



USAID/BURMA MONTHLY ATMOSPHERIC REPORT: December 2018

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Acknowledgement

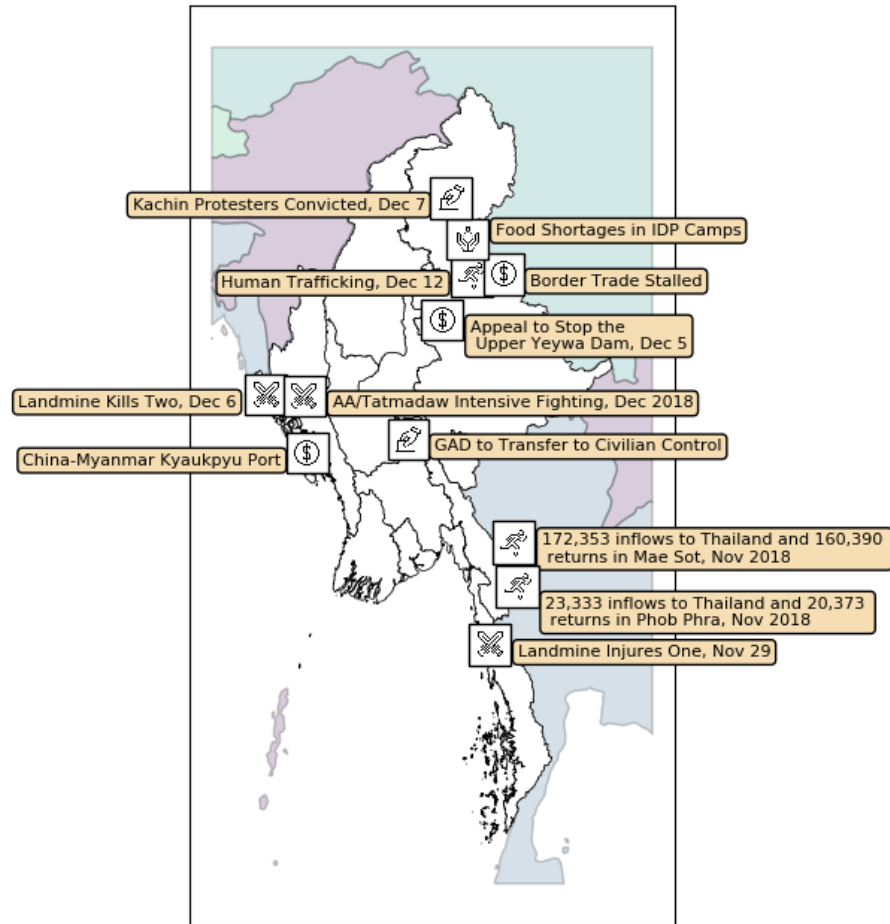
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DECEMBER 2018 AT A GLANCE

The Tatmadaw announced a four-month ceasefire in north and northeastern Myanmar. The announcement was made on December 20 one week after the Northern Alliance announced that they would be willing to enter into peace talks with the Tatmadaw. China is brokering the peace talks between the Tatmadaw and armed organizations in north and northeastern Myanmar.

Heavy fighting in Rakhine State between the Tatmadaw and Arakan Army. Beginning in late November, fighting between the Arakan Army (AA) and the Tatmadaw continued throughout the month of December. The Tatmadaw did not include Rakhine State in its four-month ceasefire, indicating that fighting, which has a huge impact on Rakhine residents, will continue.

Director General U Zaw Htay announced that the General Administration Department will transfer from military to civilian control. The General Administration Department (GAD), which manages the country's public administrative structures and is one of the most prevalent organization in the country, will be transferred from the Ministry of Home Affairs to the Office of the Union Government.



Concerned about the China-Myanmar Kyaukyu Port, India continues to strengthen ties with Myanmar. In a joint statement issued this month, India pledged continued assistance to Myanmar in capacity building and technical assistance in agriculture, business, security, infrastructure and human resources, noting the potential for further growth in bilateral trade and investment.

The World Bank and the International Monetary Fund lower their projections for Myanmar GDP growth. The World Bank lowered their growth projects for 2018-19 to 6.2 percent down from 6.8 percent, while the International Monetary Fund (IMF) lowered their prediction from 7.0 percent to 6.4 percent.

Internally displaced persons living in camps in Kachin face food shortages. Humanitarian organizations report difficulties in transporting the food from China into camps located in areas under control of Kachin Independence Army, creating food insecurity in at least 30 camps.

CONFLICT AND STABILIZATION

On December 20, the Tatmadaw initiated a four-month ceasefire in north and northeastern Myanmar. Analysts are optimistic that this could be a considerable step forward in the peace process although some worry that the Tatmadaw will use this time to strengthen its position once the ceasefire ends in April and that fighting will renew. Considering the Tatmadaw’s repeated violations of the Nationwide Ceasefire Agreement (NCA), the unilateral ceasefire, if upheld, could help repair the Tatmadaw’s reputation within Myanmar and abroad and help build the trust needed for the peace process.ⁱ Of note, however, Rakhine State, where most of this month’s conflict occurred, was not included in the ceasefire.

Despite the ceasefire announcement, there were reports of fighting and protests throughout the country this month. A summary of conflict events between November 24 and December 15, 2018, as reported by the Armed Conflict Location and Event Data Project (ACLED) and other supplementary sources, follows. Figure 1 below shows all instances of conflict throughout Myanmar during this time period while Figure 2 at the end of this section shows the actors involved in the conflict.

RAKHINE

Rakhine State experienced renewed conflict after several relatively quiet months. Fighting between the Tatmadaw and the AA started in late November in Buthidaung Township. Within the first week of fighting, a total of 14 fatalities were reported.ⁱⁱ On December 18, the Tatmadaw’s air force attacked areas held by the AA in Kyauktaw Township. According to AA spokesperson Khaing Thukha, there were more than 40 clashes between the two groups in Buthidaung, Rathedaung, Ponnagyun, and Kyauktaw townships in northern Rakhine since November 29.ⁱⁱⁱ After one particular incident, a police officer was found dead along the Myanmar-Bangladesh border in Maungdaw Township, the “epicenter of violence in August

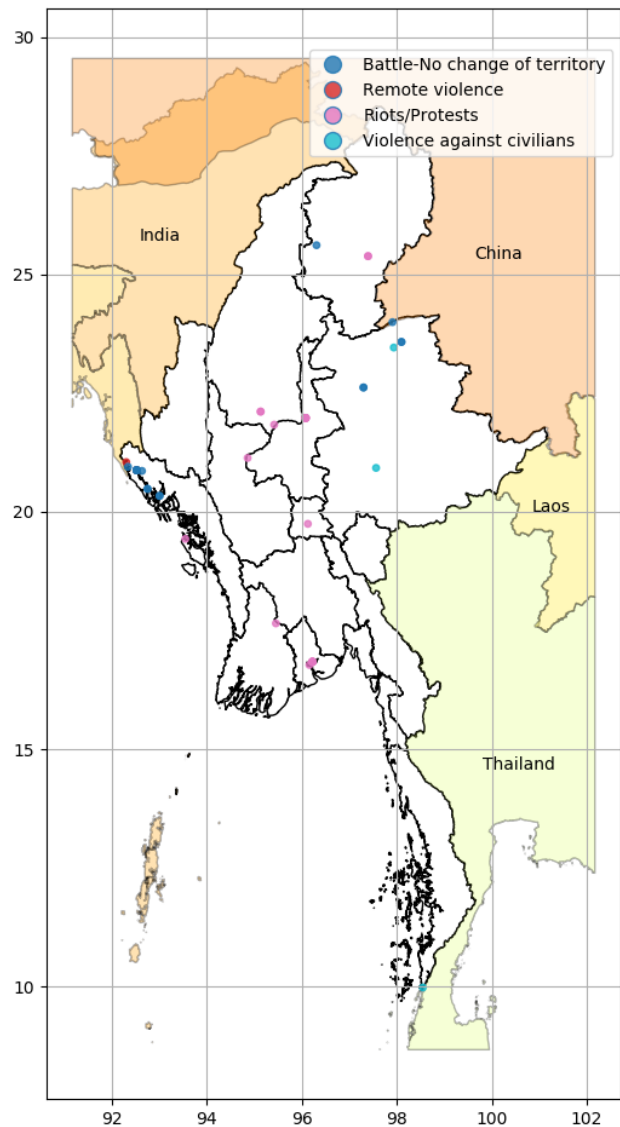


Figure 1. Conflict Hot Spot Map (Nov 24 – Dec 15 2018)
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2017.”^{iv} During another clash, on December 14, the Tatmadaw reportedly commandeered boats from Muslim and Arakanese civilian boats to transport troops along the Upper Sai Din River. AA soldiers shot at the boats, wounding one of the civilian boat drivers.^v

Conflict between the AA and the Tatmadaw continued through the month of December. The fighting often involved heavy shelling and forcibly displaced almost 600 civilians.^{vi} The air force attacks in Kyauktaw Township were particularly alarming for residents of the six villages in the area.^{vii} Over the last year, the Tatmadaw made efforts to improve its air force, but there are few confirmed reports of the Tatmadaw using aircraft to fight ethnic armed organizations (EAOs) this year.^{viii} The use of helicopters and

airplanes frightened the local residents who fled their villages when they heard the aircraft attacks.^x According to an article in *The Irrawaddy*, the Tatmadaw is suspected of using helicopter gunships in the area.^x Fighting is expected to continue. The renewed fighting between the Tatmadaw and the AA, which has directly affected civilians, adds additional stress to an area of the country still recovering from the violence against the Rohingya Muslims in Rakhine state last year.

In an interview with *The Irrawaddy*, a military officer suggested that the AA is working with the Arakan Rohingya Salvation Army (ARSA).^{xi} ARSA is considered by many to be a terrorist organization; it was attacks carried out by ARSA that sparked the brutal retaliation against Rohingya civilians in 2017. The notion that AA and ARSA are working together is one reason why the Rakhine may not have been included in the ceasefire called for by the Tatmadaw on December 21. This month's conflict, however, was sparked by the Tatmadaw's refusal to recognize the AA's claims to territory in Rakhine.^{xii}

KACHIN

There was little fighting in Kachin between the Kachin Independence Army (KIA) and the Tatmadaw this month with one fight breaking out between the two armies on December 3 in Hpakant Township.^{xiii} Information provided to Kimetrica from the field indicates that the Tatmadaw is employing techniques, including limiting international aid to IDPs living in KIA-controlled areas, in order to pressure the KIA into signing the NCA (see Social Issues section). It is possible that the Tatmadaw is trying to maintain a certain level of peace in the area as another technique to bring the KIA into the peace process.

SHAN

In Shan State, fighting between EAOs continued to plague the area this month. The SSA-S and SSA-N fought each other in Mongkaing and Namtu townships in late November, and the Restoration Council of Shan State (RCSS) and

Ta'ang Nationalities Liberation Army (TNLA) forces clashed multiple times this month. Pan Sok and Pan Kwet villagers fled their homes because of the fighting between the two EAOs.^{xiv} The RCSS also fought the Shan State Progress Party on December 10, forcing 100 villagers in Hsipaw Township to flee. The following day, the RCSS shot at villagers in Loilen Township.^{xv} Shan State is included in the Tatmadaw's ceasefire, but with most of the fighting occurring between EAOs, it remains to be seen if the ceasefire will have any impact on the level of fighting in Shan.

PROTESTS

Approximately 250 workers from Kyaik Sein shoe factory went on strike for five days in South Dagon Myothit in Yangon. On December 15, the factory employer and the striking workers reached an agreement over improvements to the work environment.^{xvi} This month in Sagaing Region, farmers protested the Great Wall Company's sale of subpar farming inputs. Also in Sagaing Region, villagers protested Chinese-owned Wanbao Company's copper mine for harming their farms with polluting acid vapor.^{xvii} On December 31, over 100 workers at a Chinese-owned garment factory in Yangon went on strike over the firing of seven co-workers.^{xviii} Poor working conditions as well as pollution and other negative externalities created by Chinese-owned companies that are based in Myanmar add to the tension between Myanmar and its powerful neighbor.

More than 600 war veterans held a pro-military rally in the Ayeyarwady Region in response to international sanctions on Myanmar. The Myanmar War Veterans Association (MWVA) organized the event. Protesters held signs stating, "We don't accept the biased report of UN's Fact-Finding Commission."^{xix} Senior General Min Aung Hlaing praised the MWVA for its rallies and called for more pro-military rallies last month.^{xx} These demonstrations are met with mixed reactions by other segments of Myanmar society, but they are unlikely to dissipate given the possibility of increased sanctions, the support and encouragement that protest organizers receive from the Tatmadaw, and with Myanmar's

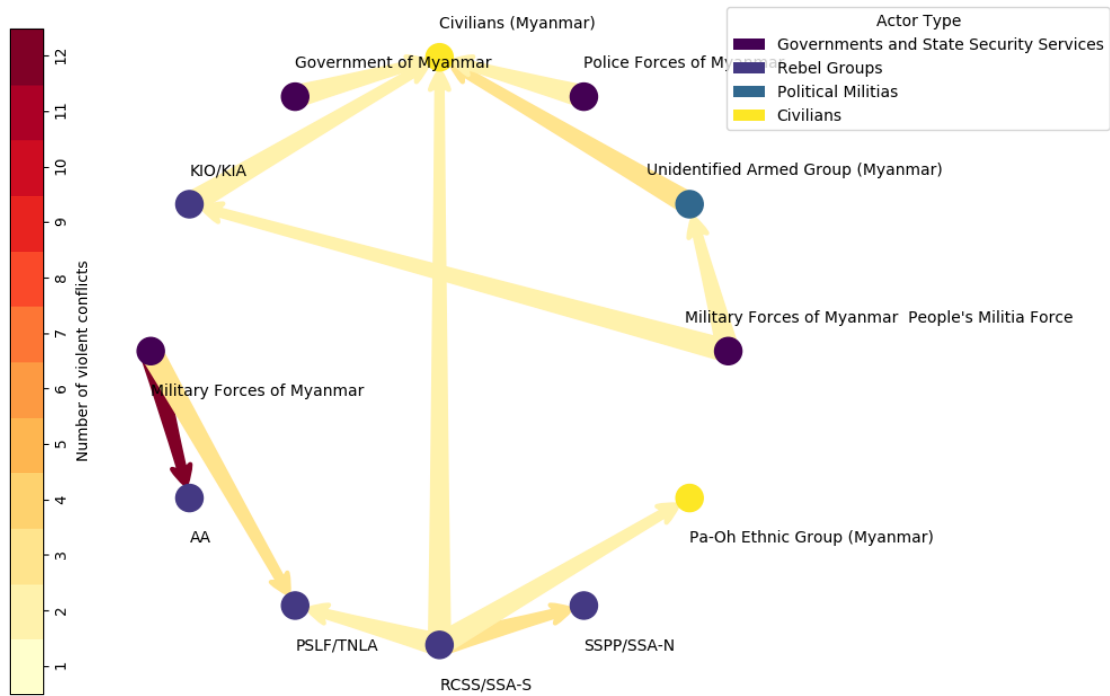


Figure 2. Myanmar Violent Conflict Actors, Nov 24 – Dec 15, 2018
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legacy of militarization and internal conflict, veterans constitute an outsized segment of society.^{xxi}

LANDMINES

There were three reports of explosions injuring civilians between November 24 and December 15. A villager in Yebyu Township, Tanintharyi Region, was injured in a landmine explosion on November 29. On December 6 in Buthidaung Township, Rakhine State, where much of the fighting between the AA and the Tatmadaw occurred this month, a landmine explosion killed two civilians. Two villagers were injured by a handmade bomb in Maungdaw while fishing on December 10.^{xxii} Landmines and other explosive devices pose a significant risk for the people of Myanmar. According to a recent report by the International Campaign to Ban Landmines, there is no systematic effort by the Myanmar government to clear landmines. Shan, Kachin, and areas in Chin and Sagaing along the Indian border are each reported to be heavily mined.^{xxiii}

POLITICS

The Tatmadaw’s unexpected announcement of a unilateral ceasefire in northern and northeastern regions of Myanmar provide fresh impetus for the possibility of a breakthrough in the peace

talks. The move by the military coincides with the announcement by the Peace Commission that three EAOs—including, remarkably, the AA, Myanmar National Democratic Alliance Army (MNDAA) and TNLA—would enter formal negotiations with the military. China has been brokering informal peace negotiations since at least September 2018. With the peace process previously gridlocked, and NLD largely blamed for weak leadership on this front, the government will hope to capitalize on December’s developments to achieve additional progress in the peace process.

A surprise December 21 announcement that the GAD will transfer from military to civilian control under the Ministry of the Office of the Union Government will also be a welcome boost for the NLD, though it will also challenge its capacity to effectively govern. As the military relinquishes control of one of the state’s most influential and sprawling departments, the NLD will now assume authority over one of the core functions of government administration, while the military’s presence in each township and in local affairs should theoretically wane. Implications are discussed in more detail, below.

PEACE PROCESS

No new rounds of formal peace talks were held in December, though informal talks between the

government and three armed groups resulted in the announcement of a four-month ceasefire. In Kunming, Yunnan Province, China facilitated meetings between Myanmar's Peace Commission and the AA, the MNDAA, and the TNLA. All three EAOs are part of the Northern Alliance and declared that they "desire to solve the ongoing war, conflict and political problems through negotiations."^{xxiv} The Tatmadaw showed its willingness to negotiate with a four-month ceasefire although, by leaving Rakhine State out of the ceasefire orders, it effectively excluded the AA from the peace talks.

The government welcomed the move by the Tatmadaw and EAOs to initiate a ceasefire, stating its intention to continue talks to establish bilateral ceasefire agreements. As reported in the conflict section of this report, both the AA and TNLA recently clashed with the Tatmadaw. Observers are cautiously optimistic about what the ceasefire means for the peace process, but caution that peace may not last beyond the four months, particularly because the Tatmadaw has demonstrated its reluctance to begin formal talks with these same groups previously.^{xxv} The Peace Commission's inclusion of the three groups into the formal peace process may have been driven by the stated preference of other EAOs to include more parties into the peace talks, or as a way to bring other members of the Federal Political Negotiation and Consultative Committee (FPNCC) into negotiations.^{xxvi}

One of the most influential members of the FPNCC is the KIA, which is also part of the Northern Alliance. In an interview with a de-identified individual with special knowledge of the different parties, he suggested that the Northern Alliance is backed and influenced by China, which plays an active role in the peace process. China, according to the informant, applies indirect pressure on the KIA and the ethnic-politico organization Kachin Independence Organisation to sign the NCA. China's desire to attain stability and peace in the region is, at least partially, driven by its business interests in Kachin State. Regardless of their ultimate aims, Chinese leaders desire peace in the area, though their actions may appear

contradictory at times, which is partly examined in the Social Section.

EXTERNAL RELATIONS

INDIA

The president of India, Ram Nath Kovind, embarked on a 5-day visit to Myanmar on December 10. The visit was only announced days before and, according to Indian political observers, was potentially triggered by the Myanmar-China Kyaukpyu Port agreement.^{xxvii} The Government of India is reportedly very concerned about the development of Kyaukpyu Special Economic Zone, regarding the port agreement as a greater security threat than the China-developed Gwadar port in Pakistan and part of a larger encirclement of its offshore territory by Chinese-run ports and investments.^{xxviii}

India fears that Kyaukpyu Port, although ostensibly a commercial port, could facilitate yet greater Chinese naval presence in the Bay of Bengal and Indian Ocean.^{xxix} Indian leaders refer to the network of Chinese commercial and military facilities throughout the Indian Ocean as the "String of Pearls," of which Kyaukpyu in Myanmar is the latest addition.^{xxx} Myanmar is also of geo-strategic significance to India, as it connects India to the ASEAN region, the core of its landmark Act East policy. It is against this backdrop that India seeks closer political, economic, and security ties with Myanmar.

The lengthy joint statement issued after the state visit highlighted India's extensive involvement in Myanmar, listing the agreed deals and projects between the two countries.^{xxxi} As highlighted in last month's atmospheric report, India committed to assisting the repatriation of the Rohingya refugees. The country also invested USD 25 million into the Rakhine State Development Programme and, as part of the state visit, provided Myanmar with the first 50 prefabricated houses for displaced persons. Also regarding Rakhine, India and Myanmar signed a memorandum of understanding to appoint a port operator for the Kaladan Multi Modal Transit Transport Project and agreed on surrounding infrastructure. Other topics discussed during the

state visit included border crossings, bilateral trade and investment, the energy sector, bilateral cooperation on security, and agricultural sector technical assistance.^{xxxii} The cooperation on various levels demonstrates India's commitment to strengthening its ties with Myanmar, as well as its anxiety over China's regional dominance. Myanmar naturally seeks to exploit its favorable geography, located between two of the world's largest economies. In particular, the Myanmar government, in line with its independent and non-aligned foreign policy, could balance its perceived dependency on China by leaning more towards its neighbor to the West.

UNITED STATES

On December 13, the United States House of Representatives passed a resolution declaring the crimes committed by the Myanmar government against the Rohingya as genocide. The resolution overwhelmingly passed with a bipartisan vote of 394 to 1.^{xxxiii} The vote is a notable signal to the US State Department, which has yet to formally label the atrocities as genocide. The State Department released a document in September which found "extreme, large-scale, widespread violence seemingly geared toward both terrorizing the population and driving out the Rohingya residents."^{xxxiv} According to anonymous interviews with the Washington Post, the State Department was ready to label the events as "crimes against humanity" and to act upon these findings accordingly, however ultimately decided against it.^{xxxv} Whether the resolution will have a substantive effect on Myanmar or Tatmadaw leaders is less clear, and is presently seen as more of an internal rebuke of the State Department by Congress.

EUROPEAN UNION

On December 10, the European Council adopted conclusions on the situation in Myanmar. A statement released by the Council declared that the Council intends to adopt additional restrictive measures against senior military and border guard police officers responsible for human rights violations.^{xxxvi} The statement affirmed the Council's intention to explore possibilities for expanding the scope of

restrictive measures to also include entities. This most likely refers to potential sanctions on companies and organizations associated with the Tatmadaw. The Council also proposed a new independent mechanism to investigate and prosecute those responsible for the atrocities to be aligned with and fully recognize the jurisdiction of the International Criminal Court.

Meanwhile, several organizations in Myanmar joined forces to appeal to the EU to refrain from withdrawing from the Everything But Arms (EBA) trade agreement. The Union of Myanmar Federation of Chambers of Commerce and Industry, Confederation of Trade Unions of Myanmar, and Myanmar Infrastructure, Craft and Service drafted a joint letter urging the EU not to harm Myanmar's labor market and jeopardize the job security of the 1,100,000 workers active in the garment and fishery sector.^{xxxvii} There was no official response before this report's publication.

GENERAL ADMINISTRATION DEPARTMENT

Presidential spokesperson, Director General U Zaw Htay, announced that the government plans to transfer the GAD from the Ministry of Home Affairs to the Ministry of the Office of the Union Government.^{xxxviii} This transfer means that one of the most sprawling government organizations will move from military to civilian control.^{xxxix} The switch was agreed in principle by both military and government leaders. Former deputy minister of the President's Office and retired colonel, U Min Thu, was nominated as Minister of the Office of the Union Government with the expectation that he would oversee GAD.^{xl}

The presidential spokesperson attributed the timing of the GAD transfer announcement to U Min Thu's appointment. The transfer of the GAD to civilian control, however, reduces military oversight of one of the most consequential administrative elements of government, with a presence, and key role in civil service, in villages throughout the country. The change ostensibly reflects part of the larger, promised reform process, but the military's willingness to release

its authority over GAD is still a surprise. The change could on the one hand bring the Tatmadaw increasingly under civilian control, and possibly enhance transparency and oversight of local governance including tax receipts. On the other it will push an already inexperienced NLD administration to conduct effective state administration, opening it up to criticism if it fails to rise to the challenge. The USDP, meanwhile, expressed its reservations, wondering aloud if the intentions were to circumscribe military power, and whether the NLD could use the change to influence elections, though no timetable for a formal handover has been decided.^{xli}

LAND

On December 16, the Kayin National Union (KNU) called for the abolition of the newly-amended Vacant, Fallow and Virgin Lands Management Law (VFV), joining a chorus of other civil society organizations (CSOs) who opposed the introduction of the law. Opponents cite concerns that the law could facilitate land dispossession, and contravenes both the peace process and the NCA.^{xlii} VFV, which was originally introduced by Thein Sein's government in 2012, but which was amended by the NLD-led government in September 2018, requires all occupiers of VFV land to apply for a land permit or face evictions or penalties of up to two years of imprisonment and/or a fine of MMK 500,000.^{xliii} The government issued a notice on October 30 stating that land users had six months to register their land.

The law faces backlash from CSOs as it undermines customary systems of land tenure which are still practiced amongst many ethnic groups in Myanmar. Eighty-two percent of land that is formally classified as vacant, fallow or virgin is located in ethnic states.^{xliv} The law classifies a third of the country's total land as unused when much of it is, in fact, used by local communities in accordance with customary law for agriculture or subsistence. As a result, there is widespread fear among ethnic communities that VFV is being employed by the government to legitimize land grabs and dispossess rural

smallholders, in order to allocate land to domestic and foreign investors alike, including for Chinese interests.^{xlv}

The implementation of the law also raised concerns over its impact on the NCA and peace talks. Although the NCA stipulates that ethnic groups retain authority over issues related to the distribution of land within their regions, VFV is seen as an attempt by the national government to disregard the federal constitution and impose its own national land law thereby further undermining state autonomy—a touchstone of ethnic grievances and a key demand in peace talks.^{xlvi} KNU had already announced its suspension from peace talks, citing frustration with the government and Tatmadaw's reluctance to engage with EAO demands. VFV could further inflame tensions between ethnic groups and the state, even as progress is made on other fronts. As it stands, the deadline for land registration is March 11.

CORRUPTION WATCH

On December 7, President U Win Myint approved the creation of corruption prevention units (CPUs) within government departments.^{xlvii} CPUs are to be established by the Anti-Corruption Commission (ACC) and will be tasked with conducting corruption risk assessments and monitoring corruption inside government departments. The establishment of the CPUs is part of the expansion of the ACC, which has launched an initiative to increase its staff force and open branch offices in Yangon and Mandalay.^{xlviii} Additionally, an amendment to the Anti-Corruption Law will give ACC a mandate to investigate civil servants on its own accord. No amendment, however, has been made to the military's immunity from prosecution by the commission, which prevents the ACC from investigating the military, its three key ministries and key businesses. ACC expansion may reflect an NLD attempt to appear strong on the issue of corruption ahead of 2020 elections. Focus group discussions conducted by Mekong Economics with young people aged 20-25 suggests a common perception that the party is failing to effectively handle corruption while in office.

THE ECONOMY

December’s economic events suggest weakening resilience of Myanmar’s economy in the face of domestic and global headwinds. Although domestic consumers experienced a welcome boost from the declining price of fuel and stable prices of other consumer goods, the depreciating kyat continues to be a concern for the NLD government—the World Bank’s biannual *Myanmar Economic Monitor* reports that inflation will significantly increase over the 2018-19 financial year. The report, together with revised forecasts by the IMF and a survey released by EuroCham, highlight decreasing external confidence in Myanmar’s economy. European businesses cite concerns over the business environment under the current government, stemming from continued economic nationalism and a weak regulatory environment.

Likely to be of particular concern to the government, is the sliding trade volume at the Muse border. With over half of Myanmar’s total trade with China transiting through Muse, the forceful crackdown on exports has the potential to significantly harm local traders and Myanmar’s economy at large. As the trade freeze, which was directly ordered from the Chinese President’s office rather than the provincial authorities, stretches into its third month, the need for Myanmar trade officials to directly engage with Chinese counterparts is pressing. At the same time, China possesses significant leverage over

Myanmar’s economy, and thus politics. A “Dirty List” of foreign companies with business links to the Tatmadaw demonstrates the extent of informal, but substantive, Chinese influence in Myanmar domestic affairs.

PRICES

Fuel prices continued to decrease in December, with Octane 95 dropping from MMK 945 at the end of November to MMK 800 at the end of December, and the price of diesel declining from MMK 1,025 to MMK 900. Fuel prices have declined as a result of the cooling of the trade war between the US and China, which instilled more confidence in markets and caused the kyat to appreciate slightly against the dollar.^{xlix} Experts predict that the decline in fuel prices could proceed for several months although they also pointed to potential volatility in the oil market in the year ahead, with many uncertainties in the global economy such as production cuts by OPEC and ongoing disputes between the US and China. Rice prices were stable this month, with Ei Ma Tha rice maintaining a price of MMK 21,000 per 1.5 tin (approximately USD 13.38 per 61.37 liters) throughout the month, as of December 27, although the lesser used Paw San rice did increase in price, while the prices for different varieties of beans experienced only small fluctuations.

The dollar-kyat exchange remained mostly stable in the month of December with the Central Bank of Myanmar (CBM) rate only slightly depreciating

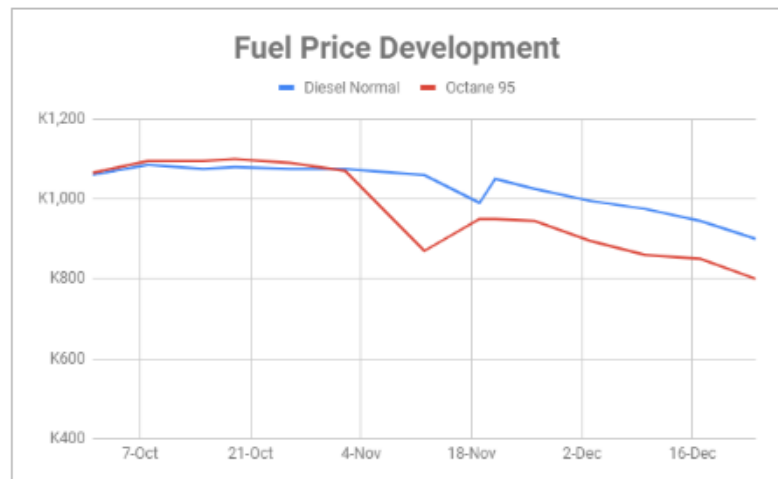
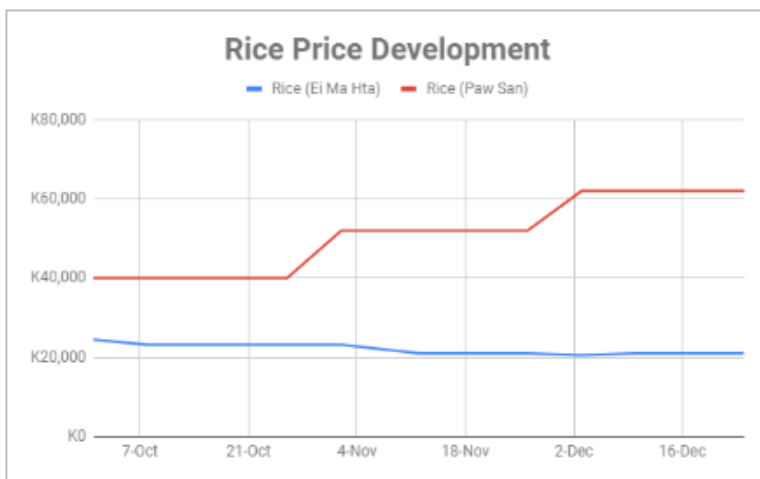


Figure 3. Rice and Fuel Prices (October – December 2018)
MEKONG ECONOMICS

from 1,573 at the start of the month to 1,566 as of December 26. Data collected by Mekong Economics suggests only a slight variation between the official CBM exchange rate and the informal and black market rates. Although there was little difference in the exchange rate between the start and end of the month, both the informal and black market exchange rates experienced a significant drop on December 4 before gradually returning to their previous rates. The informal rate slumped from MMK 1,569 per 1 USD on November 30 to MMK 1,516 on December 4. At this time, the black market rate declined from MMK 1,576 to MMK 1,517.

The Central Bank denied claims that it engineered the depreciation of the kyat by purchasing over USD 30 million from private banks to strengthen the dollar and benefit lenders. Vice Governor of the Central Bank, U Soe Thein, argued that, “The accusation that we intentionally bought US dollars to benefit banks is totally inaccurate.”ⁱ Myanmar’s public finances suffered as a result of the kyat’s depreciation against the dollar, with external debt reaching USD 10.2 billion this year, a total which secretary U Khin Maung Than claims is USD 819 million more than it otherwise would have been had exchange rates remained unchanged from the time the loans were issued.ⁱⁱ

EXPORTS

Myanmar’s trade with China continues to be negatively affected by the border crackdown in Muse, as outlined in November’s monthly report. In an attempt to stop illicit border trade between the two countries, China enforced strict rules on exports from Myanmar, confiscating illegal goods and imposing high tariffs on goods from Myanmar. According to Aung Than Oo, Vice-President of Myanmar Rice Federation, rice exports to China have more than halved from the same period last year, from 200,000 tons per month in late 2017 to roughly 90,000 tons per month.ⁱⁱⁱ

Accounts differ as to whether China has completely, or only partially, shut down trade at the Muse border. Although local merchants claim that no agro-goods, such as rice, sugar and corn, have been allowed through the border, the Ministry of Commerce released figures highlighting only reduced trade at Muse. According to official statistics, Muse gate registered total trade of USD 649 million, (exports of USD 401 million) in October and November, 32 percent lower than the total trade of USD 957.4 million during the same period last year.ⁱⁱⁱ

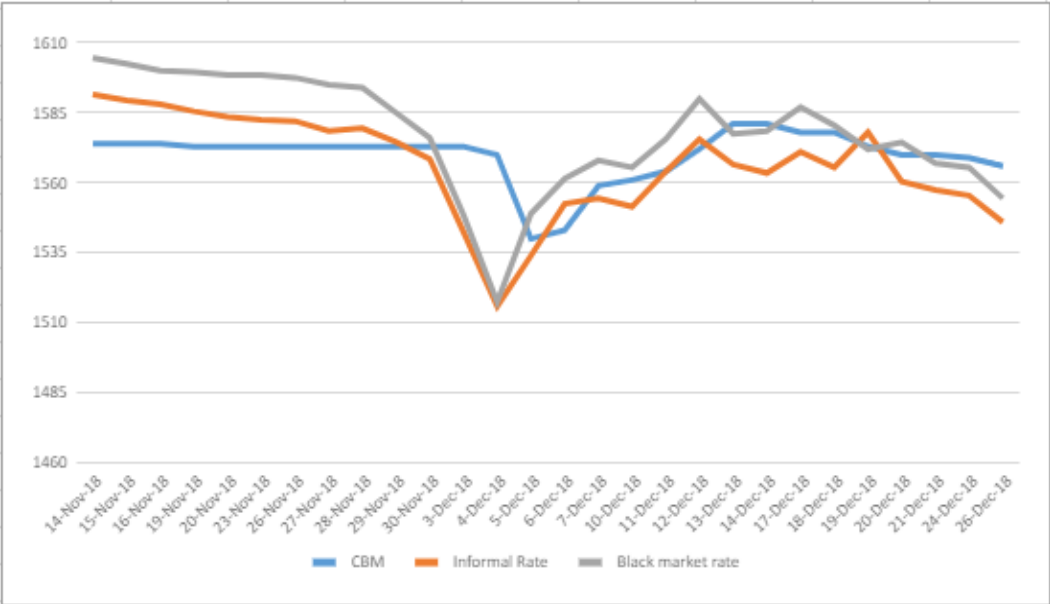


Figure 4. Kyat-Dollar Exchange Rates
MEKONG ECONOMICS

According to a local trader, the crackdown at the Muse border was issued from the central government of China rather than the Yunnan provincial authorities, after a state-owned enterprise lodged a complaint regarding illegal trade activities at the Muse border to the Chinese President’s office.^{lvii} The continued paralysis at the border may therefore continue for an extended period, with Chinese authorities strictly enforcing the President’s orders on trade. This development has the potential to severely damage Myanmar’s economy as a whole, and certainly Muse, as roughly three quarters of all Myanmar-China trade transits through the Muse crossing.^{lviii}

The Ministry of Commerce also released figures detailing Myanmar’s total external trade for the beginning of the 2018-19 fiscal year. Total external trade reached USD 5.51 billion during October and November 2018, a USD 354 million (7%) increase on the same period in the previous year. ^{lix}

GROWTH PROJECTIONS

On December 13, the World Bank released its biannual *Myanmar Economic Monitor* report, in which the World Bank revised its growth projections for the 2018-19 year to 6.2 percent, down from its previous prediction of 6.8 percent.^{lx} Although the report stressed that growth would remain robust in Myanmar, it also highlighted the challenges confronting the country’s economy with the depreciation of the

kyat expected to cause a notable increase in inflation over the financial year. The World Bank also pointed to a number of other factors which could contribute to slowing growth, including: the continued impact of the Rakhine crisis and possible withdrawal of Myanmar from the EBA agreement, weakened domestic demand, a decrease in investment, and government underspending, with allocations for capital projects going unused.^{lxi} On the same day, the IMF revised its growth forecast for Myanmar, predicting growth of 6.4 percent in 2018-19, down from its previous forecast of 7.0 percent. The IMF did, however, predict that the economy would improve next year as a result of higher fiscal spending and the implementation of the Myanmar Sustainable Development Plan.^{lxii}

BUSINESS CONFIDENCE SURVEY

A survey among European companies active in Myanmar highlighted decreasing business confidence. The Business Confidence Survey, released by the European Chamber of Commerce in Myanmar on December 11, provides key insights into the business environment of Myanmar, as experienced by European companies.^{lxiii} The report illustrates increasing skepticism over the country’s economy with 81 percent of the surveyed companies rating Myanmar’s business environment as “poor” or “needs

DOCUMENT OF THE MONTH

On December 10, Burma Campaign UK, a London-based NGO, published a ‘Dirty List’ of 49 international companies that either do business with the military or are involved in projects where there are human rights violations or environmental destruction.^{lv} The organization first published a list of companies allegedly supporting Myanmar’s military dictatorship, either indirectly or directly, back in 2002.^{lv} The criteria for being on the list include: supplying the military with goods, including arms, or other services, doing business with the military and/or military owned companies, having operations in Myanmar linked to human rights violations (i.e. dams and mines), and/or having operations linked to environmental destruction such as dams. Of note was the inclusion of Facebook, with Burma Campaign UK explaining that, “Its a platform to be used to incite hatred and violence [against] minorities in Burma, in particular the Rohingya Muslim minority and Muslims in general.”^{lvi}

Companies on the Dirty List are based in countries across the globe, with headquarters in each the US, Europe, Russia, India and Asia. China is home to the highest number of companies on the Dirty List with a total of 16 Chinese companies making the cut. Chinese companies are involved in a variety of activities in Myanmar including the supply of arms, machinery and warships to the Tatmadaw, and are extensively involved in hydropower dam projects. Figure 5 visualizes the country of origins of Dirty List companies and the activities in which they are engaged.

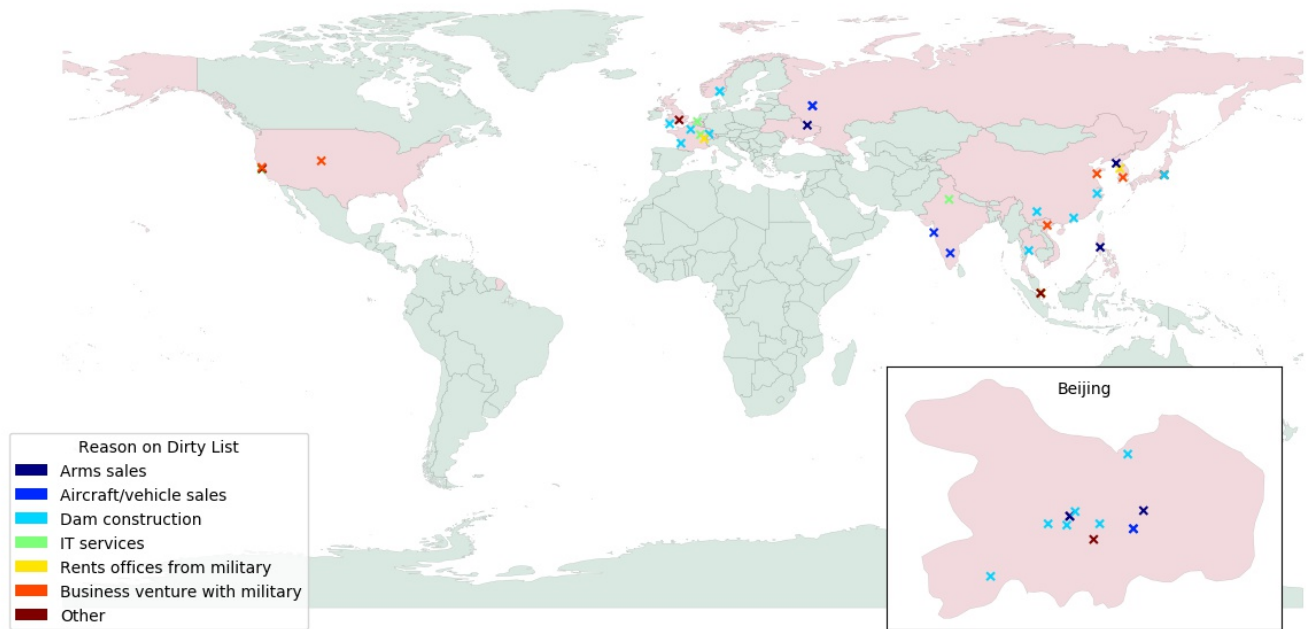


Figure 5. Burma Campaign UK's Dirty List
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improvement,” compared to 76 percent in 2017 and 67 percent in 2017. In a strong indictment of the NLD’s handling of the economy, almost half (45%) of respondents reported that in the past 12 months the overall business environment has either “decreased” or “greatly decreased.”

The report outlined the difficulties faced by European companies as a result of continued protectionism within some sectors of the economy. Forty-eight percent of respondents indicated that Myanmar’s economic nationalism had a negative impact on their business, caused poor implementation of the regulatory framework and created legal uncertainty and a lack of skills in the labor market.^{lxiv} Despite the issues raised by the report, the survey did reveal broad optimism among European companies operating in Myanmar, with 73 percent responding that they expected to provide more services in the coming three years, although this figure is 12 percent lower than in 2017.

In response to the survey, government officials underscored existing reforms implemented to solve existing regulatory gaps. U Aung Naing Oo, Director General of the Directorate of Investment and Company Administration, pointed to the newly formed Ministry of Investment and Foreign Economic Relations as evidence that the government is facilitating a business-friendly environment in Myanmar, particularly with the establishment of a “single-

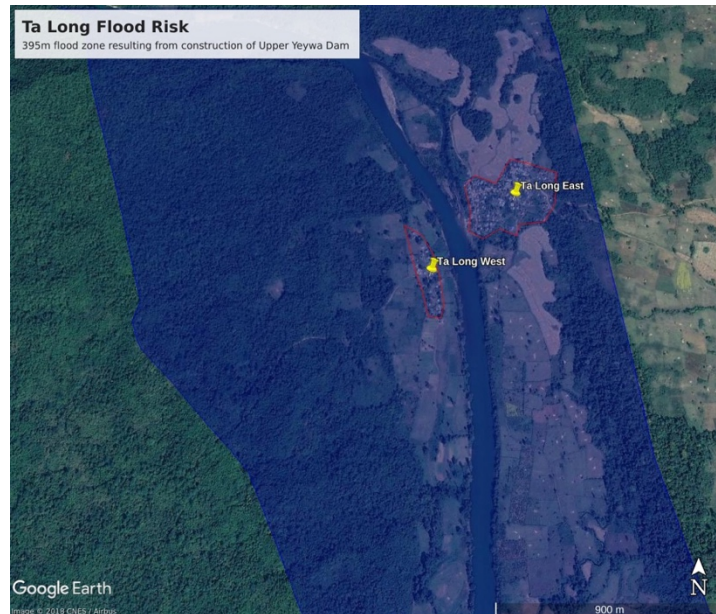
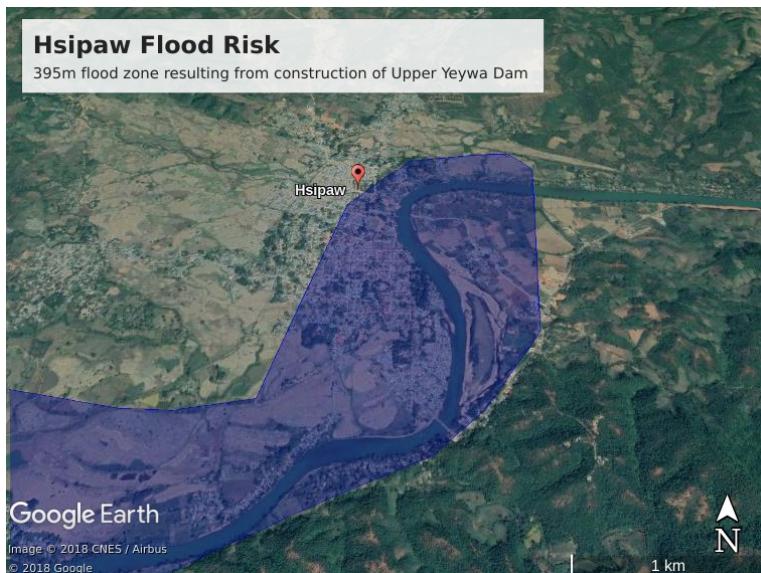
window system” to streamline start-up procedures for new businesses.^{lxv} However, it is unclear that the addition of a new ministry and another layer of bureaucracy will alleviate the issues faced by European businesses operating in Myanmar.

UPPER YEYWA DAM PROJECT

Involvement in the Upper Yeywa Dam, in Kyaukme Township in Northern Shan State has resulted in a number of international companies’ inclusion on the Dirty List, as the project has



Figure 6a. Projected Flood Zone for Upper Yeywa Dam
KIMETRICA LLC



Figures 6b – 6c. Projected Flood Zone for Upper Yeywa Dam
KIMETRICA LLC

been linked to environmental destruction and human rights violations. The dam project commenced in 2008 under the military regime and is expected to be completed in 2020. Shan villagers, MPs, and environmentalists have repeatedly petitioned and protested against the dam, pointing to negative impacts on agriculture, health, the environment and security.^{lxvi}

On December 5, Shan communities and local MPs held a press conference, renewing their appeals for the cancelling of the Upper Yeywa Dam project. The Shan Sapawa Environmental Organization is also calling for a moratorium on all dam building in Shan State, including immediate cancellation of the Upper Yeywa and Upper Kengtawng dams.^{lxvii} The organization argues that the projects are directly fueling conflict, being located in a conflict-affected ethnic state in which the government allegedly benefits from the exploitation of natural resources. Apart from the involvement of Chinese state-owned companies, the Dirty List highlights how companies from France, Switzerland, the UK, Norway and Japan are also involved.^{lxviii}

The Upper Yeywa dam is being built on the Namtu (or Myitnge) River and, once completed, is expected to submerge rice fields, farm land, orchards and one village in the surrounding area, as well as cultural artifacts including shrines. Based on hydrological data, Figures 6a, 6b and 6c

demonstrate the extent of flooding that would result after dam completion.

SOCIAL ISSUES

The two Myanmar Reuters journalists who were jailed in September, among other journalists detained around the world, were honored by *Time* magazine as Person of the Year. The award coincided with the Information Minister’s speech on the importance of state-run media, and the sentencing of peaceful protestors in Kachin to six-months jail time and a fine of MMK 500,000. The government’s disregard of their citizens’ fundamental right to free speech shows no signs of abating under the NLD.

The uptick of workers returning from Thailand to Myanmar reported last month returned to normal levels this month. A Myanmar migration expert from the International Organization for Migration (IOM) attributes last month’s reports of higher migration to a temporary crackdown by the Thai government that has since abated. Forced migration from Myanmar into China, however, is on the rise as women in Kachin and Northern Shan are trafficked into China to marry Chinese men or to carry Chinese men’s children.

In Kachin, internally displaced persons (IDP) are facing severe food shortages. Humanitarian aid organizations working in the rebel-controlled

areas find it increasingly difficult to cross from China into Myanmar with food aid, which some argue is a concerted effort by the Tatmadaw, with Chinese cooperation, to put pressure on the KIA.

FREE SPEECH WATCH

FREEDOM OF THE PRESS

Time magazine wrote a poignant piece on the current threat to journalism, globally, when it named journalists working under dangerous conditions collectively as its Person of the Year. The two Burmese, Reuters journalists, Kyaw Soe Oo and Wa Lone, were featured throughout the article. Despite increasing international pressure, the government made no indication that they will free the two men who were allegedly framed by a police officer after investigating the murder of ten Rohingya men in January 2018.^{lxxix} It was reported that activists held copies of *Time* magazine during a free speech rally on December 12, the one-year anniversary of the two reporters' arrest.^{lxxx} Social media users showed their support for the journalists by posting photographs of themselves making the thumbs up gesture, imitating a photograph of Wa Lone giving the same gesture while being escorted by police to his September court hearing.^{lxxxi} Kyaw Soe Oo and Wa Lone have become the face of Myanmar's struggle for freedom of speech, and the American publication's decision to honor them as Person of the Year has reinvigorated international and national efforts to free them. The two men are currently awaiting a ruling on their appeal which will be announced in January 2019.^{lxxxii}

Not a week before *Time* hit the newsstands, Information Minister U Pe Myint gave a somewhat troubling speech about the virtues for state-run media, arguing for its centrality, though equivocal on its independence.^{lxxxiii} Independent media, struggling and furious over state media's subsidies, dismisses state-run TV as a propaganda machine that has not evolved under the NLD, other than to arguably retrench.

FREEDOM TO PEACEFULLY ASSEMBLE

Beyond restrictions on the press, this month the government further restricted freedom of

speech by sentencing three peaceful protesters from Kachin to six months in prison and fined MMK 500,000 each. The three activists were found guilty of "defaming the military" when they protested the suffering of Kachin IDPs who were forced to flee their homes in April 2018. National and international NGOs and human rights activists criticized the move, calling it another disappointing setback in Myanmar's democratic transition.^{lxxxiv}

The sentencing of the three Kachin activists sparked more peaceful protests and more arrests. Approximately 4,000 protesters gathered in Myitkyina to protest the activists sentencing on December 11. Three additional Kachin protesters were arrested under the Peaceful Assembly Act for protesting the sentencing of the activists.^{lxxxv} The string of arrests in Kachin is indicative of the government's, and the Tatmadaw's, determination to silence critics, particularly in conflict zones. Such restrictions erode ethnic group trust in the Government and the Tatmadaw, indirectly affecting the peace process. Figure 7 below reports the number of political prisoners in Myanmar as of November 30, 2018.

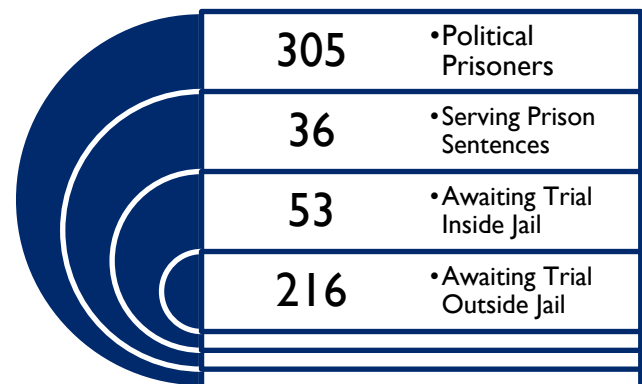


Figure 7. Political Prisoners in Myanmar (Nov 30, 2018)
KIMETRICA LLC

HATE SPEECH

Facebook continued to purge perpetrators of hate speech from its social media platform. On December 18, Facebook announced that, within Myanmar alone, it removed a total of 425 Facebook pages, 17 Facebook groups, 135 Facebook accounts, and 15 Instagram accounts, with a total reach of about 2.5 million people.^{lxxxvi}

This update demonstrates both Facebook’s increased efforts to combat hate speech on its platform, following public backlash for its lax oversight, as well as the reach and influence the platform provides, with the deleted accounts reaching millions of readers.

HUMAN TRAFFICKING

Myanmar authorities are investigating a human trafficking operation after advertisements recruiting vulnerable Shan women, as brides and surrogates for Chinese men, were hung on the streets of Muse. Muse residents report that these advertisements were seen around town for months before the investigation launched.^{lxvii} A study conducted by John Hopkins Bloomberg School of Public Health and Kachin Women’s Association Thailand estimates, in a report released this month, that approximately 21,000 women and girls from Kachin State and Northern Shan State were forcibly married to Chinese men between 2013 and 2017, and that 18,300 women and girls were forced to bear a child for Chinese men. Forced marriage resulted, on average, in younger women giving birth, and more children per couple, than in autonomous marriages.^{lxviii}

China’s One Child Policy is partly to blame. However, poor economic conditions, conflict, and poor training of officials in anti-trafficking collectively create a situation conducive to human trafficking in Northern Shan and Kachin. Human trafficking and “survival migration into China” are a direct result, the report makes plain, of ongoing conflict in the region.^{lxix}

MIGRATION

The surge in returnees and deportations of Myanmar migrant workers from Thailand that was reported last month appears to have calmed. A representative from the IOM told Kimetrica that they are not recording as many deportees at the border this December. According to the IOM representative, the Thai government frequently “flex[es] their muscles by having a crackdown.” When the Thai government decides to fetter illegal immigration, Thai police actively go to work places to check for illegal migrants. People are sent back to Myanmar forcibly, or they leave on their own accord out of fear. However, because these periods of enforcement are labor intensive for the Thai government, they rarely last long. The deported migrants and the migrants who left voluntarily come back to Thailand shortly after the crackdown fades. This

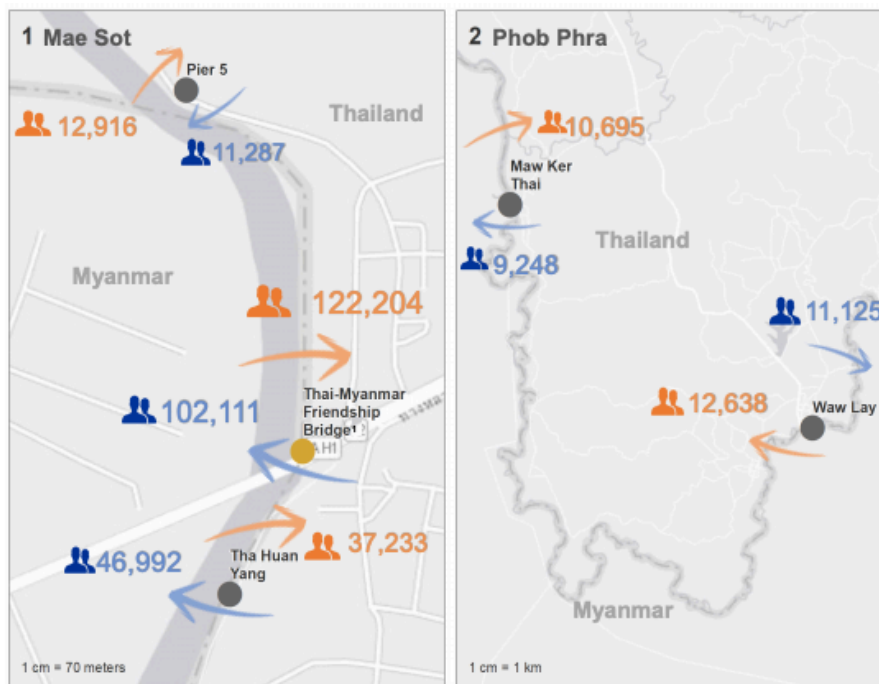


Figure 8. Flow of Migrants between Thailand and Myanmar in Mae Sot and Phob Phra
IOM / DTM THAILAND

is likely what happened last month when the Myanmar Ministry of Home Affairs announced an increase in migration from Thailand to Myanmar. However, the Ministry of Home Affairs is one of the only organizations to track border crossings, so it is difficult to assess the accuracy of their published data. The IOM tracks border crossings in Mae Sot and Phob Phra districts; November data (the latest available) indeed reflects more returnees (78,652 individuals) than outflow to Thailand (73,482).^{lxxx} Figure 8 above shows the flow of migrants in these two locations.^{lxxxi}

FOOD INSECURITY IN KACHIN IDP CAMPS

Due to the ongoing conflict between KIA and the Tatmadaw, there is an estimated 107,000 IDPs in Kachin and Shan states.^{lxxxii} Many of the IDPs are living in camps along the Myanmar-China border, an area controlled by the KIA. The camps do not receive any support from the government. In a recent statement, the Kachin Baptist Convention (KBC) said that around 70,000 IDPs are facing food shortages.^{lxxxiii} It was confirmed in separate interviews with each a representative from KBC, a representative from a nongovernmental organization (NGO) working in Kachin, and an ethnic alliance key expert that at least 30 camps with 50,000 IDPs living in KIA-controlled areas are currently suffering from food shortages.

There are a few local NGOs, community-based organizations, and church leaders who deliver food to the IDP camps although their access is limited and increasingly so. The only major organization that supports the camps is KBC, which is supported by the United Nations High Commissioner for Refugees (UNHCR). KBC's only service provision is emergency food

distribution. UNHCR provides food to KBC, which then transports it from China to the IDP camps. The indirect route of delivery is largely due to poor road conditions. According to a KBC representative, beginning in October, KBC encountered trouble crossing the border from China into Myanmar. Security forces conduct border checks, scrutinizing passports, visas, and questioning KBC's purpose for crossing the border, which is further limiting humanitarian aid access. This is limiting food distributions in the camps and greatly increasing food insecurity for Kachin IDPs. The NGO representative, who wished for their organization to remain unnamed, reported that the food supply for IDPs residing in KIA-controlled areas has always been erratic. However, the KBC representative confirmed that the food supply chain is particularly unstable right now. A September 2018 report accused the Tatmadaw and China of "weaponizing" food aid, and working in concert to limit food aid that reaches the IDP camps.^{lxxxiv}

The ethnic alliance expert, additionally, reported to Kimetrica that China and Japan are indirectly supporting the Tatmadaw's pressure on KIA to sign the NCA by restricting and blocking humanitarian assistance from international organizations, including UNHCR. The authority and credibility of EAOs, it was further reported, is undermined when humanitarian assistance is limited, as the ensuing crisis is perceived as an inability on the part of ethnic leaders to protect IDPs—a divide-and-conquer tactic to splinter ethnic groups. Kimetrica's informant summed up this tactic as "international aid [becoming] a psychological weapon of sorts," intended to cripple KIA's authority, thereby forcing them to sign the NCA.

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