

## (II) Myanmar's Economic Relations with China and India

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### Introduction

In 2011, the almost 50-year-long military rule in Myanmar ended and a reformist government came to power. However, along with that profound change, Chinese investments in the country dropped significantly from 12 billion US dollars in 2008 to only 407 million US dollars in 2012/13.<sup>1</sup> How can this drop be explained, and is Myanmar's growing confidence leading to a turn away from old partners and towards new, seemingly less overpowering ones? These circumstances will be discussed in this chapter and can be explained by answering the central question: What is the influence of India's and China's development strategies on Myanmar?

Starting with an introduction of both India's *Look East Policy* and China's *Go West Strategy*, the chapter continues with an overview of Myanmar's economic linkages to China and India, with a focus on its border regions of Northeast India and Yunnan. Finally, two case studies namely the Sino-Myanmar Oil and Gas Pipeline and the Letpadaung Copper Mine illustrate the scope of China's and India's engagement with Myanmar and the changing nature of Myanmar's position towards these two partners.

### 1 India's and China's development strategies

In order to gain a better understanding of the behavior of both the Chinese and the Indian government in the regions bordering Myanmar, it is useful to take a look at the countries' development strategies. In the recent years, China has given greater leeway in economic matters to its provinces in the West under the *Go West Strategy*.<sup>2</sup> In India, too, there is now greater attention being paid to connecting India's *Look East Policy*, originally a foreign policy initiative to foster economic relations, with Southeast Asia.<sup>3</sup> In a next step, both of these strategies will be compared.

#### 1.1 India's 'Look East Policy'

The 1990s was a period witnessing rapid economic development and growth of Asian countries. Southeast Asia came to be recognized as a region with vast economic potential and the Indian subcontinent was fast emerging as an economic and political force to be reckoned with. This is when the Indian leadership, under the then Prime Minister P. V. Narasimha Rao, launched the *Look East Policy (LEP)* in 1991/92. It is an economic and foreign policy of engagement with Southeast Asia, seeking to create and expand regional markets for trade, investments and industrial development. India also began strategic and military cooperation with countries concerned by the expansion of China's economic and strategic influence. Thus, from the very beginning, India's strategy has focused on forging close economic and commercial ties as well as increasing strategic and security cooperation.<sup>4</sup>

One aspect of the *LEP* aims – which up to now has not been achieved – is the creation of Northeast India as an economic hub. Especially after the inclusion of Myanmar into ASEAN as full member in 1997, the development of physical connectivity between Northeast India and Southeast Asia has been seen as a prerequisite for further economic development. Thus the Indian government pays greater attention on enhancing connectivity through all possible modes of infrastructural development, such as land routes, railways, air connectivity, energy infrastructure development both in field of hydroelectric, and hydro-carbon and telecommunication linkages.<sup>5</sup>

1 Sun 2013: 1.

2 China's western region encompasses the municipality of Chongqing, the provinces of Yunnan, Guizhou, Qinghai, Sichuan, Gansu and Shaanxi, and the autonomous regions of Tibet, Xinjiang, Ningxia, Inner Mongolia and Guangxi.

3 Northeast India comprises the so-called *Seven Sister States* of Assam, Meghalaya, Tripura, Mizoram, Manipur, Nagaland and Arunachal Pradesh, with Sikkim later joining as the eighth state.

4 Rahmann 2013.

5 Ibid.

## 1.2 China's 'Go West Strategy'

In the two decades since the end of the 1970s, most of China's rapid economic growth occurred in the East and Southeast coastal regions. This was a result of these regions' better natural endowment, basic infrastructure, favorable human resources and especially massive inflows of foreign capital.<sup>6</sup> Consequently, China has been characterized by great regional disparities.<sup>7</sup> The Chinese government, however, has not reversed its preferential policies until the end of 1999 when the new *Go West Strategy* was launched. Five areas have been singled out as development priorities: the construction of major infrastructure projects, the improvement of the ecological environment, economic restructuring, the promotion of science and education, and the further opening of the region to the outside world.<sup>8</sup>

As a gateway into Southeast Asia, Yunnan started to develop transnational linkages in the early 1980s and trade along its southern border has continued to grow ever since.<sup>9</sup> Since then the province has a long and active history of transnational linkages and it has been acting as the interface for China with Myanmar and the countries of mainland Southeast Asia respectively.<sup>10</sup> Currently, trade between China and Myanmar occurs mainly along the border of Yunnan and Myanmar's Shan and Kachin states. In 2005 the Governor of Yunnan Province declared in a meeting with Myanmar's Prime Minister that Yunnan had an important role to play in further strengthening Sino-Myanmar relations.<sup>11</sup>

## 1.3 Comparing both strategies

The main difference between China's *Go West Strategy* and India's *LEP* is that the former originated as an internal development program targeted at China's large western region while the latter began as a foreign policy strategy to enable the Indian government to reach out to Southeast Asia. In contrast to China, India does not have a comparable Northeastern development strategy in place, even the *LEP's* focus towards the Northeast is of recent nature and far from being a coherently-articulated strategy. However, both governments have realized that their strategies cannot be run in isolation from the adjacent states and from domestic imperatives.<sup>12</sup> Furthermore, the provincial government of Yunnan plays a far more active role in China's efforts to build bridges with Southeast Asia than the Northeast Indian states. According to political scientist Sanjib Baruah, "this is no minor irony since China's political system is centralized and authoritarian while [India's] is democratic and federalized."<sup>13</sup> The strongest similarity between the two strategies is their focus on improving transport and communication links between the respective country and its peripheries in order to support economic development. Moreover, a well-developed infrastructure is also a prerequisite for establishing stronger ties with Southeast Asia.

## 2 Myanmar's economic relations

### 2.1 Myanmar as a recipient of foreign direct investment (FDI)

Within the ASEAN region Myanmar plays a minor role as a receiver of FDI. Although the inward FDI flows increased nearly tenfold from 251 million US dollars in 2004 up to 2 243 million US dollars in 2012,<sup>14</sup> the inward FDI stock as a share of GDP is rather low compared to other ASEAN member states. In 2012, Myanmar's inward FDI stock accounted only for 20,62 percent of GDP, which is the second lowest ranking within the ASEAN states. With regard to the latter the Asian Development Bank found out that Myanmar's openness towards FDI is even constantly falling since 2004.<sup>15</sup>

6 Tian 2004: 611.

7 Goodman 2004: 318; Lai 2002: 432.

8 Tian 2004: 622.

9 Jakob 2010: 134.

10 Summers 2012: 447-448.

11 Jakob 2010: 135.

12 Ibid. 128.

13 Baruah, quoted in Jakob 2010: 129.

14 UNCTADSTAT 2013.

15 ADB 2014.

Even though the international comparison shows a minor role of Myanmar concerning FDI inflows, it is nonetheless important to break down the distribution of FDI inflows by country. Noticeable is the concentration of FDI coming from adjacent neighbors like China and Thailand or other countries from the Asian region like Hong Kong, Korea, Singapore, Japan and Vietnam. Here, it is unusual that India's contribution of FDI to Myanmar is rather insignificant, although it is comparable with China regarding economic size and population. In 2011, the major part of foreign investment of permitted enterprises came from China with a total amount of more than 4.3 billion US dollars, which is nearly sixty times higher than that of India with a foreign investment of 73 million US dollars.<sup>16</sup> However, even with such low FDI India managed to be the third largest investor in 2011. In 2012, China remains the highest investor, but with 407 million US dollars it only reaches less than one tenth compared to the previous year. In the same time India's FDI was reduced down to 2 million US dollars. The top ranking of the United Kingdom as third highest investor with 233 million US dollars is partly due to the high investments from the British Virgin Islands whereby the exact origin of the investors is uncertain. This is why the official investment of China might actually be understated due to transactions in example via Hong Kong or the Cayman Islands.<sup>17</sup>

China's massive investment into Myanmar is a result of the growing demand for energy and resources like gas and oil. Nonetheless, this import diversification is not only a strategy to sustain the high growth levels of the past but also to connect the western provinces like Yunnan to its neighbors.

The main sources of FDI inflows into Myanmar are projects in the extractive and energy industries and in which China is predominantly involved in the investment. Prominent projects are the Shwe oil and gas pipeline, which helps to circumvent the detour along the Strait of Malacca, or the Letpadaung copper mine, which holds the largest copper deposit in Southeast Asia.<sup>18</sup> Beside these two sectors, hydropower is a major destination of FDI. About two-thirds of the energy capacity that is installed in Myanmar comes from hydroelectric dams and finds its way as energy exports crossing the border to Yunnan.

## 2.2 Myanmar's trade linkages

To explain Myanmar's international interconnectedness with regard to trade, it is important to not just look at the trade patterns itself but also at the proportion of cross-border trade. The geographical proximity to China and India could lead to the assumption that the trade between Myanmar and these two giant economies is comparable. However, the economic strength of India is barely measurable at the over 1 600 km long shared border.

According to the Myanmar Ministry of Commerce, only two official border trade areas exist between India and Myanmar, three at the border to China, four with Thailand and two with Bangladesh.<sup>19</sup> However, these official trade areas are only monitoring the legal trade but neglect the transfer of illegal goods like drugs and weapons or the goods that are smuggled apart from the official roads.

Regarding cross-border trade China is the biggest trading partner for Myanmar. In 2009, about 38 percent of China's total trade took place at the 2 185 km long border and accounted for 1 076.8 million US dollars. Thailand is the second-largest border trading partner with 274.7 million US dollars. Due to a lack of infrastructure and political instability in the Northeastern regions of India the border trade is the lowest with only 13.7 million US dollars. This accounts for only 1 percent of India's total trade with Myanmar and puts India even behind Bangladesh, which traded goods for more than 18.4 million US dollars.<sup>20</sup>

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16 MNPED.

17 OECD 2014: 56.

18 Ibid. 58.

19 DCCA.

20 Htun et al. 2011.

### 3 Myanmar: A center for rivalry over natural resources between India and China

#### 3.1 The Sino-Myanmar oil and gas pipelines

After a long time of negotiation and construction work, both the Sino-Myanmar oil and gas pipelines have started operating in 2013. The construction of the oil and gas pipelines started in 2010 after an agreement has been signed between the China National Petroleum Company (CNPC) and the Myanmar Oil and Gas Enterprise (MOGE) in 2009. The gas pipeline begins at the offshore natural gas terminal and runs 793 km through Myanmar before entering China at the city of Ruili in Yunnan province. The crude oil pipeline also leads into Yunnan and ends in the metropolis of Chongqing.<sup>21</sup> For almost the entire distance across Myanmar it runs parallel to the gas pipeline.<sup>22</sup>

##### 3.1.1 The Shwe gas field and the Sino-Myanmar gas pipeline

The Shwe natural gas fields, which are situated in the Andaman Sea in the West of Kyaukpyu, consist of three independent gas discoveries: The Shwe, Shwe Phyu and Mya fields. For about two years the gas discovered in the Shwe gas fields was presumed to be destined for India.<sup>23</sup> A pipeline was supposed to be built through Bangladesh to deliver gas for Indian consumption. To seal the deal, India would have to give way to specific economic demands which Bangladesh proposed if a pipeline was to cross their territory.<sup>24</sup> India was not able to compromise on those demands and tried to explore alternative options, but in the end could not offer Myanmar a route for the pipeline. Due to the ongoing armed conflict in Northeast India, it was considered too expensive to let the pipeline run through their Northeastern territory.<sup>25</sup> At the end of 2005, the former military government signed a Memorandum of Understanding to sell the gas from the Shwe fields to the China National Petroleum Company which is a privately owned Chinese oil and gas company.<sup>26</sup> In June 2008 they signed an agreement which allows the export of 6.5 trillion cubic feet of natural gas to China for 30 years.<sup>27</sup> Although India missed out on building the pipeline, it is still involved in the overall project. The Shwe Consortium which represents the Shwe natural gas field ownership consists of five different stakeholders: Daewoo International (South Korea, 51 percent of shares), Oil and Natural Gas Corporation (ONGC Videsh Ltd., India, 17 percent of shares), MOGE (Myanmar, 15 percent of shares), Korean Gas Cooperation (KOGAS, South Korea, 8 percent of shares), Gas Authority of India Limited (GAIL, India, 9 percent of shares). Nevertheless, India, which is involved with two different companies, only holds 26 percent of shares in total. This is 33 percent points less than South Korea owns, who is also involved with two different companies. The stakeholders were responsible and paid for the development of the Shwe gas fields. In contrast, the ownership of the onshore natural gas pipeline looks quite different. Although it consists of the same stakeholders, plus the China National Petroleum Company, the shares of the different stakeholder differ significantly, with CNPC owning 51 percent of the shares.<sup>28</sup> In July 2013, the 14.2 million US dollars gas pipeline was completed and began to deliver natural gas to China's Yunnan province.<sup>29</sup>

##### 3.1.2 The Sino-Myanmar oil pipeline

Beside the gas pipeline, the CNPC has also built a crude oil pipeline which runs parallel to the gas pipeline. CNPC who also financed the pipeline owns 51 percent of shares while the MOGE owns the remaining 49 percent. The pipeline was built to transport oil from the Middle East and Africa to Southwest China.<sup>30</sup> Oil tankers carry the oil to Myanmar's port of Kyaukpyu. From here the pipeline is expected to transport about 22 million tons of crude oil every year.<sup>31</sup>

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21 Zhao 2011: 94.

22 Singh 2013: 6.

23 Zhao 2011: 92.

24 EarthRights International 2011.

25 Bhaumik 2013.

26 EarthRights International 2011: 1.

27 Zhao 2011: 92.

28 EarthRights International 2011: 3.

29 Radio Free Asia 2013.

30 EarthRights International 2011: 4.

31 English.news.cn 2013.

### 3.1.3 What's in for the stakeholders?

For China, the main reason to invest in both the oil and gas pipeline is to secure energy resources for its increasing demand. So far most of China's piped gas has been imported via the Strait of Malacca. The overland pipeline through Myanmar is an alternative to this import from the seabed which decreases the risk of gas shortages.<sup>32</sup> The newly built oil and gas pipelines are opening a fourth route for China to import oil and gas, after ocean shipping via the Strait of Malacca, the Sino-Kazakhstan crude oil and natural gas pipelines, and the Sino-Russian oil pipeline.<sup>33</sup> This fourth alternative route for energy import further improves China's strategy for energy diversification and reduces the cost for transportation.<sup>34</sup> CNPC states that the gas pipeline is expected to deliver 12 billion cubic meters of natural gas per year, which will reduce coal consumption by 30.72 tons and decrease carbon dioxide emission by 52.83 million tons per year.

Myanmar also profits from the increasing energy resources, but in comparison to China by a much smaller scale. The project is supposed to provide 2 million tons of crude oil and 2 billion cubic meters of natural gas annually. Additionally, the pipelines also provide numerous job opportunities for Myanmar's citizens. Nevertheless, the biggest benefit for Myanmar is the increased foreign investments, and revenues which it gains through taxation and transit fees. For Myanmar foreign investments are a major asset in developing the economy and improving the economic infrastructure after the political transition.<sup>35</sup>

The other stakeholders of the Shwe gas fields, namely Daewoo International, ONGC, MOGE, KOGAS and GAIL have their interest in gaining profits from the gas extraction. Although the Indian companies gain profits from the extraction of gas as well, there is also still an interest in keeping the Shwe gas fields a possible resource for serving their own energy security. Since relations between Delhi and Dhaka have been improving, India has requested Myanmar to start new negotiations on the pipeline.<sup>36</sup> Having a look at the current situation, it seems quite clear that India is losing out on the struggle for natural resources in Myanmar. This does not mean that it cannot become a serious competitor to China in the future, given that India keeps on following its track to deepen economic relations with Myanmar.

### 3.1.4 Critical voices and civil society movements

Since the pipeline project was launched, there have been different actors who raised concerns about the negative impacts affecting local citizens in Myanmar. The project is blamed to have caused land confiscations leading to forced resettlements. Thus, the resettled households lost their source of income by losing their land. Furthermore, the project was also highly criticized due to environmental concerns and that there have not been enough measurements to keep those negative impacts as small as possible.<sup>37</sup> In addition there are concerns that the whole project lacks transparency and mainly serves Chinese interests while Myanmar only receives a fractional amount of what it should receive. During the construction there have been protests in both countries, although the protests in China were mainly concentrated in Yunnan. In Myanmar there have been both local protests against inadequate compensation for land and unfair salaries for local workers, as well as larger protests to express concerns over environmental and socioeconomic effects. The Shwe Gas Movement, an international NGO based in Thailand tried to raise awareness on the environmental and social concerns. Its activists organized and covered protest movements and actions both in China and Myanmar. Despite these protests the project was completed without making compromises or changing the conditions stated in the contract. The civil society groups had no chance in changing the project's conditions mainly due to a lack of resources. Nevertheless, there are still some civil society groups in Myanmar that support the concerns of local citizens and try to help them claiming their rights.<sup>38</sup>

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32 Song 2013; Singh 2013: 6.

33 Zhao 2011: 95.

34 Singh 2013: 6.

35 English.news.cn 2013.

36 Bhaumik 2013.

37 Song 2013.

38 Radio Free China 2013.

### 3.2 The Letpadaung copper mine, bargaining and social protest

The Letpadaung copper mine displays the bargaining capacity of Myanmar's government towards Chinese investors and serves as an evidence for Myanmar's ability to defend its interests towards economically powerful China.

Letpadaung is a joint venture between Chinese Wanbao Mining Ltd.<sup>39</sup> and the military-owned Myanmar Economic Holdings (MEHL). Its total investment estimated 1.065 billion US dollars.<sup>40</sup> Wanbao carries all investments and operational risks and protects Myanmar's side from economic loss.<sup>41</sup> Final negotiations about the project took place in 2010 and ended by signing the agreement during a visit of the Chinese Premier Wen Jiabao. First construction works started in spring 2012. Nevertheless, the production stopped in June due to local protests against land grabbing and environmental pollution.<sup>42</sup> Three months later construction works continued despite the local protests until they stopped again in November 2012 due to heavy anti-Chinese protests. Myanmar's government brutally crushed down the protests.<sup>43</sup> However, mass protests pushed the government to make a detailed investigation in terms of negative ecological and social effects.<sup>44</sup> The investigation commission chaired by Aung San Suu Kyi concluded in March 2013 that the project can be continued. However, it stated that there should be a proper compensation for local farmers, transparency of the project as well as social and environmental impact assessments, which should be fulfilled before the production of the mine can be continued.<sup>45</sup> The international community was concerned with these problems as well. The Heinrich Böll Foundation asserted Wanbao Company for confiscating 7 800 acres of land from people of 26 villages and forced relocation of livelihoods by authorities in its report in June 2013. Moreover, the report states that Chinese investors are not conducting environmental and social impact assessments of the projects.<sup>46</sup> Wanbao's reaction to the report was a denial of these accusations. Wanbao claimed not to relocate people by force, but voluntarily and to compensate them higher than required by law.<sup>47</sup> Furthermore, Wanbao asserted to engage the international consulting company, Knight Piesold<sup>48</sup>, to update the previous environmental impact assessment and carry out a special impact assessment which was originally accomplished by the previous investors of Letpadaung.

Despite these facts, a 15-member high-level committee decided to revise the previous contract to raise the government's share of the project's profits. According to the previous agreement of 2010, Myanmar's government had 4 percent of the profits, MEHL 51 percent and Wanbao 45 percent.<sup>49</sup> It was mentioned that originally Myanmar's government got 16.8 percent of the shared profits.<sup>50</sup> Nevertheless, after the negotiations in July 2013, a new agreement was announced. The profit's share was changed in favor of Myanmar's government. It attained 51 percent of the benefits; MEHL received 19 percent and Wanbao 30 percent.<sup>51</sup> Moreover, 2 percent of net profits should be applied for corporate social responsibility in the areas of the affected communities. Additionally, Wanbao is committed to spend 2 million US dollars annually for development of environmental protection programs.<sup>52</sup> This is included in the Wanbao's leaflet which says that 2 million US dollars annually will be applied to ensure international standards of environmental protection. The environmental plan will be adjusted towards the future when the mine will eventually be closed.<sup>53</sup> Besides, there are other obligations made on the part of the Wanbao Mining.

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39 A subsidiary of China's state-owned China North Industries Corporation (NORINCO).

40 Sun 2013: 5.

41 Wanbao 2013a.

42 Sun 2013: 5.

43 Ibid. 6.

44 Ibid.

45 Ibid.

46 Khine 2013: 48.

47 Wanbao August 2013b.

48 Knight Piesold is an international consulting company providing engineering and environmental services for the mining, power, water, transportation and construction sectors. <http://www.knightpiesold.com/en/>.

49 Sun 2013: 6.

50 Than 2013: 27.

51 Ibid.; Wanbao 2013a.

52 Than 2013: 26.

53 Wanbao 2013a.

For example, some criteria for employment for the landless peasants were formulated. If a family living in one of the 26 affected villages loses up to 10 acres of land, 1 job per household will be provided. If there is a loss of more than 20 acres, the family is provided with 3 jobs per household. In other cases, solutions are made individually.<sup>54</sup> At present, Wanbao spends 1 million US dollars per year to invest in the local communities' infrastructure, such as the provision of electricity, healthcare or construction of roads and schools.<sup>55</sup>

In the meanwhile, the protests against Wanbao and the mining project of Letpadaung continue to challenge the production of the mine. People are concerned about the environmental impact of the Letpadaung mine. Some households were resettled but did not get enough compensation. Sulfuric acid coming from the factory that purifies copper for the mining project affects crops, soil, water and air, as well as destroyed the religious site of the mountain.<sup>56</sup>

What the case displays is that Myanmar's government basically is able to hold China responsible and to boost its own economic interests. Myanmar's government managed to improve the agreement conditions of the Letpadaung copper mine project and attained 51 percent of the benefits. Whether the government persists on bringing Chinese investors to conduct what they promised regarding environmental protection programs and accountability for local communities is still arguable and whether China will behave as a responsible investor and a promoter of sustainable economic development can only be seen in the future.

#### 4 Conclusion

Myanmar is strategically important both for China and India. Both states are interested in energy security and both are dependent on oil imports. However, China's *Go West* and *Open up* strategies, in comparison to India's *Look East* policies, are consistently applied strategies. Thus, China's infrastructural and economic development of the border regions fosters the economic development in these regions and in Myanmar. India has all the prerequisites to forge economic development in Myanmar, while India's engagement in the region is lagging behind. However, its underdeveloped Northeastern region hinders India's plans. Furthermore, the Chinese province of Yunnan in comparison to India's Northeastern states has more autonomy regarding local cooperation with neighboring countries.

After many years of military dictatorship, economic development for Myanmar is on the top of the political agenda. Myanmar profits from FDI inflows. China became an indispensable economic partner and investor for Myanmar. Its FDI top destinations are energy and security sectors. Since, neither India nor other states could substitute decreasing Chinese FDI in 2012. India's trade volume and FDI are still far behind the Chinese one.

India recognizes that its lack of economic engagement in Myanmar has disadvantageous consequences for its economy. Therefore there is a kind of pressure for India to rethink its policies towards Myanmar.

Myanmar benefits from Chinese direct investments and Myanmar's government proceeds to support Sino-Myanmar projects despite civil society protests and anti-Chinese sentiments. However, Myanmar's government can act firmly and persistent while bargaining with an economically powerful China.

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<sup>54</sup> Ibid.

<sup>55</sup> Ibid.

<sup>56</sup> The Irrawaddy 2014; Khine 2013: 50.

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