

SHARES community survey

Key findings

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IFPRI

Agri-Food Value Chain Development (AVCD)

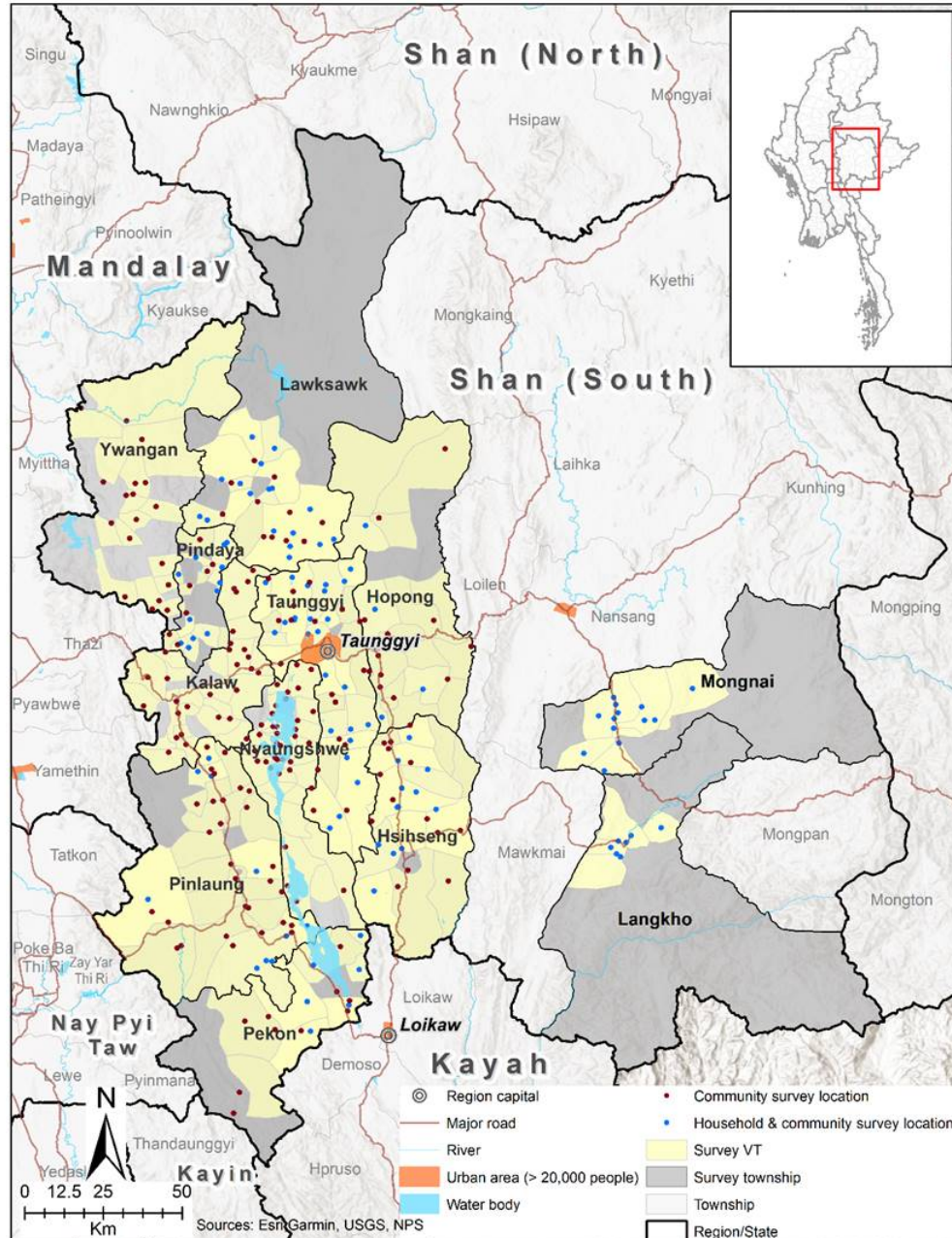
December 11, 2018



INTRO

Sample

323 villages in Southern Shan State



Township	# villages	% of villages
Hopong	21	6.5
Hsihseng	35	10.8
Langkho	7	2.2
Lawksawk	27	8.4
Mongnai	12	3.7
Pekon	22	6.8
Pindaya	17	5.3
Pinlaung	46	14.2
Taunggyi	44	13.6
Kalaw	33	10.2
Nyaungshwe	41	12.7
Ywangan	18	5.6

INTRO

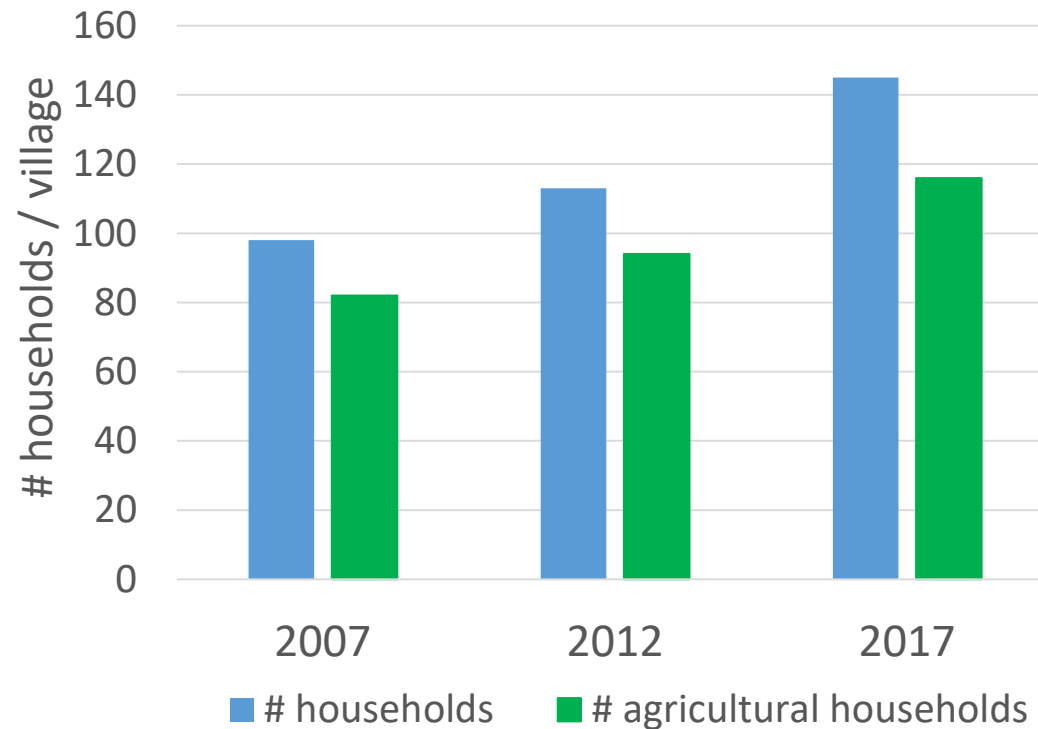
Sample

Administration	# villages	% of villages
General Administration Department (GAD)	211	65.3
Pa'O Self-Administered Zone	74	22.9
Danu Self-administered Zone	33	10.2
Shan State Army	2	0.6
Other	3	0.9

Total of 19 different ethnicities in the sample:

- Villages contain 1 – 12 different ethnic groups (average 2)
 - Pa'O, Shan and Burmese
- + Danu, Taungyoe, Kayan, Innthar, Lahu, Palaung, Kayin, Li Sue ...
- One third of communities has households with mixed ethnicities

SETTING population

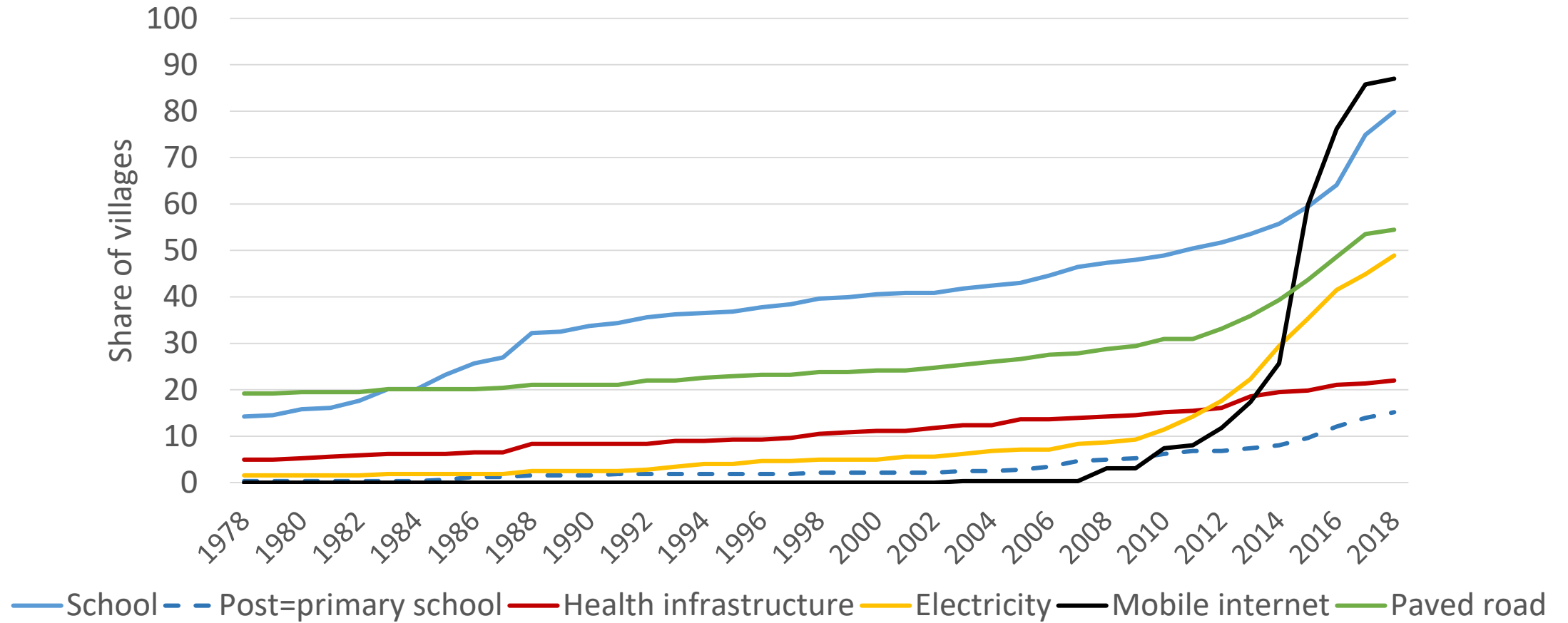


73% of villages had a population growth of >30% in the past ten years:

Reasons for population growth (>30%)	% of villages
Natural population growth	74
Division of extended households	74
Refugees from Shan	10
Migrants from Dry Zone	5

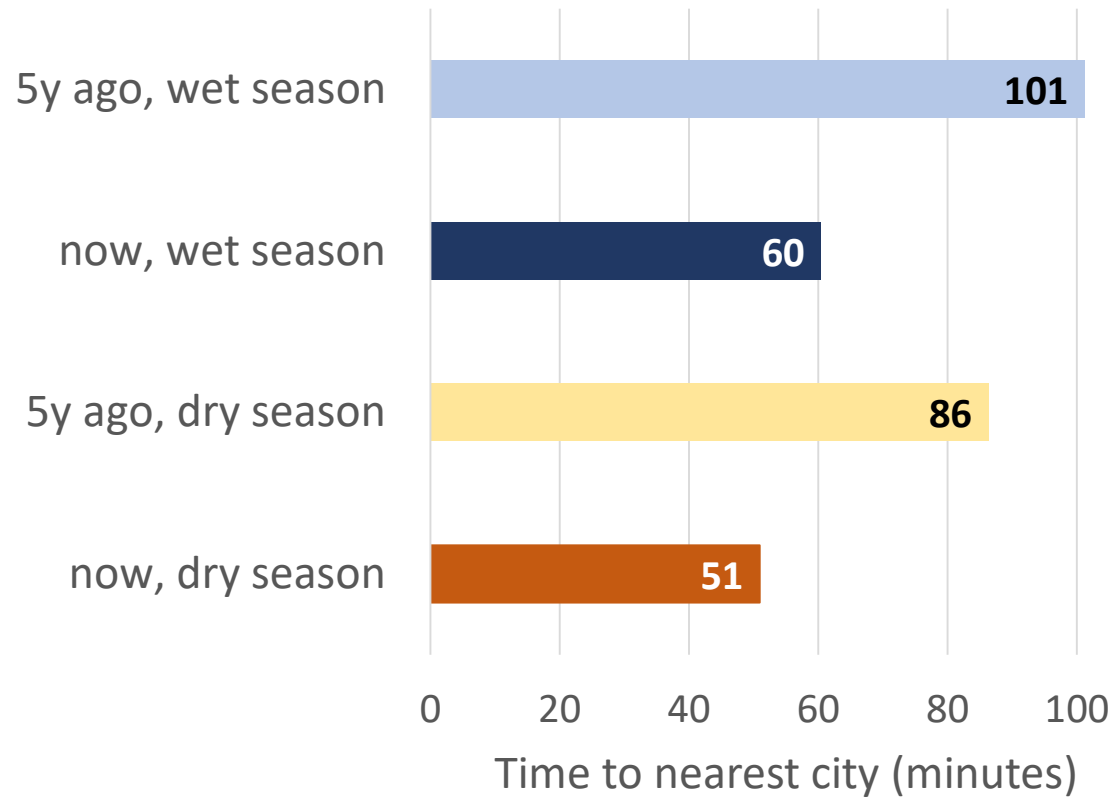
SETTING

Infrastructure



SETTING

Village access



- (a) Due to better roads
- (b) Change in main mode of transport



41% five years ago
→ 87% now



20% five years ago
→ 1% now

SETTING

Large improvements in infrastructure over the past 10 years, but there's room for improvement:

- **54%** has access to paved road
 - > **Dry Zone: 75%**
- **24%** has access to public electricity
 - > **Dry Zone: 35%**
- **4%** has a permanent market, **8%** a temporary market
- **22%** has a health facility (either clinic, rural health center or maternity ward)

...



AGRICULTURE

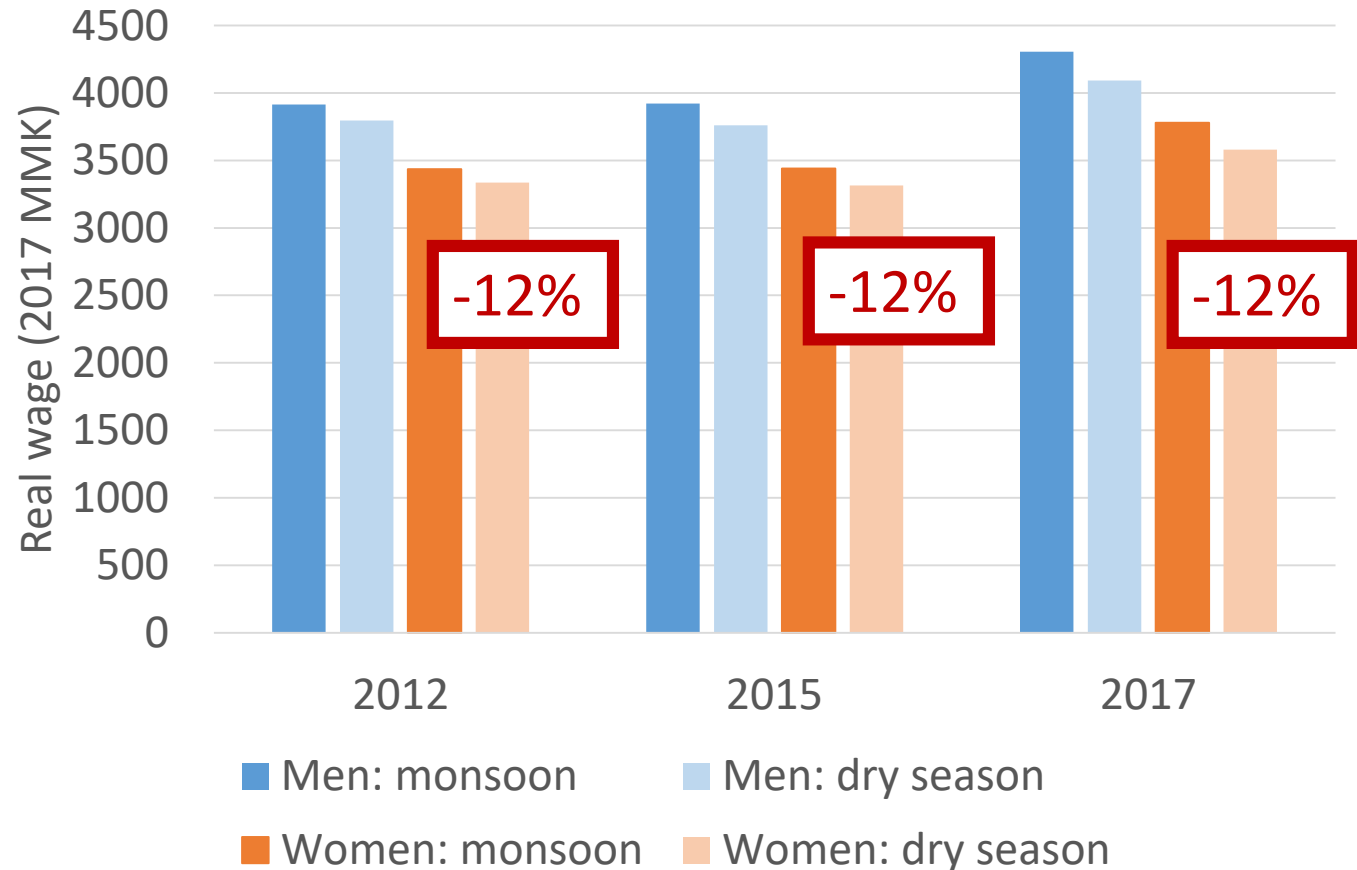
Rural wages

No significant changes in real agricultural wages over time

-> *Dry Zone: ± 40% increase from 2012-2016*

Gender gap is smaller than other regions of the country: women earn on average **12%** less than men in the monsoon season

-> *Dry Zone: 20% gender wage gap*



AGRICULTURE

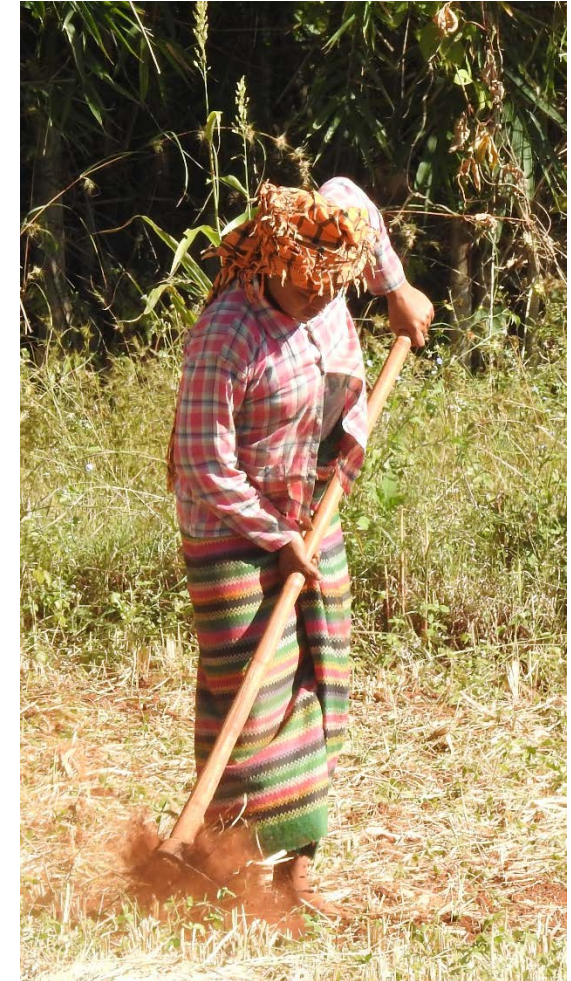
Agricultural wage migration

Few villages hire agricultural wage migrants, little change over time.

These villages have relatively high wages

In 2017:

- Migrant agricultural workers were hired in only 11% of all villages
- Farmer contact laborers directly (89% of cases)
- Migrant workers typically come from Shan state (86%), ethnic profile is similar as their occurrence in the region
- Half of these migrant workers are men
- They typically stay a few months (83%) or weeks (19%)
- Farmers generally earn the same wage as the local workers (78%)

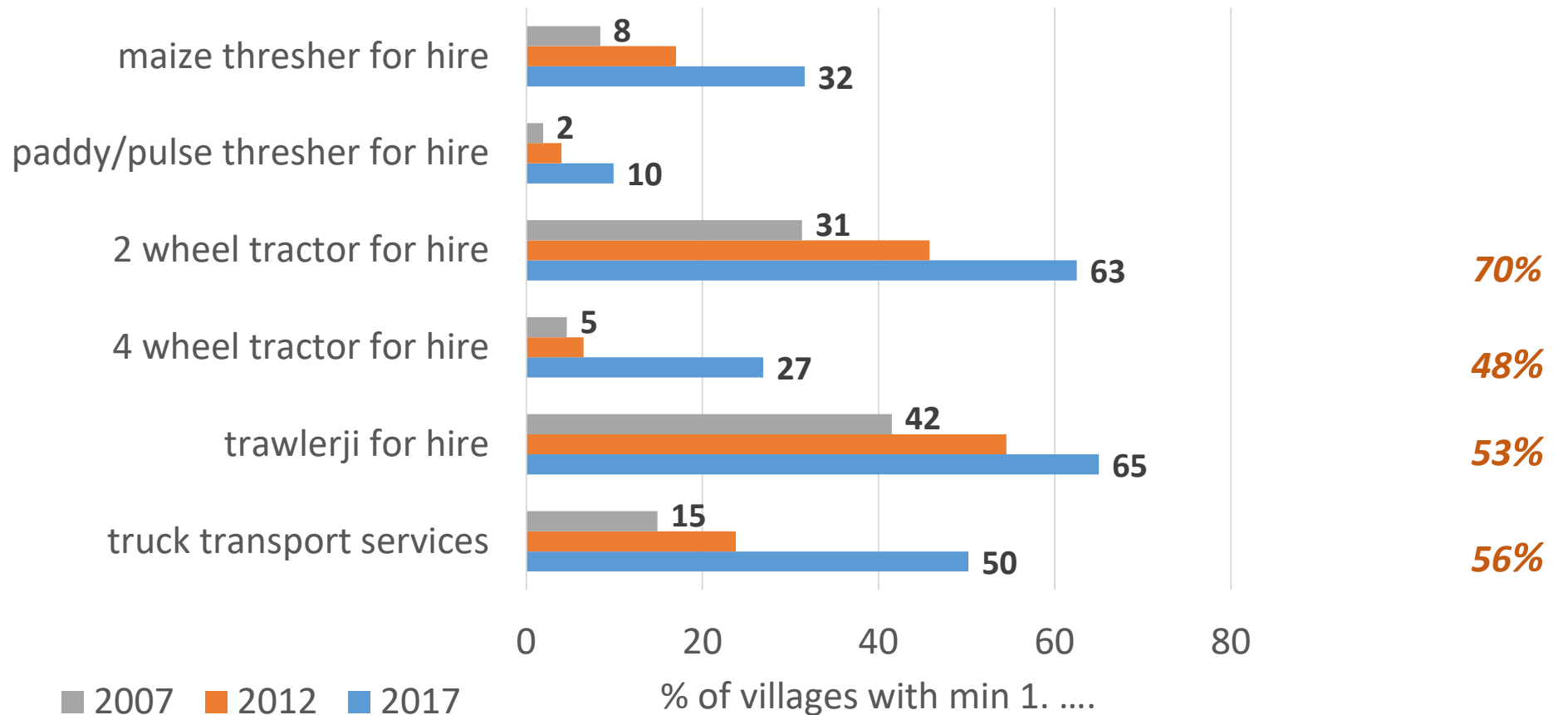


ENTERPRISES

Rental of agricultural machinery

Shan

*Dry Zone ***

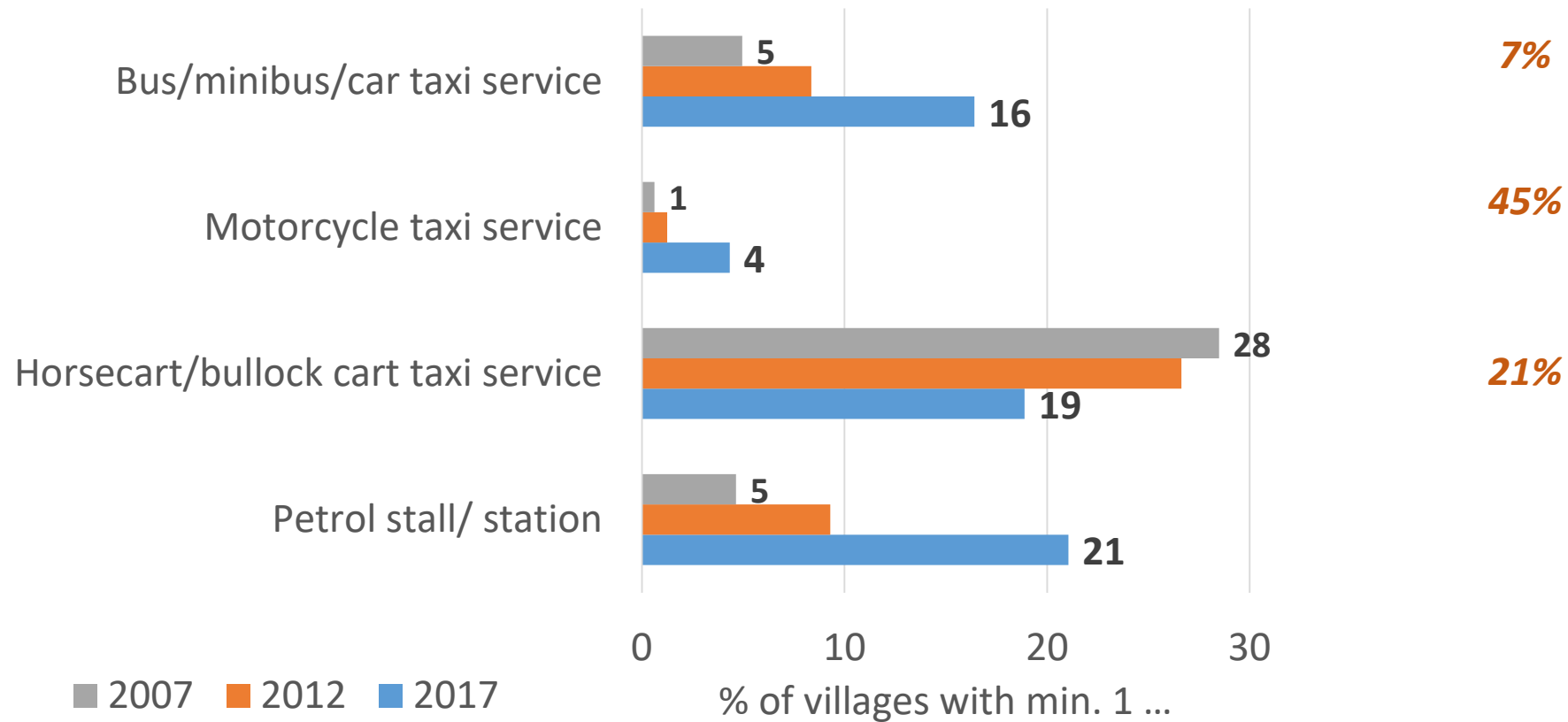


ENTERPRISES

Non-agricultural enterprises

Shan

*Dry Zone ***

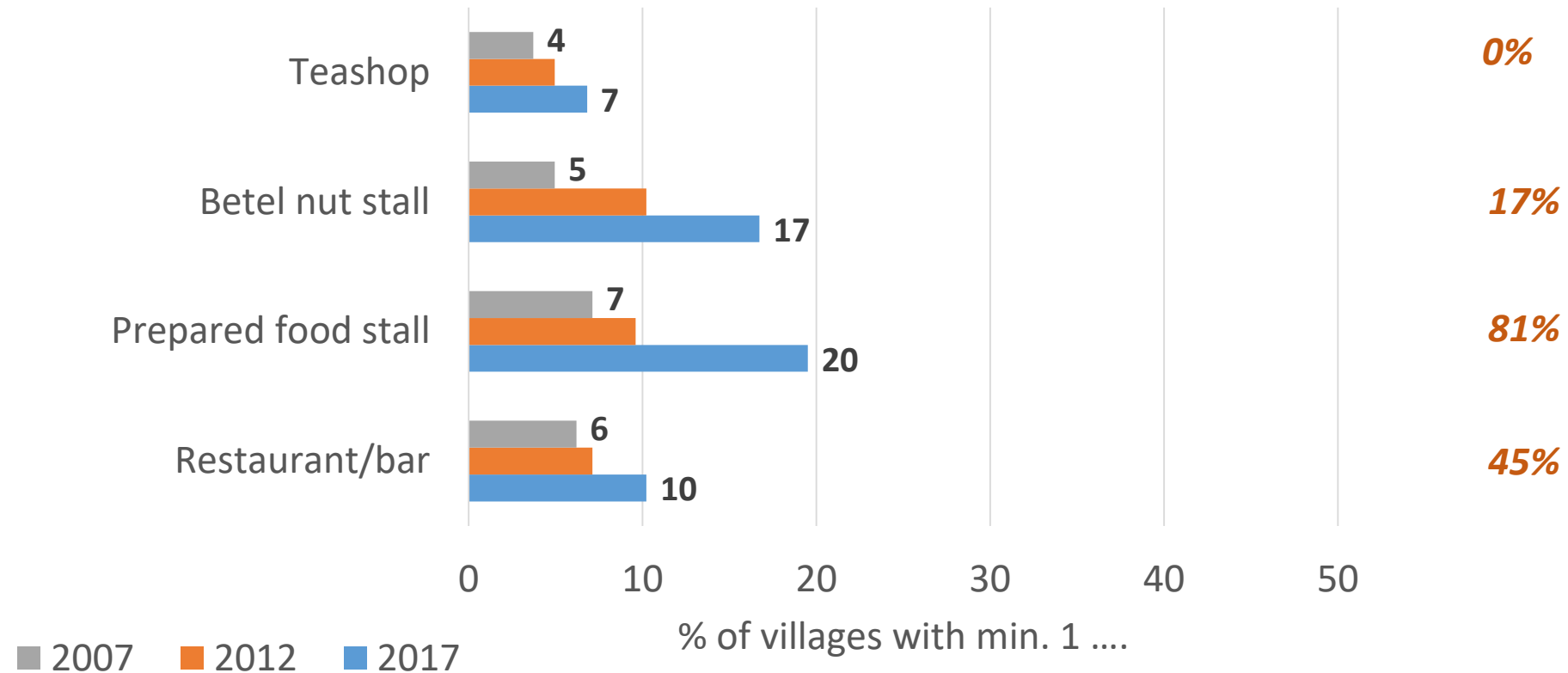


ENTERPRISES

Non-agricultural enterprises

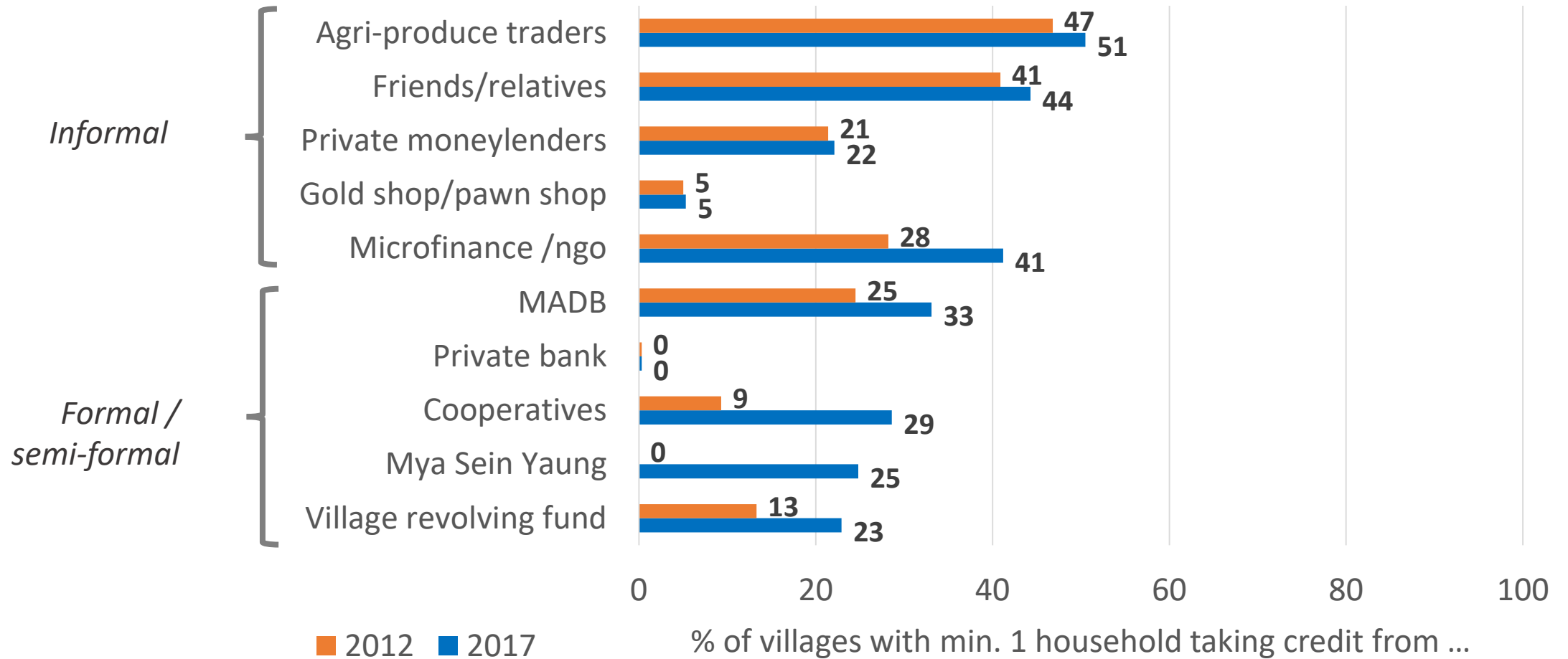
Shan

*Dry Zone ***



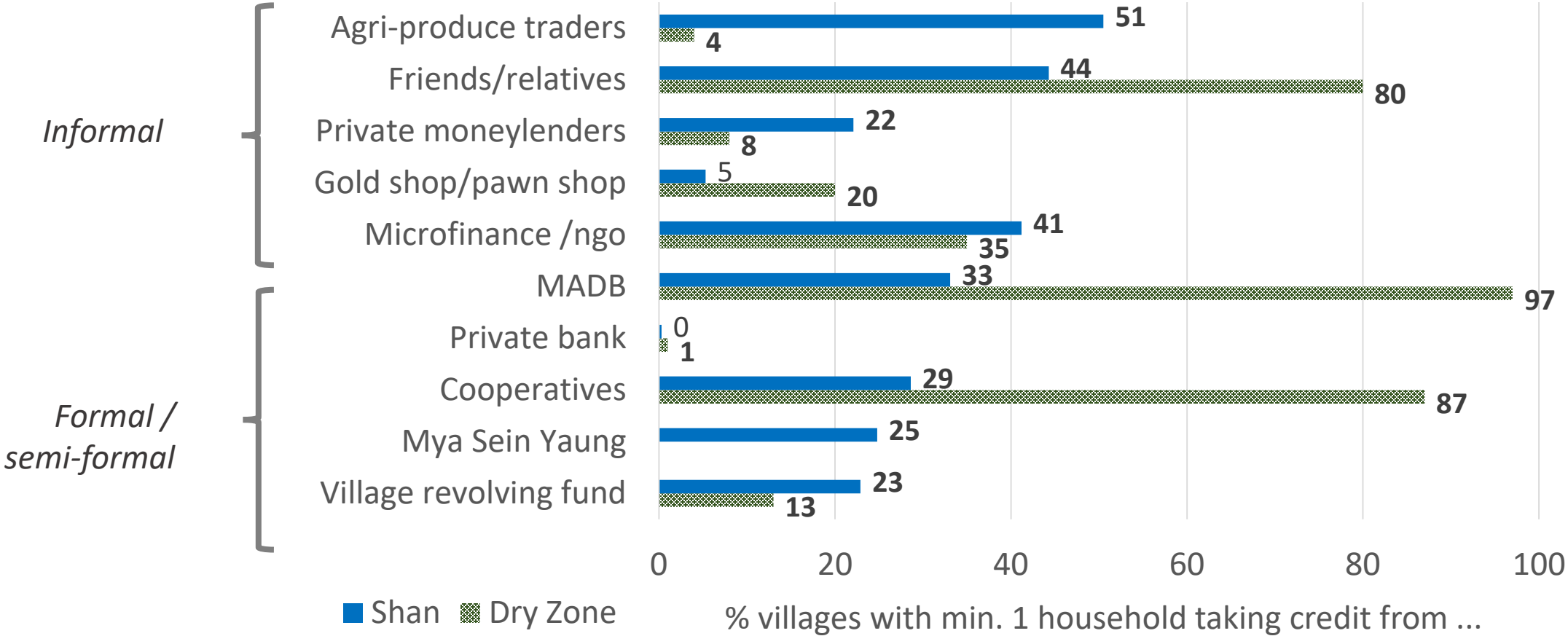
ENTERPRISES

Credit



ENTERPRISES

Credit: Shan vs. Dry Zone



ENTERPRISES

Credit

	Interest rate in 2012 (monthly)	Interest rate in 2017 (monthly)	Change from 2012 to 2017	Average year first available
<i>Informal</i>				
Agri-produce traders	5.24	4.42	-0.82	2002
Friends/relatives	4.44	3.82	-0.62	n/a
Private moneylenders	7.45	6.06	-0.61	n/a
Gold shop/pawn shop	3.96	3.38	-0.58	n/a
Other	1.10	1.96	-0.86	n/a
<i>Formal / semi-formal</i>				
Microfinance /ngo	2.36	2.32	-0.04	2008
MADB	0.42	0.67	0.25	2005
Private bank	1.08	1.08	0.00	1990
Cooperatives	1.67	1.56	-0.11	2013
Mya Sein Yaung	n/a	1.20	n/a	2016
Village revolving fund	3.91	3.18	-0.73	2007

RESILIENCE

Climate change

Shifts in mean temperature: 96%

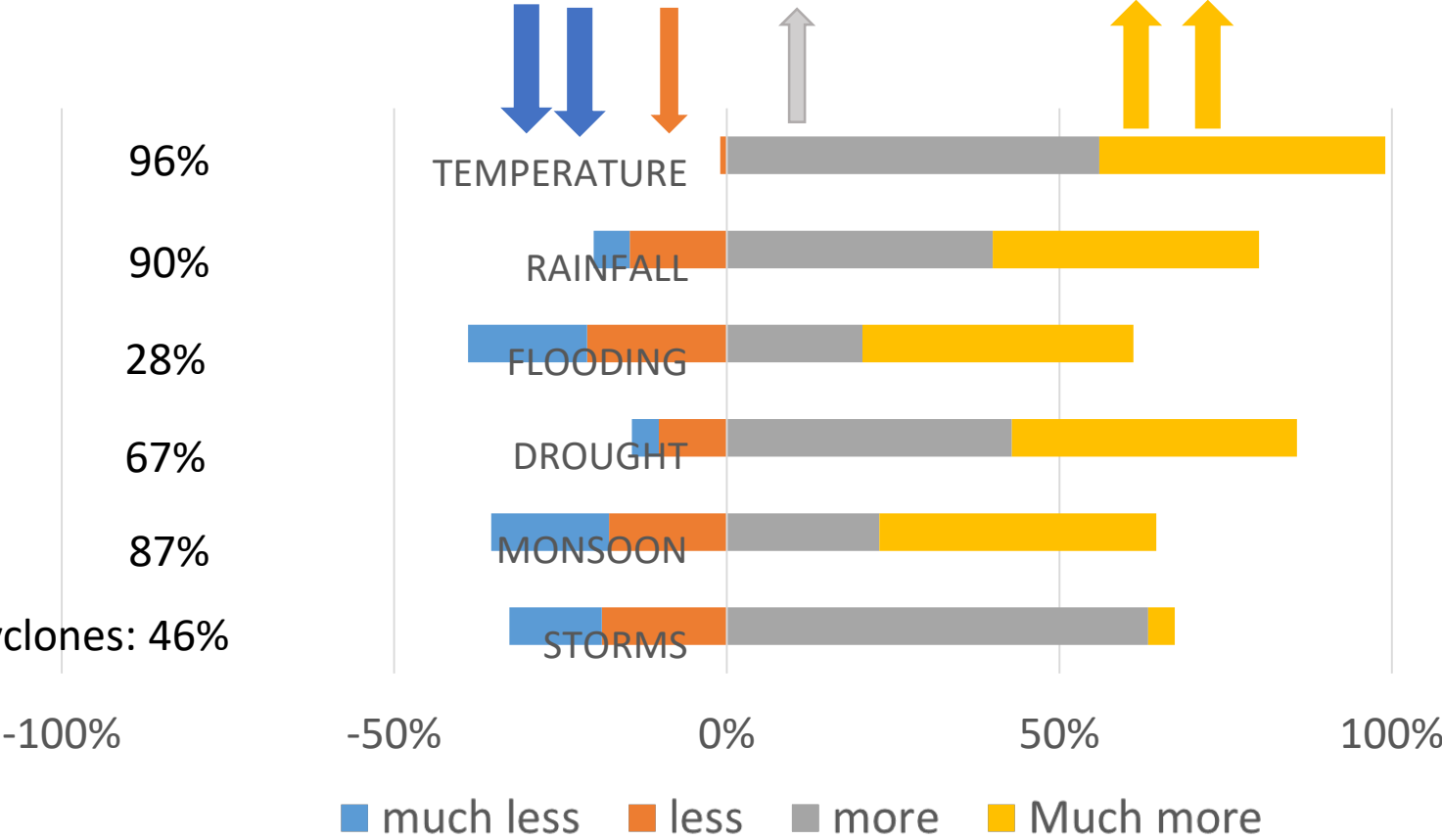
Shifts in mean rainfall: 90%

Shifts in frequency of flooding: 28%

Shifts in frequency of drought: 67%

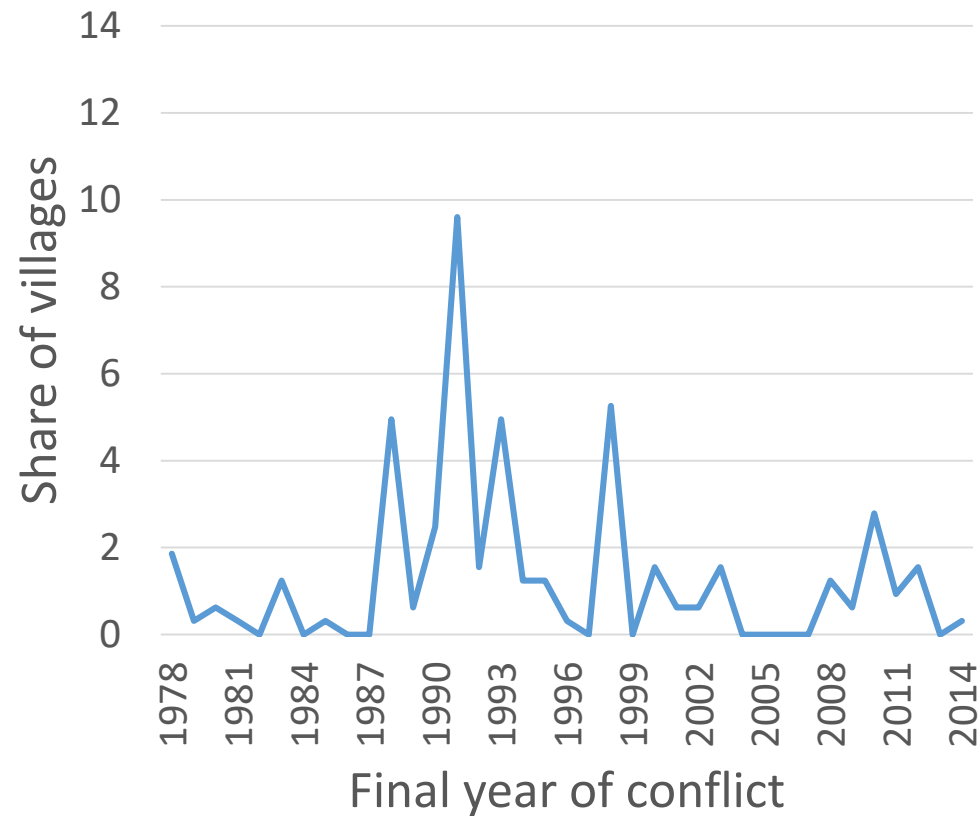
Shifts in onset of monsoon: 87%

Shifts in frequency of storms / cyclones: 46%



RESILIENCE

Conflict



Half of all villages (53%) ever experienced armed conflict

- 25% experienced conflict in the last 25y
- 7.5% experienced conflict in the last 10y
- 1% experienced conflict in the last 5y

Consequence for households in these villages:

- Forced to work as laborers or porters: 87%
- Livestock killed / stolen: 28%
- Forced to relocate : 19%
- Housing damaged / destroyed: 9%
- Crops destroyed / stolen: 4%

RESILIENCE

Social capital

Very few farmer groups, the existing ones are small and recent.

	% of villages with...	Year established	# members
	association		
Any farmer organizations in this village	7.1	2015	29
NGO farmer group	3.4	2015	31
Central Cooperative Society	0.6	2015	37
Myanmar Farmers' Association	0.3	2013	5
Other	3.1	2015	30

RESILIENCE

Development assistance

High project coverage in the past 10 years

- 66% of villages had min. 1 government project
- 57% of villages had min. 1 NGO project
- 15% of villages did not have any project

On average, governmental projects were established later compared to NGO projects:

- 9/10 government projects were initiated after 2011,
- 6/10 NGO projects were initiated after 2011

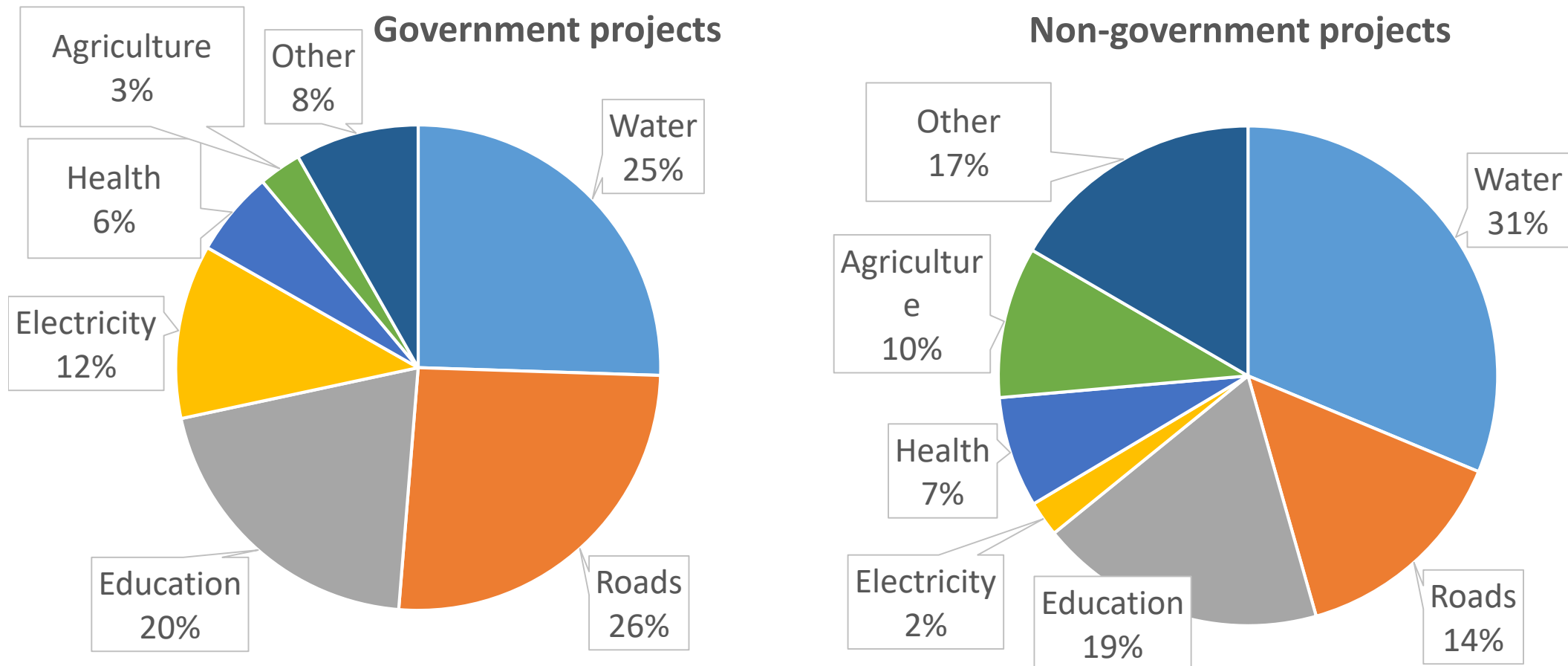
On average, governmental projects are less likely to take place in more remote areas:

- 69% of villages in distance to town tercile 1 and 2 vs. 58% of villages in tercile 3
- No significant difference for NGO projects

RESILIENCE

Development assistance

High government and non-government project coverage, but mainly infrastructure projects



IMPLICATIONS

(1) Shan is different

- Contrast with other parts of the country: wages, credit, rural enterprises, ethnicities, agro-ecology ...
- Much more agriculture-based economy

(2) Type of interventions

Much emphasis on 'hardware', what about 'software'?

- Exception: health infrastructure
- Farmer groups, agricultural interventions, climate change adaptations ...
- Health and nutrition, teacher training, capacity building ...

(3) Restricted access

- Nationally- or regionally- representative surveys?
- Situation is likely worse than reported
- What is the potential for focus of new interventions and research in Shan and similar areas?

Thank you!

