between the Tatmadaw and EAOs allows China influence over these groups and peace would reduce their influence.[210]

Japan: After its independence, Japan contributed to Myanmar's economic development through war reparations and official development assistance (ODA). Myanmar's transition to a constitutional government increased Japan's ODA and the country also forgave many debts to establish special economic zones.[211]

Thailand borders the following areas: Kayah state, Kayin state, Mon state, and Tanintharyi region. Many of the labour migrants are from the Shan ethnic group or Shan-speaking as the language is quite similar to Thai, and mainly occupy low-paying jobs.[212]

Singapore: Earlier this year, Singapore deported a group of Myanmar nationals for rallying in support of armed violence against the Government of Myanmar.[213]

Annex 3: List of Ethnic Armed Organizations in Myanmar

The list below details some of the ethnic armed organizations in Myanmar, their status with the nationwide ceasefire agreement (NCA) and any alliance they may be a part of.[214] This is not an exhaustive list of all EAOs that exist in Myanmar.

10 EAOs have signed the current NCA and the majority of the remaining EAOs that are not signatories, formed Federal Political Negotiation and Consultative Committee (FPNCC) in 2017 and proposed alternative guidelines for the peace process negotiation.

| Ethnic Armed Organization	NCA Status	Alliance
AA: Arakan Army	Non-Signatory	FPNCC and Northern Alliance
KIO/KIA: Kachin Independence Organization/Kachin Independence Army	Non-Signatory	FPNCC and Northern Alliance
MNDAA: Myanmar National Democratic Alliance Army	Non-Signatory	FPNCC and Northern Alliance
PSLF/TNLA: Palaung State Liberation Front/Ta'ang National Liberation Army	Non-Signatory	FPNCC and Northern Alliance
SSPP/SSA-N: Shan State Progress Party/Shan State Army-North	Non-Signatory	FPNCC
UWSA: United Wa State Army	Non-Signatory	FPNCC
NDAA: National Democratic Alliance Army	Non-Signatory	FPNCC
KNPP/KA: Karenni National Progressive Party/Karenni Army	Non-Signatory	
NSCN-K: National Socialist Council of Nagaland-Khaplang	Non-Signatory	
ABSDF: All Burma Students' Democratic Front	Signatory	
ALP/ALA: Arakan Liberation Party/Arakan Liberation Army	Signatory	
CNF/CNA: Chin National Front/Chin National Army	Signatory	
DKBA (Benevolent): Democratic Karen Benevolent Army (2010-)	Signatory	
KNU/KNLA: Karen National Union/Karen National Liberation Army	Signatory	
KPC: KNU/KNLA Peace Council	Signatory	
LDU: Lahu Democratic Union	Signatory	
NMSP/MNLA: New Mon State Party/Mon National Liberation Army	Signatory	
PNLO/PNLA: Pa-Oh National Liberation Organization/Pa-Oh National Liberation Army	Signatory	
RCSS/SSA-S: Restoration Council of Shan State/Shan State Army-South	Signatory	

Source: Bynum[215]

Annex 4: Hluttaw Seat Composition and Ethnic Political Parties

Table 2: Seat composition of the Union Parliament after the 2015 elections

Political Parties	Pyithu Hluttaw	Amyotha Hluttaw	TOTAL
National League for Democracy	255	135	390
Tatmadaw	110	56	166
Union Solidarity and Development Party	30	11	41
Arakan National Party/Rakhine National Party	12	10	22
Shan Nationalities League for Democracy	12	3	15
Ta-Arng (Palaung) National Party	3	2	5
Pao National Organization	3	1	4
Zomi Congress for Democracy	2	2	4
Lisu National Development Party	2	0	2
Kachin State Democracy Party	1	0	1
Mon National Party	0	1	1
Wa Democratic Party	1	0	1
National Unity Party	0	1	1
Kokang Democracy and Unity Party	1	0	1
Independents	1	2	3
Vacant	7	0	7
TOTAL	440	224	664

Source: Than[216]
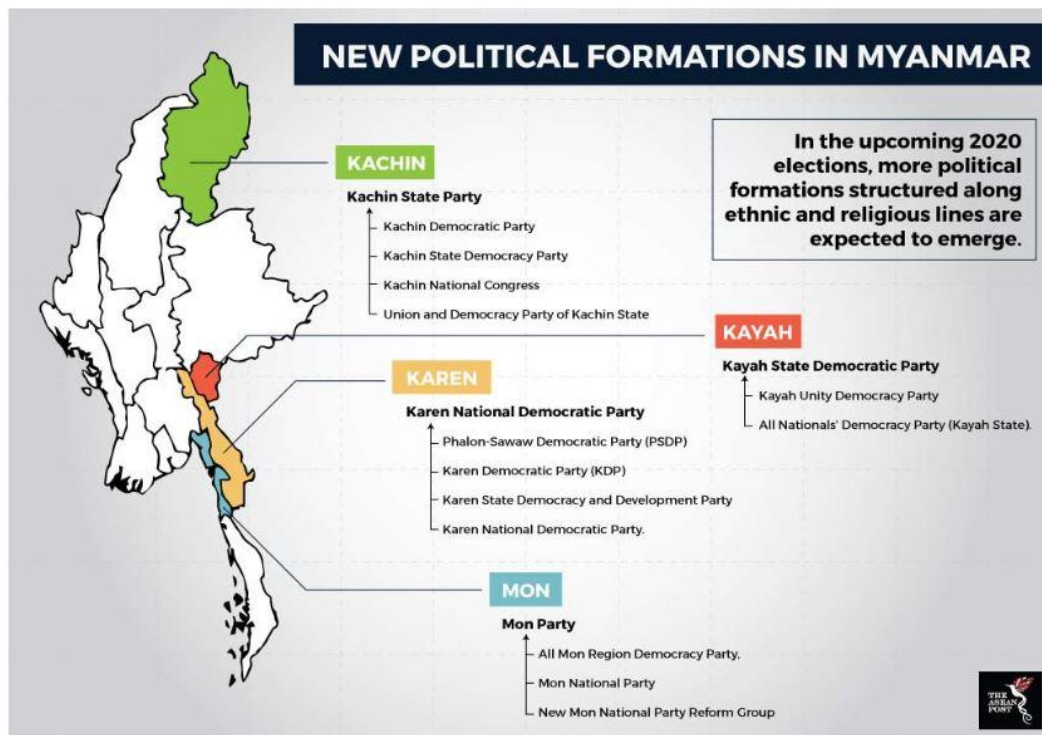
Source: Ariffin[217]

Annex 5: Additional Information on Cluster Analysis

The clusters are listed in the same order as they appeared in the above brief.

Governance:
- The NLD government has not been able to make substantive changes to laws regarding freedom of speech and assembly. Human Rights Watch has reported that there has been a decline in the freedom of press under the NLD government.
- Freedom of expression has been deteriorating.
- Domestic journalists are the most at risk and a climate of fear has been created.
- Certain topics are viewed as particularly risky to cover. According to journalist Aung Naing Soe, "Criticism of 'the Lady' [Aung San Suu Kyi], the military or the NLD can cause problems. According to numbers compiled by Athan, a local organization working to improve freedom of expression in Myanmar, at least 43 journalists had been arrested under the NLD-led government as of September 30, 2018."[218]
- The anti-corruption agency (ACA) reveals that the overall severe corruption assessment reflects systemic capacity weakness and the country's fragility.[219]
- The 2008 constitution remains an impediment to democratic changes as the military retains 25% of parliament's seats – they possess leverage over any constitutional change.
- The NLD has also been largely silent on the military's counterinsurgency campaigns. The government may understand the sensitivity needed to build trust with the Tatmadaw if they are to ever persuade the military leaders to relinquish some of their control.
- Aung San Suu Kyi has yet to confront or challenge the military on the Rohingya crisis given the political influence and support from the Bamar Buddhist base. She fears she will be seen as "pro-Muslim."[220]

Security and Crime:
- Since the 1950s, there has been ethno-nationalist insurgencies in Myanmar due to political exclusion in the creation of the union of Burma.[221] Warfare between EAOs and the Tatmadaw has resulted in human rights violations and large-scale displacement.
- Myanmar government has failed to protect victims or punish perpetrators, especially in instances of ethnic conflict - there are occurrences of severe violations of civil, political and social rights. Government forces are responsible for extra judicial killings, torture, sexual violence, destruction of property.[222]
- Initially, the NCA was welcomed by ethnic armed organizations since these non-state armed groups were able to keep their weapons, they were recognized as legal organizations and they were given the right to participate in the peace process as equal members.[223]
- Some non-signatory EAOs formed the Northern Alliance (KIA, MNDAA, TNLA and AA). Most recently, an alliance of 7 EAOs created the Federal Political Negotiation and Consultative Committee (FPNCC): UWSA, KIO/KIA, AA, PSLF/TNLA, SSPP/SSA-N, MNDAA and NDAA (see Annex 3).
- There are fundamental disagreements between the FPNCC and the government on the order of steps for the peace process that will continue to increase tensions and violence between EAOs and the Tatmadaw.[224]

- Both sides have laid blame on the other for delaying the peace process and implementation of the agreement,[225] fostering ongoing lack of trust between EAOs and the government.
- Tension and conflict between EAOs and the central government has emerged due to inequitable distribution of resources between centre/urban areas and resource rich periphery.[226]
- There has been no recognition of ethnic land rights which has contributed to violence and conflict between EAOs and the government. Laws (Farmland Law and the Vacant, Fallow and Virgin Lands Law) passed under Thein Sein government did not take into account existing land tenures nor did it recognize communal or customary lands. As a result, there has been land grabbing away from ethnic groups.[227]
- Fighting between Tatmadaw and EAOs in Rakhine and Chin states is expected to be ongoing for the rest of 2019.
- It is likely that there will be a protracted conflict between the military and AA as they were recently deemed to be terrorists and charged their leaders under national counter-terrorism laws. Intra-ethnic violence is also going to remain an issue in northern Shan State.[228]

Economic Development:
- 2018 was a difficult economic period for Myanmar in large part due to its government changing the months that constitute a fiscal year (FY). The old FY was from of April 1, 2017 to March 31, 2018, and the new one is October 1, 2018 to September 30, 2019.
- FDI is concentrated mostly in the oil and gas sector, followed by transport and communication, manufacturing, and real estate.[229]
- The past year has seen a decrease in FDI due to slowing global and regional growth, global trade tensions, and insecurity in border areas. To counter this, the government introduced measures such as forming a new ministry for investment and foreign economic relations[230].
- Black market: They contribute to illegal channels of trade for drugs and other products.[231] For example, China's high tariff rates and import quotas on rice and corn drive illegal exports of these products into China through particular land borders.[232]
- Many parts of the country experience regular blackouts, suggesting that energy infrastructure and electricity access are areas that need immense improvement.[233]
- Myanmar's economy is susceptible to external shocks, exacerbated by enduring conflicts and governance challenges. Dependence on natural resource revenues, vulnerability to natural disasters, and a limited financial sector are all factors that may increase fragility.
- In 2018, the Ministry of Planning and Finance published the Myanmar Sustainable Development Plan (2018-2030). The government's master plan for the development of the country provides a framework for coordination and cooperation across all ministries, states and regions.[234]
- There is a great rural/urban divide in Myanmar. Economic benefits are concentrated on urban areas and central regions, whereas rural areas are experiencing lower and less sustainable growth reliant on natural resource extraction.
- Stark variations in the overall degree and types of disadvantages among states and regions in Myanmar remain. Overall, rural populations are more than twice as likely as urban populations to experience multiple disadvantages.[235]

Environment:

- Cyclones and flooding during the monsoon season are the biggest environmental threats in Myanmar that could influence the country's fragility.
- Deforestation: the forest has been declining at a rate of 1.2 percent per year.
- There has been an overexploitation of fish stocks which has declined its fish resources.
- The country's heavy reliance on natural resource extraction for economic growth has caused environmental issues to emerge.[236]
- Air pollution is estimated to have contributed to 45,000 deaths in 2017. This is a particular risk for youth aged 5-14, affecting malnutrition and behaviour risks.
- Inadequate sanitation and water treatment are leading contributors to disease.
- The country must ensure that new investments being made in the country are low carbon and climate resilient.
- A weak governance structure, lack of capacity, lack of strong institutions, and lack of resources can make it difficult to implement these policies and have strong adaptation measures in the wake of climate emergencies. Non-state actors may have a role. There are many international development organizations working with communities across the country on environmental issues.[237]
- Implementing the National Environmental Policy: The Government of Myanmar plans to implement this policy through a strategic framework that applies to principal areas and sectors. It provides these sectors with environmental governance requirements in institutional strengthening, monitoring and enforcement, public participation, dispute resolution, and financing.[238]
- Implementing the Myanmar Climate Change Policy: The Government of Myanmar plans to implement this policy through 1) laws, regulations, strategies, and action plans; 2) strengthening institutions; 3) allocating appropriate funds into adaptation and mitigation strategies; 4) capacity building; 5) research and technology; and 6) partnerships.[239]
- Although these policies are a good first step, what remains a risk is the government's ability to properly implement them with the appropriate resources and capacity.

Demography and Population:

- There has been an ongoing upsurge of extreme Buddhist nationalism since political liberalization in 2011.
- Demographic fears, economic and cultural anxieties and regional dynamics have contributed to the shared pervasive sense of angst and threats of the Buddhist community.
- Tensions are stoked when religious nationalist blame other religious minority groups for local incidents such as conflicts over land, animal slaughter, domestic abuse, rape.[240]
- A strategy of institutionalized discrimination of the Rohingya was enacted through the 2014 census where they could only be registered as Bengali. If they chose not to register, they were considered to be undocumented.[241]
- Migration in Myanmar is driven by counterinsurgency of ethnic armed organizations and state armed forces. There is a lack of institutionalized protection which forces populations to look for more stable livelihoods and access to services.[242]
- Migration can also be motivated by economic reasons – to find a job or in response to economic shocks individuals have faced.[243]
- Since political liberalization there has been an increase in labour migration, therefore remittances are playing a larger role in Myanmar's economy.

- Individuals are primarily migrating to Thailand and Malaysia. There is also a significant portion of Rohingya migrants who work in Saudi Arabia.
- There can also be significant migration due to natural disasters. Cyclone Nargis in 2008 resulted in the internal displacement of 2.25 million people.[244]
- Rural-urban migration can also have long term social and economic consequences in rural areas due to young people leaving their villages.[245] Citizens in rural areas are also displaced indirectly and directly by commercial and military development projects.[246]

Annex 6: Map of Myanmar

The following map demonstrates the location of major ethnic groups in Myanmar.
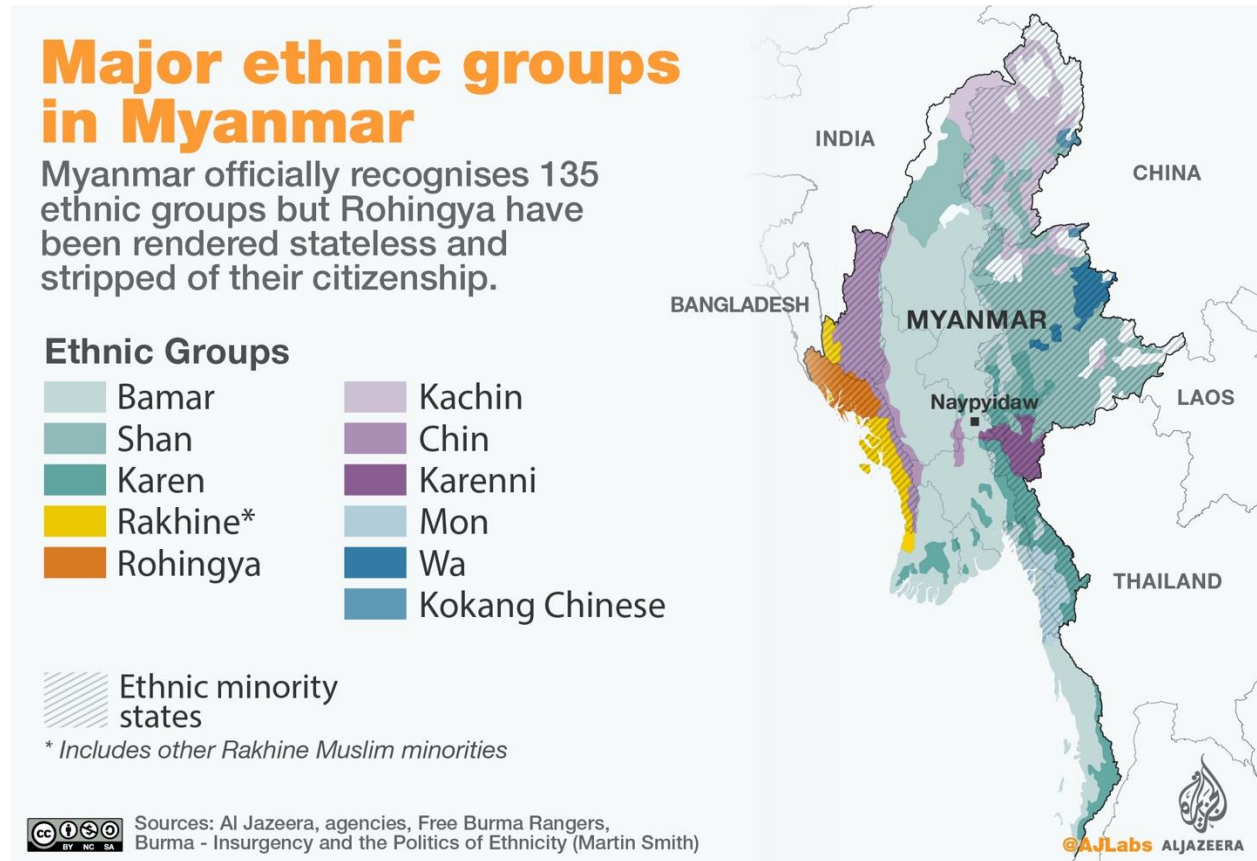
Source: Aljazeera[247]

Annex 7: EAO Networks and Map
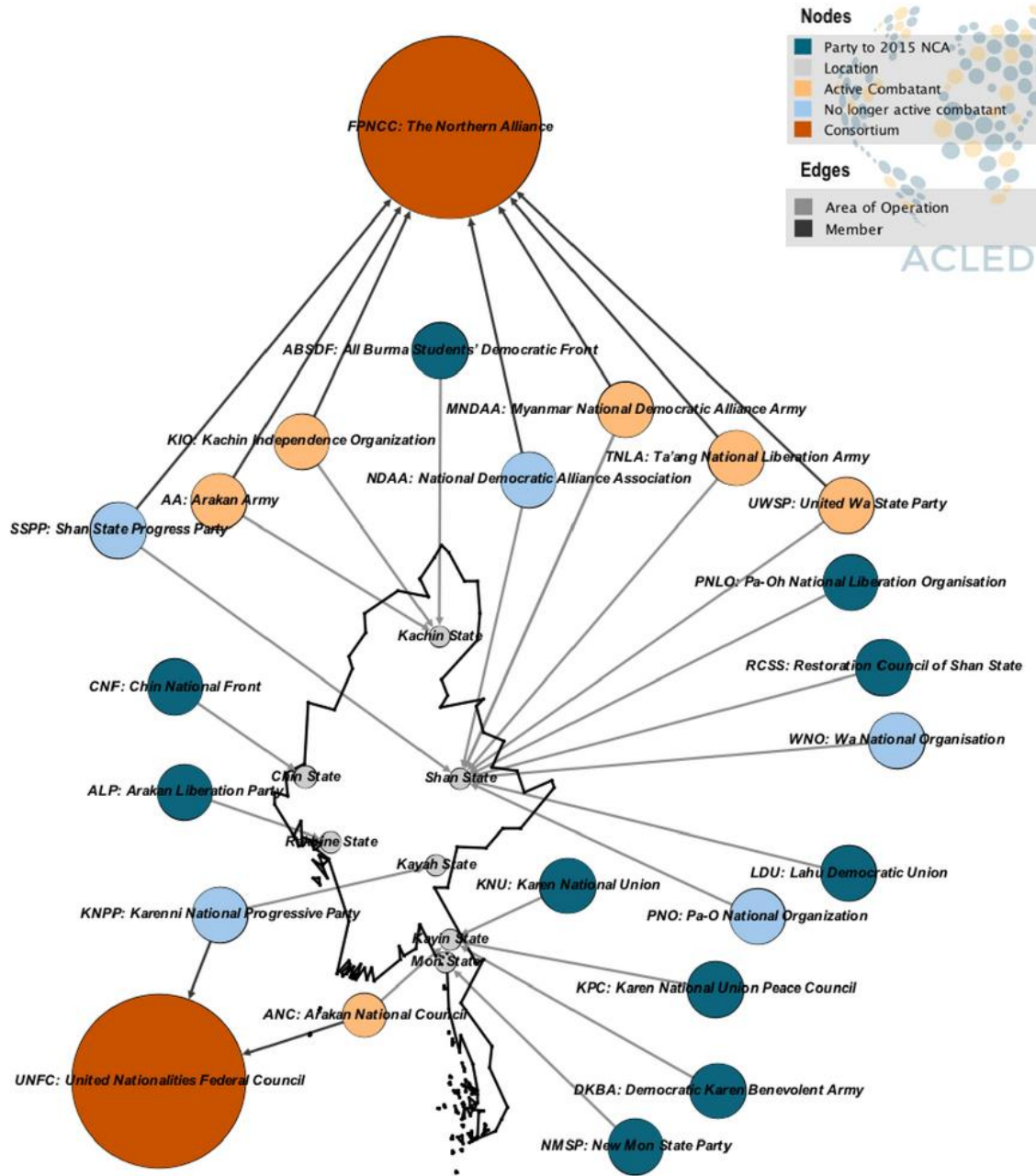
Source: ACLED[248]

Annex 8: Forest and Land Use

Forest and land use, 2017
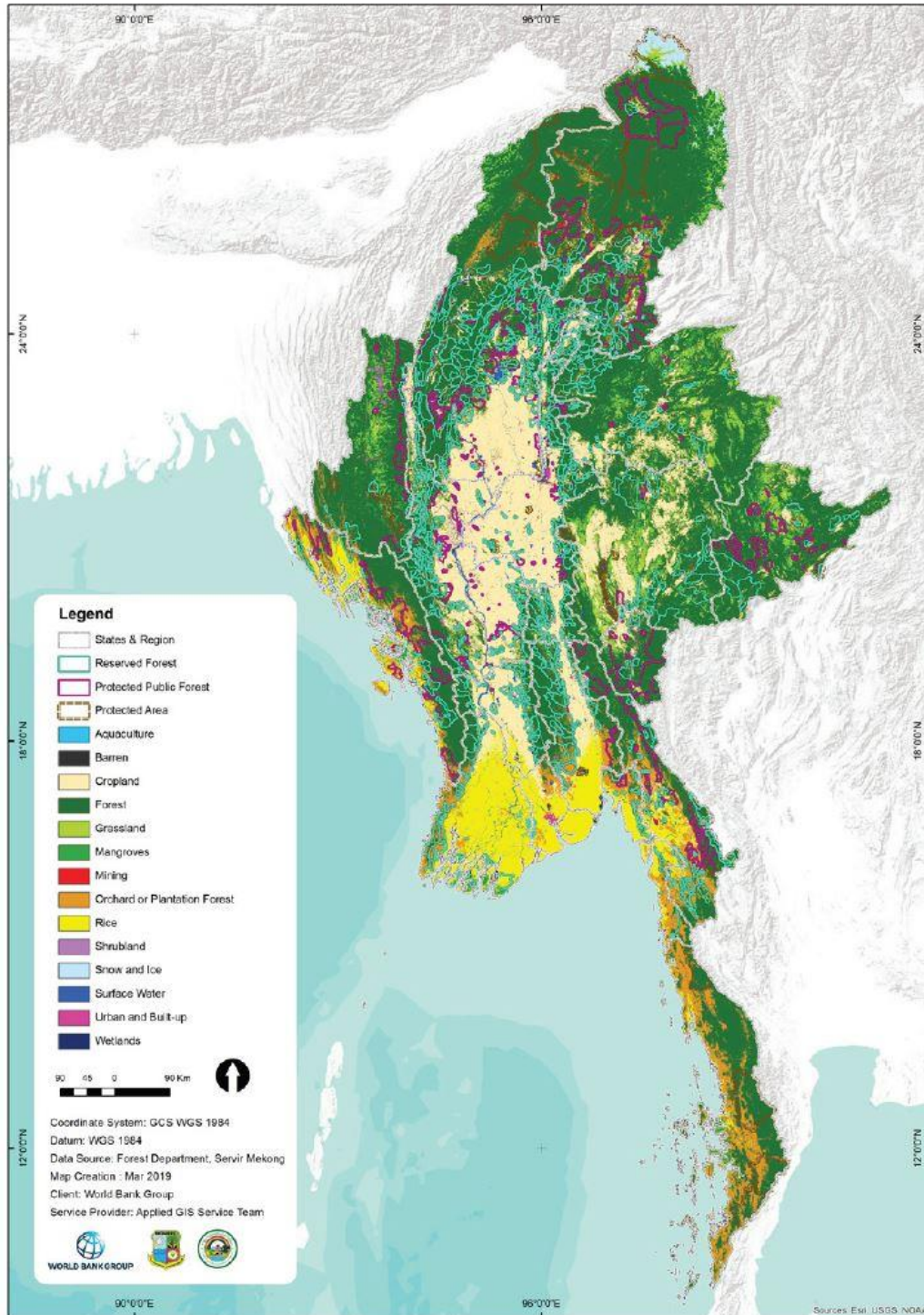
Source: SERVIR-Mekong 2017.
Source: The World Bank[249]

Annex 9: FDI 2010-2019
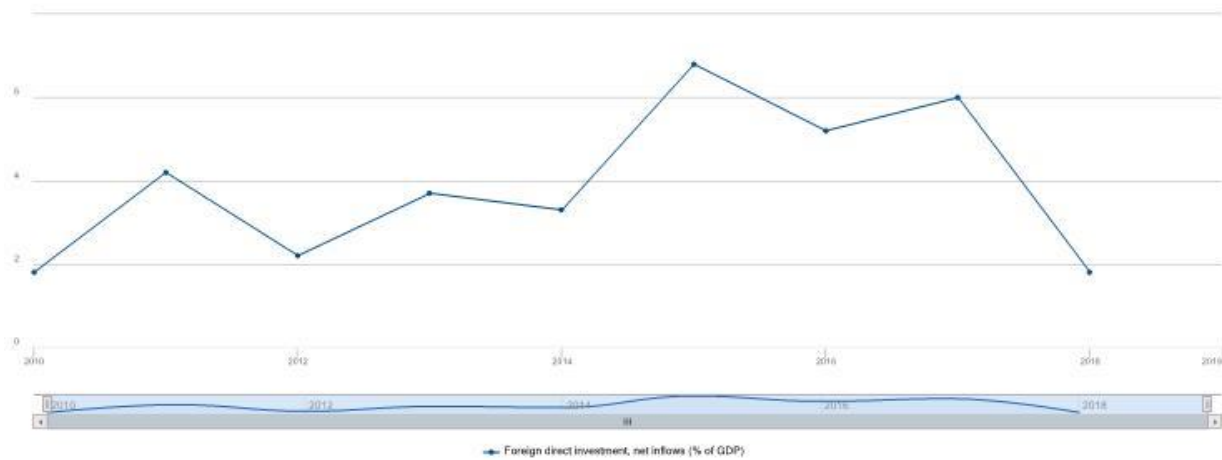
Country : Myanmar
Source: World Development Indicators
Created on: 11/25/2019

Source: The World Bank[250]

As mentioned above, the 2018 decrease in FDI is due to Myanmar's changing of the months that constitute a fiscal year, not necessarily indicative of a lower FDI.

MYANMAR

Most likely to see expanded ethnic armed conflict

THE CONFLICT SO FAR IN 2019

802
total political violence and protest events so far in 2019.

965
total reported fatalities from political violence and protests so far in 2019.

150 distinct locations of disorder in 2019.

16 distinct non-state conflict actors in 2019.

While the unilateral ceasefire declared by the Myanmar military at the end of 2018 has led to fewer battles in Kachin and northern Shan states, violence has significantly increased in northern Rakhine state and southern Chin state in the first half of 2019. The majority of the violence in the region stems from ongoing clashes between the military and Arakan Army (AA).

- Battles
- Explosions/Remote violence
- Protests
- Riots
- Violence against civilians

STATES HAD DIFFERENT CONFLICT LEVELS IN 2019

Year
2019 so far
2018

Number of Battles

BATTLES PRIMARILY BETWEEN STATE AND NON-STATE ACTORS

89%
Battles between state forces and EAOs or other non-state actors

11% Battles between non-state actors

Source: ACLED[251]

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