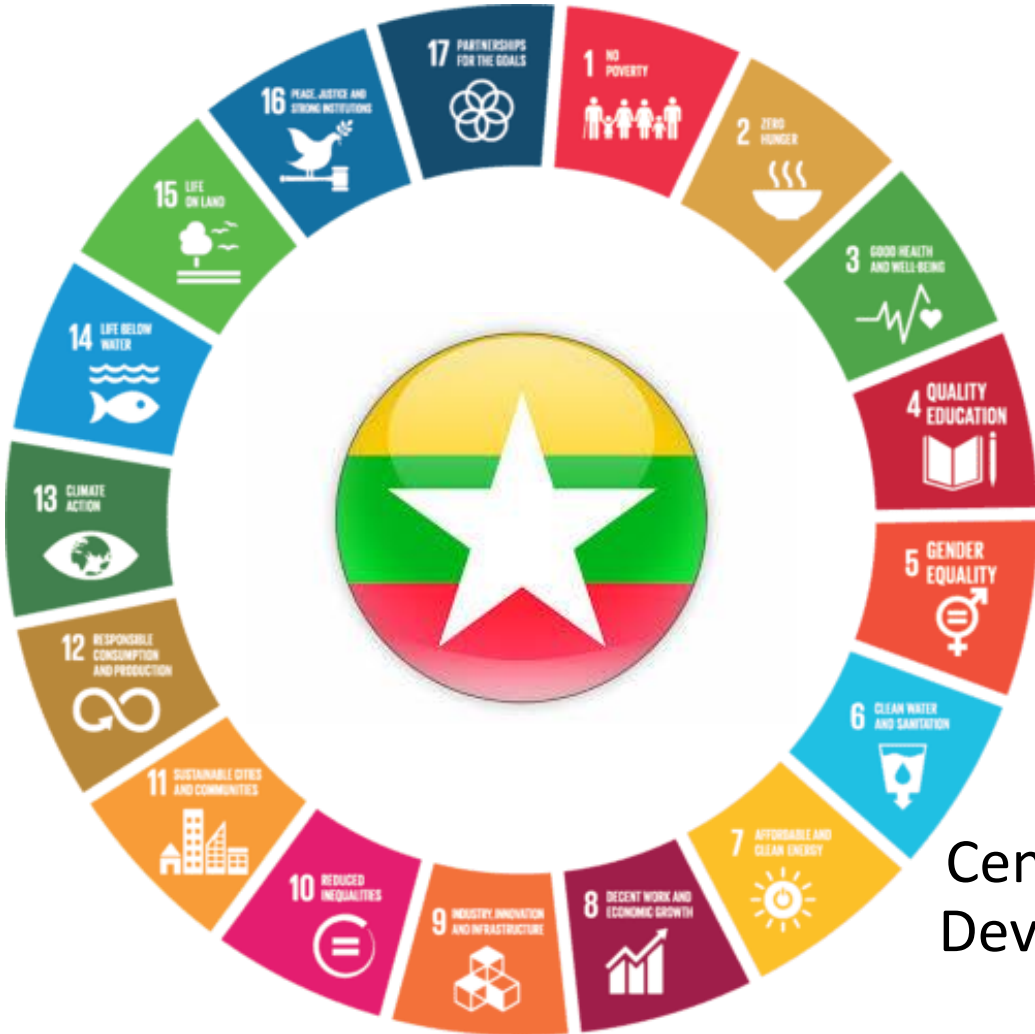


Challenges of implementing SDGs in Myanmar



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20 October 2018



Outline of this presentation

- CESD Profile
- Myanmar Sustainable Development Plan (2018-2030)
- What are the challenges?
- Challenges in relation to specific SDGs





About CESD

- Centre for Economic and Social Development (CESD) is an independent and non-political think-tank
- Established by a renowned Myanmar economist **Dr. U Myint** to mobilize development resources, both domestic and international, to bring Myanmar to her rightful place in the world.
- **Mission** dedicated to bring **evidence-based policy research, result-based knowledge-sharing** and **people-centered public advocacy** to support peaceful, prosperous and sustainable development of Myanmar.

Thematic Areas of Work

- Agriculture, Food Security and Rural Development
 - Evidence-based research: With support from the USAID and LIFT, the CESD is presently conducting comprehensive household surveys in 3 out of 6 agro-climatic zones of Myanmar—the Delta, the Central Dry Zone and the costal uplands—to analyze farm economics and small-holder’s choice of farming strategy to cope with changing market and climatic conditions
 - Knowledge sharing and capacity building: CESD tried to interface between local stakeholders and international development partners, to analyze comprehensive datasets while beginning to scale up its ability to analyze value chain parameters and geospatial information
 - **Notable Outcomes**: “From Rice Bowl to Food Basket” (White paper for MoALI); Master Plan for Agriculture Sector Development (Yangon and Mandalay); Rubber Sector Development (Mon State); CESD led the advocacy on diversifying agriculture sector, working closely with the industrial and trade associations, to promote policy uptake on other important agriculture export commodities such as pulses, rubber, coffee and fruits and vegetables

Thematic Areas of Work

- **Labour Market Reform and Industrial/Trade Development**
 - Evidence-based research: CESD undertook a series of well-designed research initiatives to provide objective and technical evidence to tripartite stakeholders: (i) living wage surveys in three biggest industrial cities – Yangon, Mandalay and Bago; (ii) joint analysis of household expenditure surveys of the Ministry of Labour, Immigration and Population (MoLIP, formerly of MoLES) over 20,000 households; (iii) comparative market analysis of low-wage economies in Asia. Later, CESD also undertook surveys on migration in Shan, Karen and Mon States, the largest outgoing and transit regions in Myanmar with a particular focus on migrant women
 - Knowledge sharing and public advocacy: Using reliable data, CESD conducted several knowledge-sharing workshops with both labor unions and industrial associations as well as capacity building training for the MoLIP staff to highlight international best practices
 - **Notable Outcomes**: National tri-partite dialogue process for determining minimum wage; CESD collaborated with MoLIP to conduct and produce big-data analytics to support labor market reform initiatives in Myanmar

Thematic Areas of Work

- **Governance and Institutional Reform:**
 - Evidence-based research: Designed and conducted technical scoping study on the composition of extractive industries in oil and gas and mineral sectors, payment and reporting mechanisms, institutional capacity and procedural mechanisms of union-level and sub-national revenue authorities, with a particular focus on analyzing the feasibility of the proposed threshold of largest international and domestic industries to be included in the first EITI report
 - Knowledge sharing and capacity building: With factual evidence, CESD organized and facilitated multi-stakeholder consultation mechanisms, both at the union and regional levels, amidst contentious policy environment requiring conscious trust building among key stakeholders. It provided capacity building of affected communities and set up a rapid response team to mediate and coordinate between the private companies, regional governments and CSOs
 - **Notable Outcomes**: Achieving Myanmar's membership into the international Extractive Industry Transparency Initiative (EITI); CESD collaborated with the International Growth Centre to work on value chain development options for artisan jade miners;

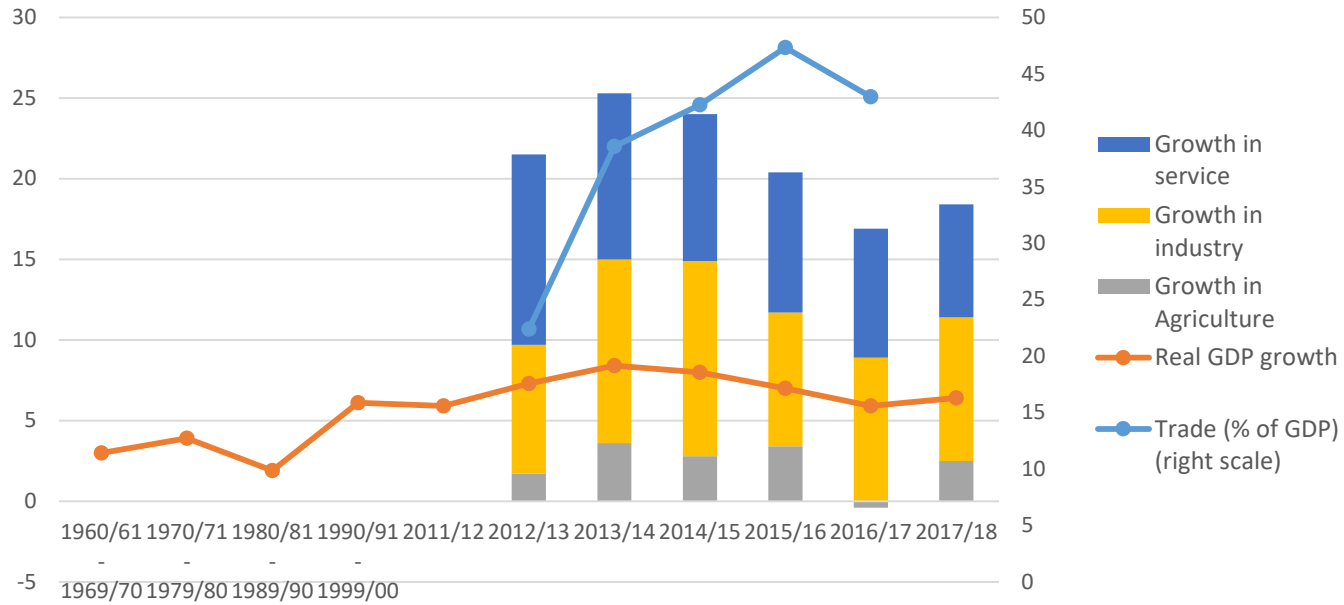
Myanmar: Country Overview



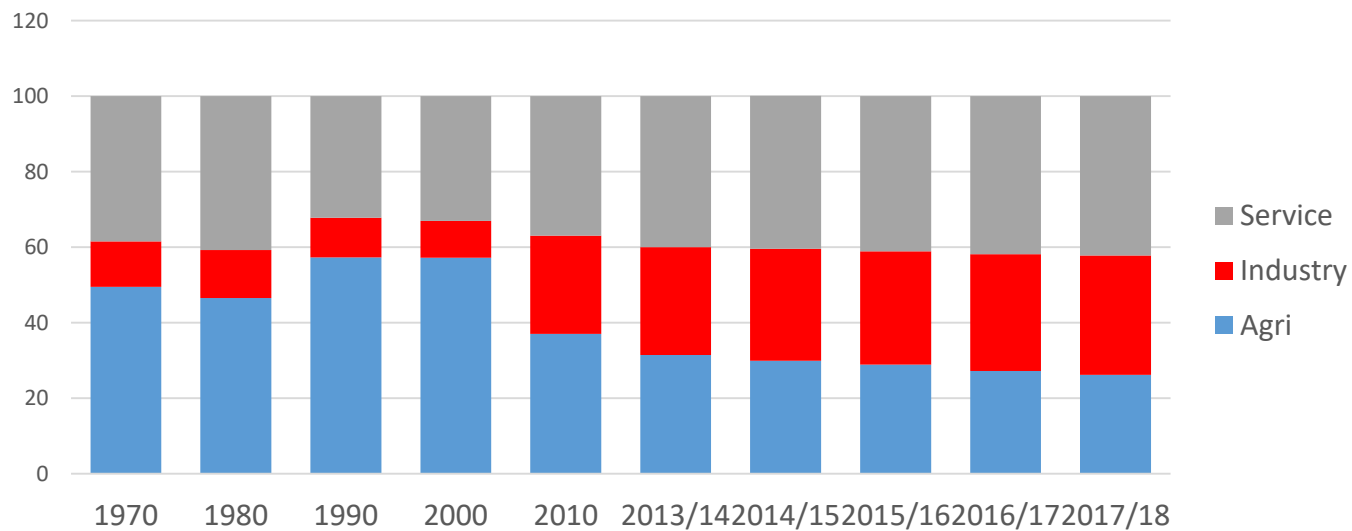
- Population : 53 million (2014)
- GDP : USD 63.14 Billion (2014)
- GDP per capita : USD 1315 (2017)
- Rural Population: 66% of total population(2014)
- Population Below poverty line : 26% (2010) - 19.4% (2015)
- Ease of Doing Business Index (World Bank) : 171th out of 190 countries (2018)

Changing Structure of Myanmar Economy

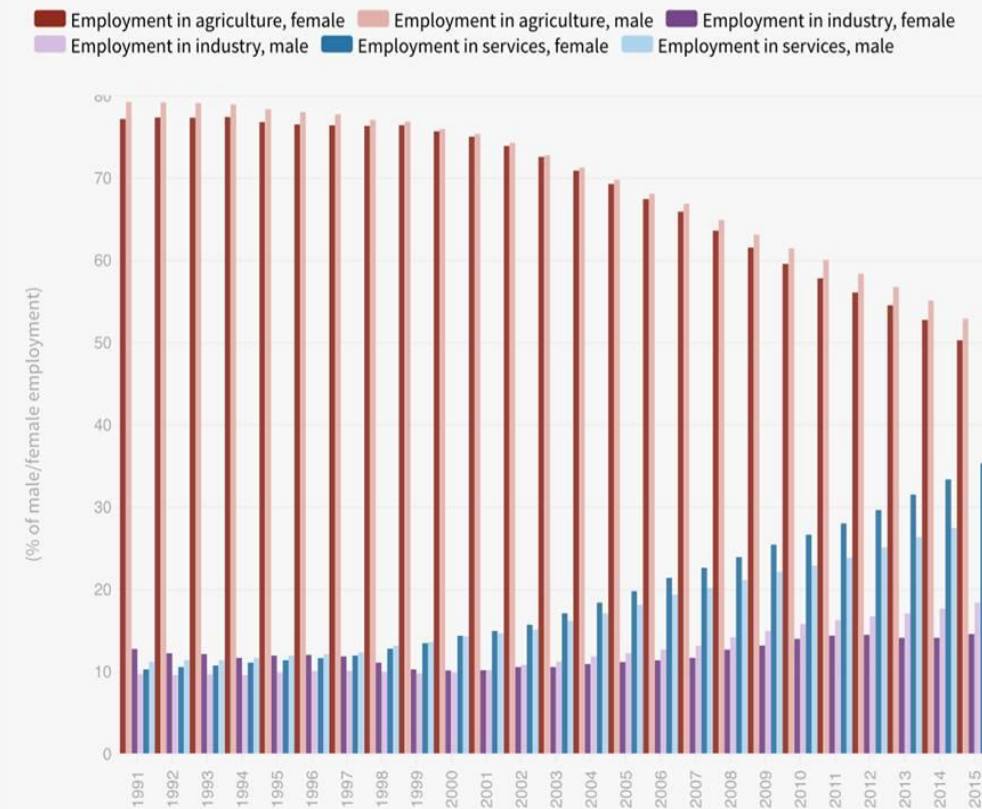
Myanmar real GDP growth and Trade to GDP ratio (1960/61 - 2017/18)



Myanmar GDP production (% of share, 1970 -FY 2017/18)



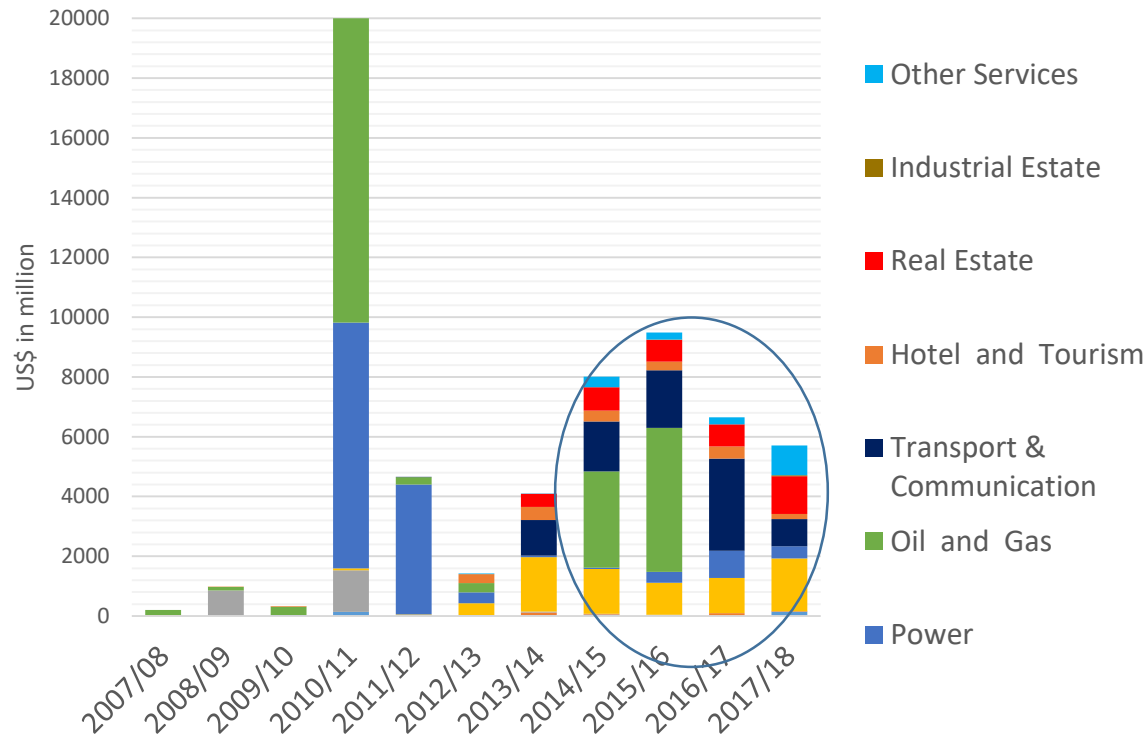
Employment by Gender and Sector in Myanmar - 1991-2017 (modeled ILO estimate)



Source: Myint (2009), Myanmar National Planning and Economic Development (NPED) and the World Bank

Foreign Direct Investment and Exports

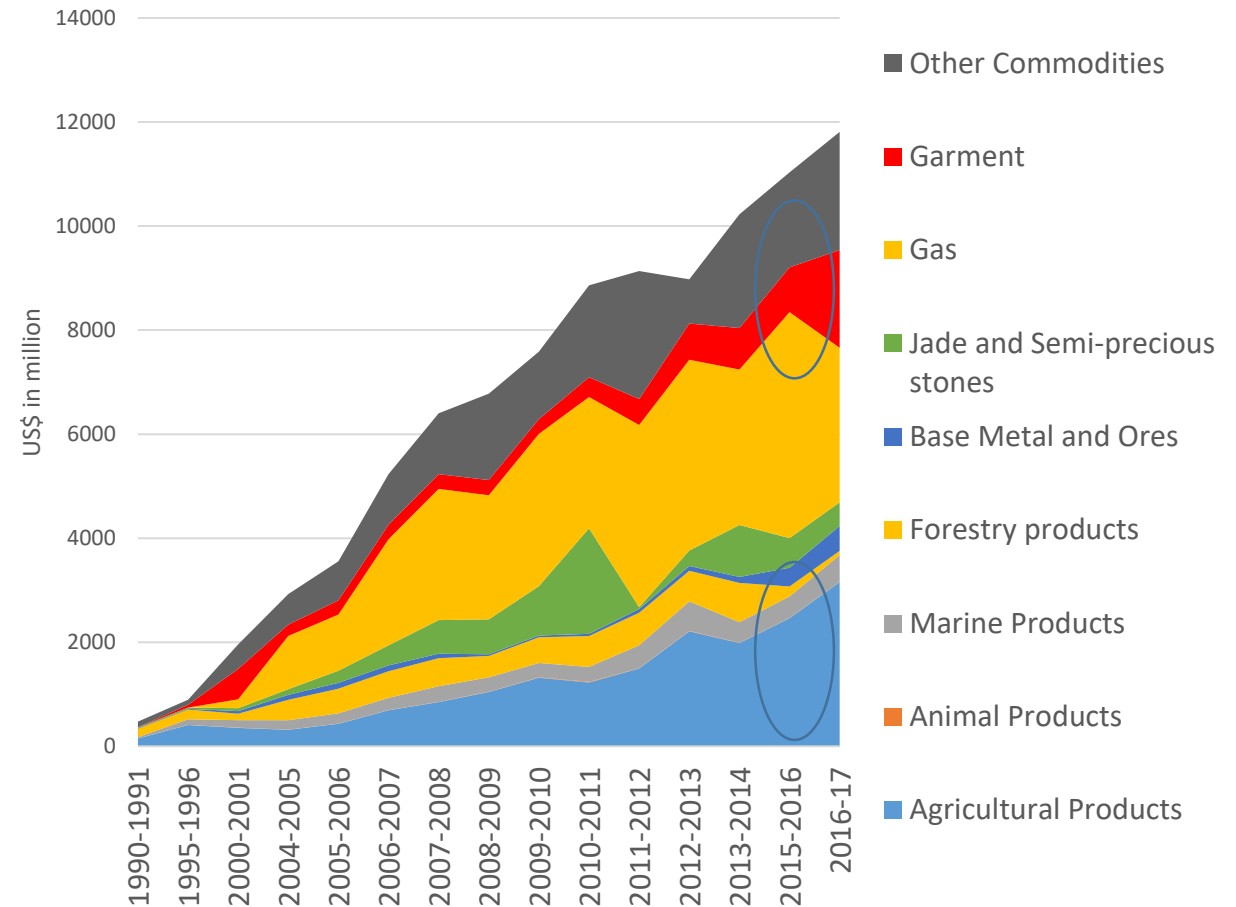
Myanmar's Yearly Approved Amount of Foreign Investment by Sector (2007/08 - 2017/18)



"Shifted from natural resource based to non-natural resource based"

Source: DICA (2018)

Myanmar's Exports (1990/91 - 2016/17)

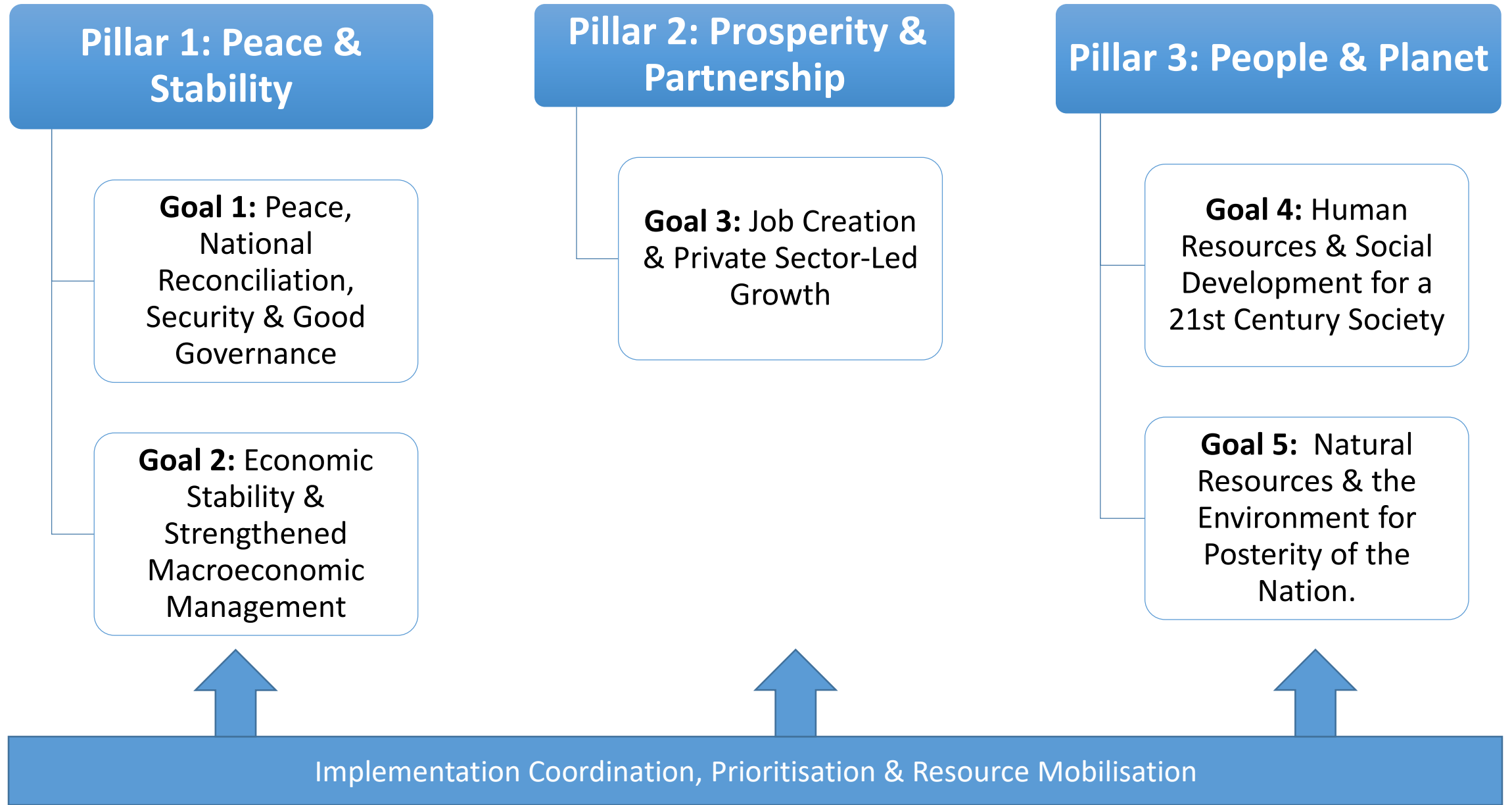


Source: Myanmar Central Statistical Organization(CSO)

The Myanmar Sustainable Development Plan

- The Myanmar government is committed to integrating SDG into the national development plan, which is best reflected in Myanmar Sustainable Development Plan 2018 - 2030
- Each goal is assigned to a governmental agency and matched with a relevant SDG.
- Since the Myanmar Sustainable Development Plan was only published in August 2018, there is little evidence available on the implementation progress.

The Myanmar Sustainable Development Plan



<p>Pillar 1: Peace & Stability</p>	<p>Goal 1: Peace, National Reconciliation, Security & Good Governance</p> <p>SDG: 16.1, 16.6, 16.7</p> <p>SDG: 10.1</p> <p>SDG: 8.3</p>	<p>(1) Secure and further foster Union-wide peace</p> <p>(2) Promote equitable and conflict-sensitive socio-economic development throughout all States and Regions</p> <p>(3) Promote greater access to justice, individual rights and adherence to the rule of law</p> <p>(4) Enhance good governance, institutional performance and improve the efficiency of administrative decision making at all levels</p> <p>(5) Increase the ability of all people to engage with government</p>
	<p>Goal 2: Economic Stability & Strengthen Macroeconomic Management</p> <p>SDG: 8, 17, 16</p>	<p>(1) Effectively manage the exchange rate and balance of payments</p> <p>(2) Reduce inflation and maintain monetary stability</p> <p>(3) Increase domestic revenue mobilisation through a fair, efficient and transparent taxation system</p> <p>(4) Strengthen public financial management to support stability and</p>

Pillar 2: Prosperity & Partnership

Goal 3: Job Creation & Private Sector-Led Growth

SDG: 2,6,16

- (1) Create an enabling environment which supports a diverse and productive economy through inclusive agricultural, aquacultural and polycultural practices as a foundation for poverty reduction in rural areas
- (2) Support job creation in industry and services, especially through developing small-and medium-sized enterprises
- (3) Provide a secure, conducive investment enabling environment which eases the cost of doing business, boosts investor confidence and increases efficiencies
- (4) Further reform our trade sector and strengthen regional and international cooperation and linkages
- (5) Increase broad-based access to financial services and strengthen the financial system overall
- (6) Build a priority infrastructure base that facilitates sustainable growth and economic diversification
- (7) Encourage greater creativity and innovation which will contribute to the development of a modern economy

Pillar	Goal	Guiding Document
<p>Pillar 3: People & Planet</p>	<p>Goal 4: Human Resources & Social Development for a 21st Century Society</p> <p>SDG 4, 12, 13,</p>	<ul style="list-style-type: none"> (1) Improve equitable access to high quality lifelong educational opportunities (2) Strengthen health services systems enabling the provision of universal health care using a path that is explicitly pro-poor (3) Expand an adaptive and systems based social safety net and extend social protection services throughout the life cycle (4) Increase secure access to food that is safe and well-balanced (5) Protect the rights and harness the productivity of all, including migrant workers

Pillar 3: People & Planet

Goal 5: Natural Resources & the Environment for Posterity of the Nation.

SDG: 15,12,14,2,11,1,13

- (1) Ensure a clean environment together with healthy and functioning ecosystems**
- (2) Increase climate change resilience, reduce exposure to disasters and shocks while protecting livelihoods, and facilitate a shift to a low-carbon growth pathway**
- (3) Enable safe and equitable access to water and sanitation in ways that ensure environmental sustainability**
- (4) Provide affordable and reliable energy to populations and industries via an appropriate energy generation mix**
- (5) Improve land governance and sustainable management of resource-based industries ensuring our natural resources dividend benefits all our people**
- (6) Manage cities, towns, historical and cultural centers efficiently and sustainably**



- What are we going to do?
- Measurement: Outcomes not input
 - Input problem? - budget and existing plans
 - Action problem? – management and leadership
 - Resources problem? – grant mechanism

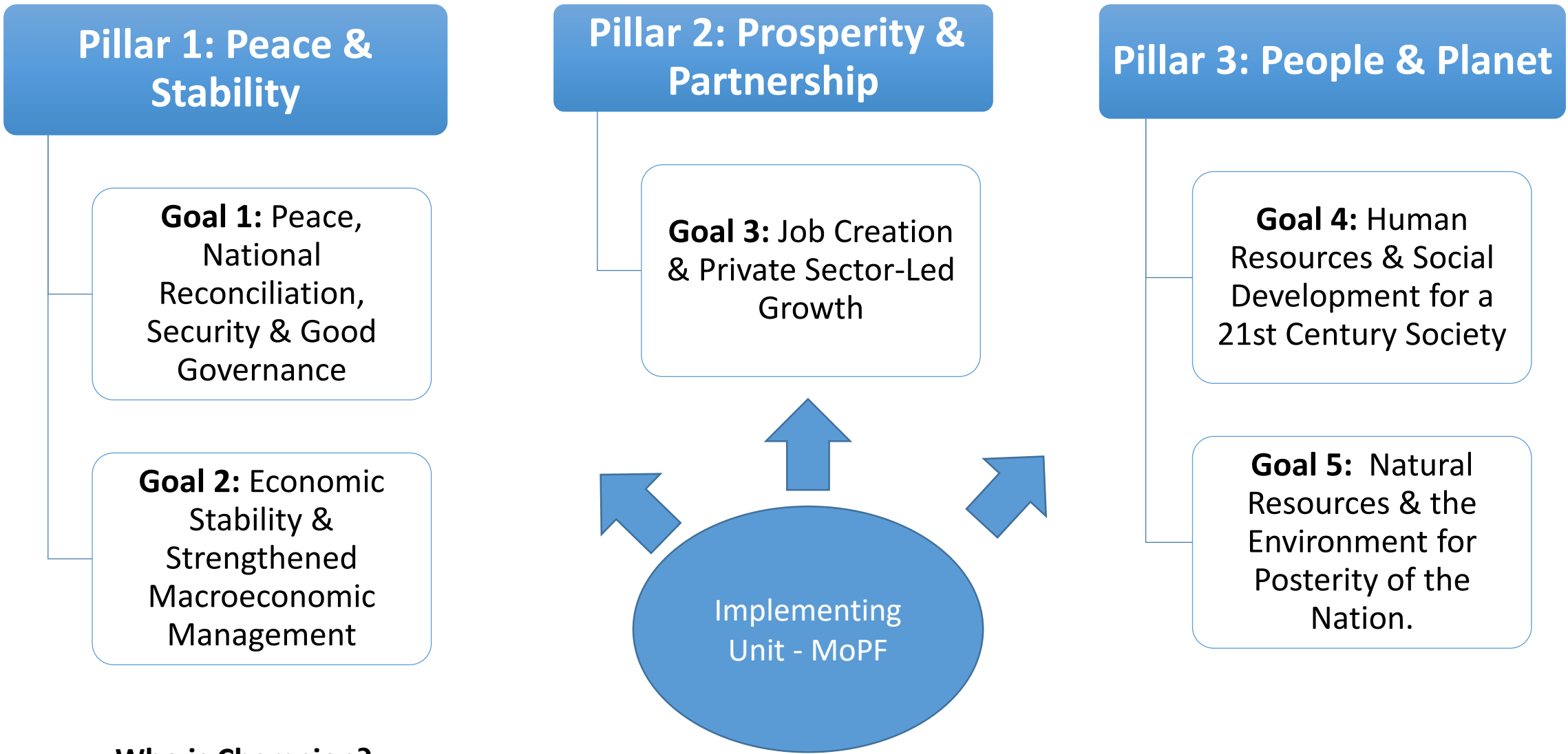
Goal	Guiding Document
Goal 3: Job Creation & Private Sector-Led Growth	Myanmar Agriculture Development Strategy 2018/19 – 2022/23 National Export Strategy 2015-2019 Myanmar Financial Inclusion Roadmap 2014-2020 Myanmar Industrial Policy 2016 Private Sector Development Framework and Action Plan National Strategy for Rural Roads and Access 2016 SME Law & Policy 2015 On going plans ... ? For example – Aquaculture master plans

Policy alignment

Prioritization and Government agencies Capacity

Ministries based (Zero based) to policy based budgeting





- **Who is Champion?**
- **What is Coordination Mechanism at union level and between regional and union**

Financing

- **Tax to GDP ratio is the lowest in ASEAN**
- **Budget Deficit (4.4 % of GDP in 2017 and expected to expand by 7.6 % in FY 2018-19)**
- **High trade deficit (3.87 billion in FY 2017018)**
- **Slow FDI growth**
- **World's seventh largest recipient of aid in 2015, but...**

Partnership and Stakeholder participation

- **Public – Private Dialogue led by vice president**
- **Myanmar Extractive Industries Transparency Initiative (Gov, CSOs and Companies)**
- **Tripartite mechanism on decent work (GOV, unions and ILO/DPs)**
- **No formal platform CSOs/Citizen on SDGs focus**

Data deficit

- Did not conduct a comprehensive census for 30 years until 2015
- Conducted Labour Force Survey in 2015 for the first time within 3 decades
- According to UNDP and Central Statistical Organization (CSO) -
 - 44 out of 288 indicators were marked as readily available (15.3%), 78 can be computed easily (27.3%) , 19 could be with effort (6.6%) and 53 indicators required additional data collection (18.4%) (especially education, justice and security – SDG 4 and 16)

Way Forward

- Identifying Champion
- Clear institution structures
 - Localization and decentralization framework
- Explore innovative approaches for financing
- Strengthen people participation
- Ensuring adequate and reliable data for all indicators
- Closer engagement with partners from region

