



# ISSUE BRIEF

*"Advancing the Strategic Potential of India-US Relations, Accelerating India's Economic Development"*

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## India – Myanmar Connectivity: A Strategic Imperative

by Sanjay Pulipaka



India's Look East Policy was initiated in 1992. The end of the Cold War enabled India to interact with a new set of actors in the international arena with greater intensity. Moreover, the Indian economy was under severe stress and the need for diversified trade was acutely felt. India looked East towards the ASEAN countries to expand its economic and political engagement.

In the late 1980s and early 1990s, India supported the democracy movement in Myanmar and as a consequence the relationship with the then military government was frosty. However, by the mid-1990s India adopted a more nuanced policy towards Myanmar and started engaging the military regime. Gradually, the relationship acquired a certain comfort level and it became possible for India to envisage connectivity projects involving Myanmar.

### China's Growing Presence

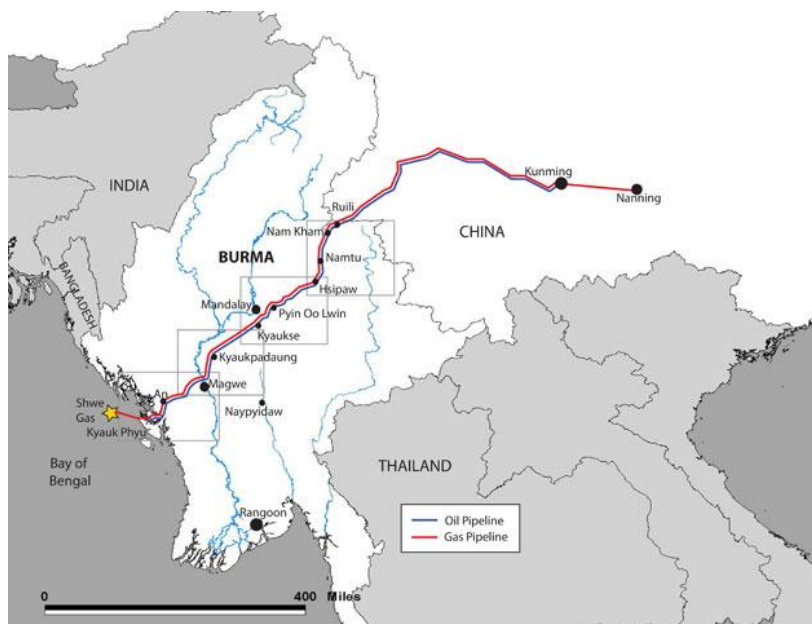
Meanwhile, sanctions by Western countries prompted Myanmar to move closer to China for political and economic support. China seized the opportunity and made rapid inroads in the political and economic landscape of Myanmar. China expanded its connectivity projects in Myanmar to bolster economic activity in its Yunnan province. More importantly, for China, Myanmar is a natural land-bridge to access the Bay of Bengal and the Indian Ocean. The most ambitious among these projects has been the oil and gas pipelines from Kyaukphyu in the Rakhine province of Myanmar, on the Bay of Bengal coast, to Kunming in the Yunnan province in China.

### Chair's Column

#### India's reinvigorated Look East Policy (LEP) requires Myanmar connectivity

For over two decades, India's "Look East Policy" (LEP) has been hobbled by one major constraint: balancing India's example of democratic governance with the strategic need to engage the military regime in Myanmar. With that country's gradual democratic opening in recent years, the focus is shifting to energizing India's slow and steady efforts to develop connectivity infrastructure and boost economic and security ties with Myanmar.

As this *Issue Brief* by Sanjay Pulipaka, ICRIER-Wadhvani Programme Fellow, indicates there are major shortfalls not only in the physical connectivity between India's Northeast and this vital gateway country linking India and Southeast Asia, but also in soft systems to facilitate cross border trade, commerce and travel. India's poor track record on project completion stands exposed by interminable delays which undermine



Map Source: "China Now No. 1 Investor in Burma," Mizzima, 18 January 2012, available at <http://www.mizzima.com/business/6436-china-now-no-1-investor-in-burma.html>

In 2008, China National Petroleum Corporation (CNPC) signed a contract to import natural gas from the Shwe gas fields in the Bay of Bengal and started construction of oil and gas pipelines in 2010. It has been reported that the natural gas pipeline, which has the capacity to carry 12 bn cubic metres of gas annually, will be operational by May 30, 2013 and the crude oil pipeline will be operationalised next year<sup>1</sup>. More recently, China Railways Engineering Corporation and the Myanmar Union Ministry of Rail Transportation signed an MOU in 2011 to build the railway network from Kyakphyu to Kunming<sup>2</sup>. China has also operationalised a host of connectivity projects, specifically in Northern Myanmar, which are facilitating deeper economic integration of Myanmar with the bordering regions of China.

China's economic activity and connectivity networks in Myanmar have made its presence in the Bay of Bengal a growing reality, which will have strategic implications in the long run. It appears that Beijing has even more ambitious plans for the Bay of Bengal, including a special economic zone, power plants and a deep water commercial seaport in Kyaukphyu, involving up to \$100 billion in investment in the coming years<sup>3</sup>. Given the scope of such investments, strategist C.Raja Mohan asks, "would it be illogical, then, for Beijing to consider securing its massive investments in Kyaukpyu with a credible naval presence in the Bay of Bengal?<sup>4</sup> " It should also be noted that China already possesses significant leverage in terms of the relationship it has with some of the armed ethnic groups on Myanmar's northeastern borders<sup>5</sup>.

both its interests and regional image. High level visits, like that of the Indian Prime Minister Manmohan Singh in May 2012, can yield agreements but cannot deliver on implementation unless there is improved oversight and coordination within the Government of India.

This report identifies several areas that require urgent attention, including:

- Coordinated socio-economic development of border areas, improved infrastructure for cross-border trade and travel, and direct civil aviation links.
- Completion of Kaladan multi-modal transport project and the India-Myanmar-Thailand Trilateral Highway; planning of future railway connectivity.
- India's participation in the development of deep sea ports such as Dawei to speed up progress on the Mekong India Economic Corridor designed to provide seamless connectivity from Chennai to Hanoi.
- Promotion of greater engagement of the Indian private sector in exploring economic and commercial opportunities in Myanmar.
- Capacity building support for the Myanmar navy for bilateral cooperation on maritime security in the eastern reaches of the Bay

China is by far the largest investor in Myanmar. The Chinese investments (including investments from Hong Kong) amounted to \$ 20 billion, which was approximately half of the total \$41 billion FDI in Myanmar during 1989-2012<sup>6</sup>. Its only setback in recent years has been the suspension of the Myitsone hydro-power project on the Irrawaddy River, on account of widespread popular discontent over population displacement, environmental impact and the sale of bulk of the power generated to China.

**India’s Initiatives**

While China has made rapid economic inroads, India has largely been playing catch up in Myanmar. According to statistics compiled by the European Union, India is the third largest trading partner of Myanmar. However, a closer look at the figures will reveal the absence of diversity in Myanmar’s international trade and also India’s weak trade-links with Myanmar. China and Thailand account for 31.4 per cent and 28.8 per cent of Myanmar’s international trade respectively.

MYANMAR’S TRADE WITH MAIN PARTNERS 2011			
<b>The Major Imports Partners</b>		<b>The Major Export Partners</b>	
Rk	Partners	Mio euro	%
World (all countri		10,215.2	100.0%
1	China	4,003.5	39.2%
2	Thailand	2,335.0	22.9%
3	Singapore	1,006.0	9.8%
4	South Korea	553.3	5.4%
5	Malaysia	464.4	4.5%
Rk	Partners	Mio euro	%
World (all countri		6,221.6	100.0%
1	Thailand	2,393.2	38.5%
2	China	1,150.3	18.5%
3	India	862.5	13.9%
4	Japan	406.3	6.5%
5	South Korea	204.8	3.3%
<b>The Major Trade Partners</b>			
Rk	Partners	Mio euro	%
World (all countri		16,436.9	100.0%
1	China	5,153.8	31.4%
2	Thailand	4,728.2	28.8%
3	India	1,249.5	7.6%
4	Singapore	1,064.8	6.5%
5	Japan	827.0	5.0%

Source: “Myanmar: EU Bilateral Trade And Trade With The World,” Report of DG Trade Statistics, European Union, 29 November 2012, p.5

This implies that China and Thailand account for more than 60 per cent of Myanmar’s international trade. On the other hand, India’s trade with Myanmar is a mere 7.6 per cent of the latter’s overall trade. It should be noted that because of problems associated with the official exchange rates of the Myanmar Kyat, a large component of India-Myanmar trade is conducted through Singapore, which does not get reflected in the official trade figures. Nonetheless, the overall trade between India and Myanmar is way below its potential. This despite the fact that India shares approximately 1643 kms of land border with Myanmar and for India, Myanmar is a critical land-bridge to Southeast Asia. While India imports edible vegetables, wood and wood products, it exports pharmaceutical products, electrical and electronic equipment and machinery<sup>7</sup>. Significantly, India imports edible

of Bengal.

- Support for democratic institution building in Myanmar through training of professionals and sharing of India’s vast experience in parliamentary democracy.
- Advancing complementarities on Myanmar initiatives with regional partners like Japan and the US.
- Offering assistance to Myanmar to shoulder its responsibilities as Chair of ASEAN in 2014.

While it is true that Myanmar’s democratic transformation is still tentative and the country faces several complex domestic challenges, from social unrest to lingering ethnic insurgencies, India faces a clear test of its resolve to engage and act East by strengthening connectivity, trade, security and other institutional linkages with Myanmar.

With oil and gas pipelines and railway links being constructed by China between Kyaukphyu in the Bay of Bengal and Kunming, Myanmar has already become Beijing’s link to the Indian Ocean. It remains to be seen if India can also add urgency to its efforts to convert Myanmar into its land bridge to mainland and maritime reaches of Southeast Asia. India’s reinvigorated LEP, to be credible, demands no less.

Hemant Krishan Singh  
ICRIER-Wadhvani US Chair

vegetables (such as pulses) from Myanmar in large quantities and such imports account for as much as 33 per cent of India's global imports of edible vegetables<sup>8</sup>.

In spite of geographic contiguity, India's border trade with Myanmar is insufficiently developed and imbalanced. India and Myanmar signed a border trade agreement in 1994, which mandates that the trade between the two will take place



Map Source: Myanmar-India Border Trade Posts, Department of Commerce and Consumer Affairs, Government of Myanmar, available at, [http://www.commerce.gov.mm/index.php?option=com\\_content&view=article&id=87&Itemid=122&lang=en](http://www.commerce.gov.mm/index.php?option=com_content&view=article&id=87&Itemid=122&lang=en)

through Customs Posts in Moreh (India) – Tamu (Myanmar) and Zowkhathar (India) – Rhi (Myanmar)<sup>9</sup>. With only two border trade points (Moreh-Tamu, Zokhawthar-Rhi) currently functional, it is not surprising that India's formal border trade with Myanmar is meagre, amounting to less than one per cent of the overall India-Myanmar trade<sup>10</sup>. Informal border trade, reported to be in the region of approximately \$ 11 million a month, is also conducted across the porous border<sup>11</sup>. However, the prevailing security situation, informal taxes by insurgent groups<sup>12</sup>, and absence of road and rail connectivity networks tend to hinder greater border trade between the two countries.

India has been working on improving its connectivity networks with Myanmar and the following are some of the significant projects underway:

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### Kaladan Multi-Modal Project:

Kaladan Multi-Modal project was conceptualized to provide landlocked Northeast India with an access to the sea. More importantly, given the past unpredictability in India's relations with Bangladesh and the problems associated with the absence of transit agreements, the Kaladan multi-modal project was designed to provide alternative transportation networks between India and its landlocked Northeast India. The Kaldan project significantly reduces the distance between major Indian cities such as Kolkata and Northeast India. The project also facilitates greater economic interaction between Northeast India, Myanmar and beyond. The project has three components: <sup>13</sup> (a) developing the Sittwe port to facilitate sea transport between Kolkata and Sittwe (539 Kilometres); (b) developing the inland waterway transport between Sittwe to Setpyitpyin (Kaletwa), which is about 225 kms; and (c) Setpyitpyin to India-Myanmar border road transport which is about 62 kms.

In April 2008, India and Myanmar signed an agreement on the Kaladan Multi-Modal Project. Two years later, in April 2010, Essar India Ltd was awarded the contract for port construction and for inland water works<sup>14</sup>. The project is facing numerous challenges such as underestimation of road length and the absence of effective inter-ministerial coordination. The Indian Ministry of Power's proposals to construct hydro-electric projects on tributaries of the Kaladan River have raised concerns about the navigability of the river in the coming years<sup>15</sup>. The joint statement issued during Prime Minister Manmohan Singh's visit to Myanmar in May 2012 "expressed satisfaction at the steady progress being made on the Kaladan Multimodal Transit Transport Project<sup>16</sup>." It is anticipated that the construction work pertaining to Sittwe port will be completed by 2013<sup>17</sup>, but there is no clear timeline yet for the project completion.

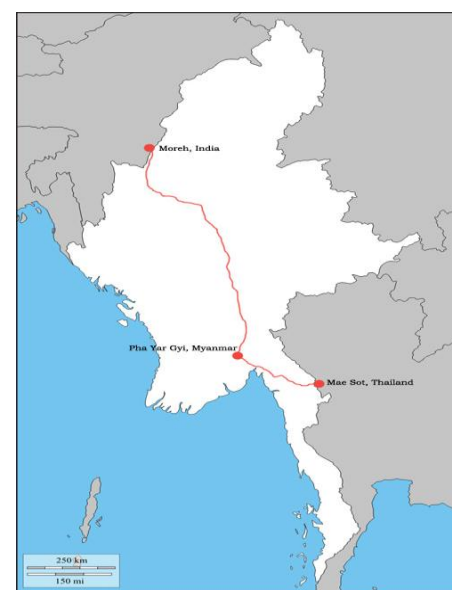
### Trilateral Highway:

A Trilateral Ministerial Meeting on Transport Linkages, held in Yangon in April 2002, conceptualized the idea of a Trilateral Highway connecting India, Myanmar and Thailand<sup>18</sup>. The project proposed to link Moreh (India) with Mae Sot (Thailand) through Bagan (Myanmar). In May 2002, providing details of the project, India's Minister of External Affairs stated that the Trilateral Highway would be completed within the timeframe of two years and that two task forces had been constituted to operationalise the project<sup>19</sup>. More than a year later, in December 2003, the Foreign Ministers of India, Myanmar and Thailand met in New Delhi and came up with a three phase implementation process wherein all the parties agreed to strengthen the road networks in their respective countries. As per the minutes of the meeting, India was to complete 78 kms of missing links in phase-I, explore the possibility of upgrading an additional 132 kms,



Map Source: Aung Marm Oo, "Indian Look East Policy and the Kaladan Project of Western Burma," Mizzima, 24 January 2013.

Kaladan Transit Route		
Stretch	Mode	Distance (Kms)
Kolkata- Sittwe	Sea route	539
Sittwe - Paletwa/Kaletwa	IWT (River Kaladan)	225
Paletwa/Kaletwa Indo-Myanmar border	Road	62
	Total	826
Source : Inland Waterways Authority of India		



Map Source: "India-Myanmar Sign Key Trade and Development Deals," India Briefing, 29 May 2012.

and prepare project reports for the construction of a bridge and causeway across the Irrawaddy River<sup>20</sup>. However, the project has continued to face numerous delays.

During his visit to Myanmar in May 2012, Prime Minister Manmohan Singh stated that India would repair/upgrade 71 bridges on the Tamu-Kalewa friendship road and also upgrade the Kalewa-Yargyi road segment to highway standard<sup>21</sup>. A new deadline, of 2016, for the completion of the Trilateral Highway and the revival of the India-Myanmar-Thailand Joint Task Force was also announced during the visit. The Joint Task Force at its meeting in September 2012 decided to work on issues such as the harmonization of customs and immigration procedures at border check-posts in order to establish connectivity by 2016<sup>22</sup>.

### **Stilwell Road:**

The other major project pertaining to India-Myanmar connectivity is the Stilwell Road, which was constructed during the Second World War to connect Ledo in Assam with Kunming in the Yunnan province of China. Concerns have been expressed in India that the revival of this road would give an advantage to China in the event of hostilities. Moreover, there are also concerns in Myanmar that the road currently passes through territories controlled by various insurgent groups<sup>23</sup> and hence the revival of this road would result in increased revenues for the armed groups.

### **Air-Connectivity:**

While the demands for seamless road connectivity between India and Myanmar have to constantly negotiate concerns related to security and terrain, there are no such concerns with regard to air connectivity between the two. And yet, the airline connectivity between the two countries is minimal with the operation of only two direct flights a week from India. Proposals from private Indian carriers to start new services to Yangon are yet to materialize. Many in Myanmar complain that while they are very keen on accessing India's health care facilities, they are not able to do so due to the absence of frequent direct air-flights between the two countries. Improvement of air-connectivity remains an urgent requirement for enhancing economic ties and people-to-people contacts.

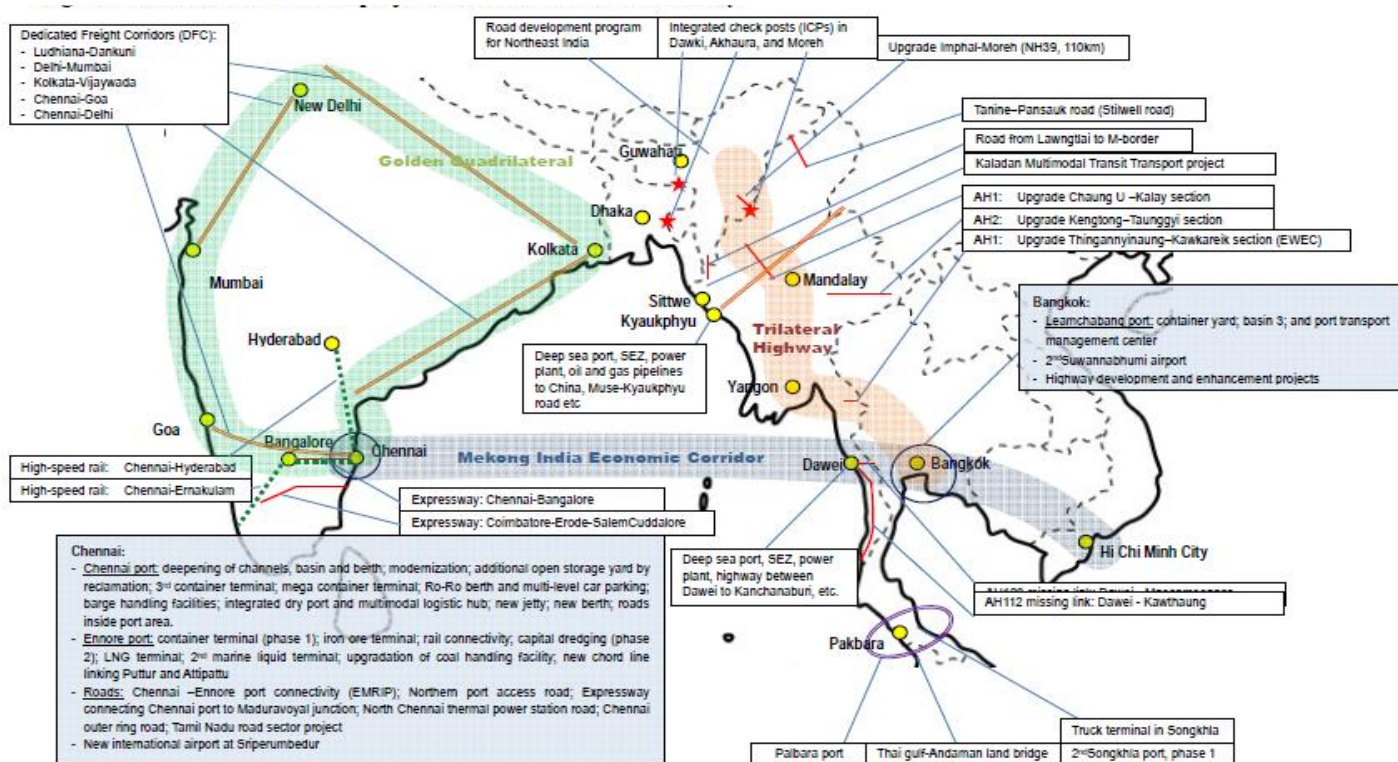
### **Rail Connectivity:**

At the moment, rail connectivity between India and Myanmar is completely absent. In 2005, India's RITES Ltd conducted a feasibility study and suggested new rail links between Jiribam-Imphal-Moreh (in India) and Tamu (Moreh)-Kalay-Segyi (in Myanmar)<sup>24</sup>. In October 2012, the India's Cabinet Committee on Infrastructure approved the construction of a new broad-gauge line from Imphal Road (Tupul) to Imphal at a cost of approximately \$ 822.96 million, to be completed in 2016. The project is facing numerous challenges such as heavy monsoons, a fragile security situation, and economic blockades. These new rail links would eventually be integrated into the proposed trans-Asian railway project, which seeks to connect Malaysia, Thailand, Vietnam, Cambodia, Myanmar, Bangladesh, India and Pakistan by rail networks<sup>25</sup>.

### **Border Areas Development:**

During the Indian Prime Minister's visit to Myanmar in May 2012, both sides also agreed to start a bus service between Imphal in India and Mandalay in Myanmar and to undertake joint border area development through physical and social infrastructure programmes.

**Selected Infrastructure Projects for ASEAN-India Connectivity**



Source: Fukunari Kimura and So Umezaki (Eds.), “ASEAN - India Connectivity: The Comprehensive Asia Development Plan, Phase II,” ERIA Research Project Report 2010-7, December 2011, p.25

**Ports and Integrated Production Networks:**

Organizations such as the Economic Research Institute for ASEAN and East Asia (ERIA), have been advocating new connectivity networks by operationalising deep sea ports such as Dawei in Myanmar, which would provide greater connectivity with the Chennai port in India and beyond. The extended Dawei-Chennai link, termed the Mekong-India Economic Corridor (MIEC) by ERIA, seeks to facilitate integrated production networks between India and ASEAN by combining physical connectivity with industrial clusters and high-speed rail networks. It should be noted that along with Dawei, a fairly large number of ports such as Yangon, Sittwe, Kyaukphyu, Thandwe, Pathein, Mawlamyine, Myiek, and Kawthaung, are either being constructed or upgraded to handle greater volumes of traffic. It is important for India to quickly expand its port facilities along the Eastern seaboard and establish strong linkages along the lines suggested by ERIA, starting with major upgrades of the Chennai and Ennore ports.

In the recent past, the Indian business community has started investing in Myanmar. In 2010, Tata Motors entered into a collaboration with Myanmar Automobile & Diesel Industries Ltd (MADI) to construct a heavy truck assembly plant in Magwe in central Myanmar<sup>26</sup>. The plant has now been operationalised and Tata Motors is expanding its footprint in Myanmar by entering into a distribution agreement with Apex Greatest Industrial Co Ltd. (AGI), Myanmar, for the distribution of commercial vehicles and passenger cars in Myanmar<sup>27</sup>.

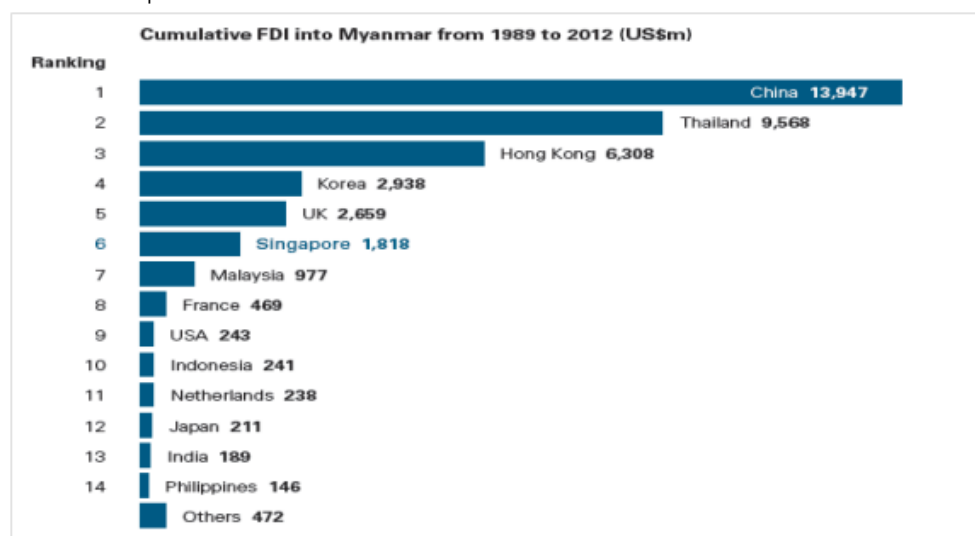
A large contingent of Indian businesspersons accompanied the Prime Minister of India to Myanmar in May 2012. During the visit, Jubilant Oil & Gas Private Limited, India, which had acquired onshore natural

gas blocks in the Irrawaddy delta in 2011, entered into a Production Sharing Contract (PSC) with Parami Energy Development Company Limited (Parami) and Myanmar Oil & Gas Enterprise (MOGE). Since the Prime Minister's visit, Indian company JK Paper entered into an MOU with Myanmar's state owned Thar Paung Paper and Pulp Mill to pick up equity and also to operate, expand and export the produce from the mill<sup>28</sup>. It should be noted that in the coming years, Indian companies will have to face intense competition not only from Chinese firms but also from Japanese, Korean and western firms eager to explore opportunities in the natural resource rich Myanmar economy.

### Growing Engagement of Japan, Thailand and Others

In the past, Japan's trade and investment with Myanmar were constrained by economic sanctions and the autarkic economic policies of the Myanmar regime. During the period 1988-2010, Japan accounted for less than one per cent of international investment in Myanmar. In the past two years, Japan has been making sustained efforts to scale up its engagement. Japan's trade with Myanmar has registered a significant increase, with exports doubling to \$492 million in 2010<sup>29</sup>. There is anticipation that Japanese investments will also witness significant increases as infrastructure deficiencies are resolved. Japan has waived \$ 3.7 billion of \$6 billion in debt owed to it by Myanmar<sup>30</sup>. Further, the Japan Bank for International Cooperation has provided Myanmar with a bridging loan of \$ 900 million to pay off some of its debt to the World Bank and the Asian Development Bank<sup>31</sup>. Japanese financial institutions such as the Mitsubishi UFJ Financial Group Inc will be playing an important role in disbursing Japan's financial assistance and are seeking to collaborate with local entities such as Myanmar's Co-operative Bank Ltd<sup>32</sup>. Japan is also actively involved in developing urban infrastructure facilities, such as water supply and sewage systems in Yangon, under Japan's International Cooperation Agency (JICA) financing<sup>33</sup>.

Japan's Deputy Prime Minister and Finance Minister, Taro Aso, visited Myanmar in January 2013, which was the first overseas visit by a senior cabinet minister after Shinzo Abe's Liberal Democratic Party (LDP) government took office. The visit signalled the importance of Myanmar in Japan's Southeast Asian policy. Aso visited the site of the Thilawa Special Economic Zone, reiterating Japan's commitment to large scale industrial infrastructure projects in Myanmar. The Thilawa project has been termed as the "centre-piece of Japan's investment in Myanmar" and it comprises a 2,400-hectare special economic zone and an industrial park with an estimated cost of \$ 12.6 billion, which will include a 500 megawatt power plant at a cost of \$900 million<sup>34</sup>.



Source: "Myanmar Business Guide," Report of Pricewaterhouse Coopers, August 2012, available at [http://www.pwc.com/sa/en/assets/document/myanmar\\_business\\_guide.pdf](http://www.pwc.com/sa/en/assets/document/myanmar_business_guide.pdf)



Similarly, Thailand has been keen to develop the Dawei Special Economic Zone (SEZ) in the Tanintharyi Region of Myanmar. When the Dawei project ran into financial trouble, Thailand invited Japan to become a partner in the development of Dawei SEZ<sup>35</sup>. Reportedly, Japan has already extended support for the project by advancing soft loans, which would be used for construction of port and road infrastructure<sup>36</sup>. This indicates that the countries in the region are comfortable with Japan's growing economic engagement in Myanmar, which is aimed at integrating Myanmar with production networks of Southeast Asia.

Thailand is the second largest investor in Myanmar with an estimated investment of some US \$9 billion during 1989-2012<sup>37</sup>. A significant component (appx 80-90 percent) of Thailand's investment has been in the energy sector<sup>38</sup>. Thailand's state owned Energy Company PTT, which has already made significant investments, is planning to invest an additional \$ 3 billion<sup>39</sup>.

The other major player in Myanmar's economic landscape is South Korea, which is the fourth largest investor. While companies such as Daewoo have been operating in the energy sector, South Korean companies are now seeking to diversify their investment portfolio by investing in sectors such as communications, vehicles and auto parts and mining<sup>40</sup>.

Finally with the suspension/lifting of sanctions, companies from the West are actively exploring investment opportunities in Myanmar<sup>41</sup>. While companies such as Chevron and Total have been operating for sometime, others such as British Petroleum and Royal Dutch Shell are considering investments in Myanmar. To distribute its products in Myanmar, PepsiCo has signed an agreement with Diamond Star Co., Ltd., and is also exploring investments in the agricultural sector<sup>42</sup>. In the coming months and years, there is going to be intense competition among various international actors to gain economic leverage in resource rich Myanmar.

## Conclusion

Late mover's disadvantage, difficult terrain and differences in administrative and political cultures have been some of the reasons for delays in Indian projects in Myanmar. Nonetheless, it would be no exaggeration to state that these delays in connectivity projects are costing India not only economically but also in terms of political and social goodwill. Expeditious implementation of connectivity projects between India and Southeast Asian countries starting with Myanmar is today a strategic imperative for the success of the LEP.

As India collaborates with Myanmar to complete various connectivity projects, it will be important to include social sector programmes targeting co-development along the border as an integral component. Connectivity projects and attendant movement of people may result in emergence of new fault lines such as intensification of 'insider-outsider' discourse<sup>43</sup>. Increased interactions may not only influence economic situations, but may also alter people's conceptions of their communities. Therefore, there is a need to map and prepare the local communities in Northeast India and in Myanmar to face challenges that they may encounter due to increase in trade and economic activity in coming years. To be effective and sustainable, any such preparation must involve active consultation and participation of civil society and of local communities along the India-Myanmar border.

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Please note the maps in this document may not be the scale.

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