

**YANGON UNIVERSITY OF ECONOMICS
DEPARTMENT OF APPLIED ECONOMICS
MASTER OF PUBLIC ADMINISTRATION PROGRAMME**

**A STUDY ON THE SOCIO-ECONOMIC IMPACT OF
THE THILAWA SPECIAL ECONOMIC ZONE OF MYANMAR**

**KHIN THIRI WIN
EMPA-18 (19th BATCH)**

JUNE, 2024

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A thesis is submitted as a partial fulfillment towards the requirements for the
Degree of Master of Public Administration (MPA)

Supervised by

U Khun Maung Gyi
Associate Professor
Department of Applied Economics
Yangon University of Economics

Submitted by

Khin Thiri Win
Roll No.18
EMPA 19th Batch
(2022-2024)

JUNE, 2024

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This is to certify that this thesis entitled “**A Study on the Socio-Economic Impact of the Thilawa Special Economic Zone of Myanmar**”, submitted as a partial fulfillment of the requirements for the degree of Master of Public Administration has been accepted by the Board of Examiners.

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(Examiner)
Lecturer

Department of Applied Economics
Yangon University of Economics

.....

U Khun Maung Gyi
(Supervisor)
Associate Professor

Department of Applied Economics
Yangon University of Economics

JUNE, 2024

ABSTRACT

This study investigates the impact of the Thilawa Special Economic Zone (SEZ) on the local community's socio-economic status and infrastructure. The study's objectives are to evaluate the current situation of the Thilawa SEZ and to identify the socio-economic status of the local community following its establishment. To achieve these objectives, a survey is conducted with 150 SEZ workers using structured questionnaires. Key informant interviews are also carried out with 30 General Stakeholders and 44 Township-Level Heads of Department and Ward/Village Tract Administrators. The findings reveal significant improvements in local infrastructure, including schools, health facilities, roads, bridges, water supply, power supply, and religious infrastructure. The SEZ affects job opportunities, wages, and business growth. However, the local community is encountering environmental concerns such as increased traffic, pollution, and waste management challenges. Based on the survey results, several suggestions such as providing vocational training and skills development for the local workforce, and better wages and working conditions are made to enhance the socio-economic status of the community.

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LIST OF ABBREVIATIONS

AMS	ASEAN Member States
BCDA	Bases Conversion and Development Act
BCEPZ	The Baguio City Export Processing Zone
BEPZ	The Bataan Export Processing Zone
BGEZ	Border Gate Economic Zone
BOT	Build, Operation, and Transfer
BT	Build and Transfer
CBD	Central Business District
CEPZ	Cavite Export Processing Zone
CEZ	Coastal Economic Zone
CMEC	China-Myanmar Economic Corridor
COD	Cut-off Date
CSR	Corporate Social Responsibility
DHSHD	Department of Human Settlement and Housing Development
DMS	Detailed Measurement Survey
DUHD	Department of Human Settlement and Housing Development
ECPP	Environmental Conservation and Prevention Plan
EIA	Environmental Monitoring Plan
EPZ	Export-Procession Zone
EPZA	Export Processing Zone Authority
EPZs	Export Processing Zones
ESB	Eastern Seaboard
FDI	Foreign Direct Investment
FEZs	Free Economic Zones
FPS	Free Ports
FTZs	Free Trade Zones
FZs	Free Zones
GMS	Greater Mekong Sub region
GoM	Government of Myanmar
HITZ	High-Tech Industrial Zone
IEE	Initial Environmental Examination

IPs	Industrial Parks
IRP	Income Restoration Program
IZ	Industrial Zone
JICA	The Japan International Cooperation Agency
KII	Key Information Interview
KP SEZ	Kyaukphyu Special Economic Zone
MEPZ	Mactan Export Processing Zone
MITT	Myanmar International Terminals Thilawa
MJTD	Myanmar Japan Thilawa Development Limited
NGO	Non-Government Organizations NGO
OSSC	One Stop Service Centre
PAP	Project Affected People
PEZA	The Philippines Economic Zone Authority
RWP	Resettlement Work Plan
SBMA	Subic Bay Metropolitan Authority
SEZs	Special Economic Zones
SLRD	Survey Land Record Department
SS	Suspended Solid
TCMP	Thilawa Complaint Mechanism Program
TDS	Total Dissolved Solid
TSEZ	Thilawa Special Economic Zone
TSMC	Thilawa SEZ Management Committee

CHAPTER I

INTRODUCTION

1.1 Rationale of the Study

Most emerging nations have developed industrial zones and industrial estates in response to their need to quicken industrialization, improve living conditions for their citizens, and impact regional growth. To be more precise, the main goal is to support industries by encouraging entrepreneurship and helping lists by giving them financing, other financial aid, incentives, and industrial infrastructure.

The establishment of the Industrial Zone aims to improve the social and economic development of the nation by enhancing employment opportunities for residents of newly developed towns, promoting the economy by encouraging the inflow of investments and technical know-how from both domestic and foreign sources and improving regional development through the use of Industrial Zones.

Myanmar has been working to advance the national economy to guarantee the growth of agriculture as the foundation and the overall development of other economic sectors. To create a modern, developed country, the industrial sector is essential. As a result, the state has prioritized the growth of the industrial sector.

In Myanmar, three SEZs—Dawei, Thilawa, and Kyaukphyu—have been aggressively established. The main road transit system in the nation is connected to the Thilawa Special Economic Zone. Consequently, sectors that focus on both exports and local markets.

Three Japanese companies and a group from Myanmar formed the Thilawa Special Economic Zone (SEZ) as a joint venture. In addition, it is a form of Japanese development assistance and the biggest investment made by Japan in Myanmar.

The significance of understanding and evaluating the impacts of these economic zones on several socio-economic aspects is reflected in the Special Economic Zone (Thilawa). Establishment of this SEZ aimed to attract international investment, generate employment, promote economic growth, and advance industrial development within the area. An analysis of the Thilawa Special Economic Zone's effects on employment

is required. The zone can reduce unemployment and raise living standards for the local communities in the surrounding areas by providing them with opportunities to get formal work. The Thilawa Special Economic Zone seeks to thoroughly evaluate its socio-economic consequences, encompassing effects on local businesses, employment, income distribution, infrastructural growth, and environmental sustainability.

The creation of the Thilawa Special Economic Zone, the growth of the nation's industrial sector, the local community's access to employment opportunities in Thanlyin Township and Kyauktan Township, the improvement of living conditions, the growth of transportation infrastructure, and the effects on the environment and land loss.

1.2 Objectives of the Study

Objectives of this study are:

- to study the current situation of the Thilawa Special Economic Zone (SEZ) and
- to identify the socio-economic status of the community after the establishment of the Thilawa Special Economic Zone (SEZ).

1.3 Method of Study

This thesis used descriptive methods coming from primary and secondary data. Primary data were collected from Key Information Interviews with questionnaires on the Thilawa Special Economic Zone of workers. Secondary data is obtained from official documents from the Thanlyin District General Administration Department and Thilawa Special Economic Zone (SEZ).

1.4 Scope and Limitation of Study

This survey data was conducted in Thanlyin and Kyauktan townships. The primary data is collected from General Stakeholders, Township Level Head of Department, Ward/Village Tract Administrator, and Thilawa Special Economic Zone of workers total of 224. The secondary data is collected from official websites and related government offices from 2012 to 2023. The study only consist of Thilawa SEZ and its surrounding communities of Thanlyin and Kyauktan Townships.

1.5 Organization of the Study

There are five chapters in the thesis. Chapter I consists of an introduction, rationale, objectives, method of the study, scope, and limitations, and organization of the study. Chapter II is about the Literature review. Chapter III includes an overview of the Thilawa Special Economic Zone in Myanmar. Chapter IV is an analysis of the survey. In Chapter V the conclusion, findings, and suggestions are expressed.

CHAPTER II

LITERATURE REVIEW

2.1 The Role of Socio-Economic Concepts

Socio-economic concepts explore how social and economic factors interact within a society. They include ideas like income inequality, social mobility, poverty, unemployment, social and human capital, and institutional economics. These concepts help analyze the distribution of wealth, opportunities, and resources, as well as the impact of policies and institutions on economic outcomes and social well-being.

Socio-Economic Development: the process of social and economic change depending on cultural and environmental elements, such as work, income, skill development, and education.

Socio-economic concepts are measured by a variety of organizations, research institutions, and government agencies. Here are some key entities and the specific measures they use:

Income Inequality: Gini Coefficient: Measures income distribution within a population. Organizations: WB, OECD. [Gini Index (World Bank Estimate)](The World Bank) [Rogerson, P.(2013)]

Social Mobility: Global Social Mobility Index: Assesses the ability of individuals to move up the social ladder. Organization: World Economic Forum (WEF). (Global Social Mobility Index 2020) (World Economic Forum)

Poverty: Headcount Ratio of Poverty: Measures the proportion of a population living below the poverty line. Organization: World Bank. [Poverty Headcount Ratio at \$ 1.90 a Day (2011 PPP) (% of Population)] (The World Bank)

Unemployment: Unemployment Rate: The percentage of the labor force that is unemployed and actively looking for work. Organizations: U.S. Bureau of Labor Statistics (BLS), International Labor Organization (ILO). (Unemployment Rate) (International Labor Organization) (Jones, S., & Riddell, W. 1999)

Social and Human Capital: Human Development Index (HDI): Measures overall achievement in a country in key dimensions of human development.

Organization: United Nations Development Programme (UNDP). (Human Development Index (HDI)) (United Nations Development Programme) (Sagar, A., & Najam, A. 1998)

Institutional Economics: Worldwide Governance Indicators (WGI): Measures the quality of governance across countries. Organization: World Bank. (Worldwide Governance Indicators) (The World Bank) (Kaufmann, D., Kraay, A., & Mastruzzi, M.2010)

The study of the connection between economics and social conduct is the main objective of the social science of social economics. Social economics theories frequently take into account elements that are not covered by orthodox economics, such as how the environment and ecology affect wealth and consumption. A certain social group's or socioeconomic class's behavior within a society, particularly their purchasing habits, may be attempted to be explained by social economics. Social economists may study the choices and variables associated with an individual's health, criminal activity, and educational attainment.

2.2 Important Role of Industrialization in Economic Development

Industrialization is a key factor in economic development since it promotes growth, generates jobs, and raises productivity. The changeover from an agricultural to an industrial economy is what this process entails. Industrialization has historically contributed significantly to the growth of nations and raised living standards.

The creation of economic growth is one of industrialization's main advantages. A nation's production capacity and output can be increased by building factories and manufacturing plants. An overall expansion of the economy and a higher GDP per capita are the results of this increased production. Innovation and technical breakthroughs are also stimulated by industrialization, as businesses work to increase productivity and create new goods.

Additionally, industrialization gives them access to new job prospects. The need for labor is increasing as new industries are developed, which lowers unemployment and lessens poverty. Apart from creating jobs directly in factories, industrialization also promotes job growth in related industries like services, logistics, and transportation.

Industrialization also increases productivity by providing contemporary technologies and mechanized processes. Higher output per worker and increased manufacturing efficiency are the results of this. Productivity growth raises the

economy's global competitiveness, which draws investment and promotes economic expansion.

Urbanization and industrialization go hand in hand because people migrate from rural to urban areas in search of factory jobs. In response, urbanization fosters the growth of infrastructure, including roads, schools, and medical facilities, as well as economies of scale. These advancements enhance the general well-being and standard of living of society.

Numerous nations have witnessed the revolutionary impact of industrialization on their financial progress. For example, Britain's 18th and 19th century Industrial Revolution established the groundwork for the nation's current standing as an industrial giant. Britain's swift industrial development in areas like coal mining, iron production, and textile manufacturing catapulted the country to the forefront of international trade and business.

In a similar vein, industrialization has been used by nations like South Korea and Japan to achieve impressive post-World War II economic growth. South Korea's concentration on export-led industrialization and Japan's emphasis on technology-intensive businesses have helped them rise to prominence in the global economy.

African nations like Ghana, Kenya, and Ethiopia are embracing industrialization as a way to boost their economies and fight poverty. These countries want to invest in manufacturing, agribusiness, and infrastructure to increase productivity, generate employment, and realize their full economic potential.

In summary, industrialization promotes growth, creates jobs, and raises productivity—all of which are critical components of economic progress. Nations with a strong industrialization agenda are better positioned to lower poverty, raise living standards, and achieve long-term economic growth. Through using the potential of industry and technological advancements, countries can steer towards a more prosperous future. (Todaro, M. P., & Smith, S. C. (2014).)

2.3 Development Experience of Special Economic Zones in Selected Countries

Many Asian countries are using Special Economic Zones (SEZ) which include export processing zones, industrial parks, eco-industrial parks, technology parks, and innovation districts into their economic development policies more and more.

In studying the special economic zone development of selected countries, Vietnam, and Indonesia are mainly studied.

2.3.1 Socio-economic Impacts of Special Economic Zones (SEZs) in Vietnam

With 295 industrial parks, 3 technology parks, and 15 economic zones drawing over 50% of overall FDI and 80% of manufacturing FDI, the SEZs are essential to Vietnam's FDI strategy. By 2020, 400 industrial parks and 18 economic zones were to be included, according to a master plan signed in 2015. Compared to the Philippines and Thailand, SEZs employ 2.5% of the labor force and provide 40% of GDP and 45% of export value. They are managed at the provincial level, with the central government coordinating. (Nguyen,H., & Tien, D.2020)

Since economic liberalization in 1986, Vietnam has developed various SEZ models, including EPZs, IZs, HITZs, and BGEZs. The first EPZ was established in Tan Thuan in 1991. Vietnam has continuously adapted its SEZ strategies, even piloting special economic zones in Phu Quoc Island, Van Don, and Bac Van Phong to drive future development. The first BGEZ was set up in 1996 in MongCai, and the first HITZ in 1998 in Hoa Lac.

By 2017, six-zone models had been developed. The legislation in 2018 formalized SEZ development, requiring special administrative governance. BGEZs, selected based on strategic characteristics, aim to enhance infrastructure, trade, and investment in remote border areas, improving local livelihoods. However, new regulations in 2018 curtailed tax privileges for SEZs, reflecting a shift towards broader economic integration through free trade agreements.

Positive Impacts on the Economy: The SEZs attract domestic and foreign investment, contributing significantly to industrial production value and economic development. They improve operational competence through modern management and technological innovation. The SEZs boost export value, infrastructure development, and economic connectivity.

Positive Impacts on Society: The SEZs reduce unemployment, improve living standards, and promote industrialization and modernization. They enhance worker skills, discipline, and professional standards. The SEZs contribute to developing local schools, hospitals, and other services, supporting urbanization and regional security.

Negative Impacts on Society: Land confiscation for SEZs disrupts agriculture and increases unemployment among agricultural workers. The SEZ development strains public services like housing, schools, and hospitals. Social instability and cultural erosion result from the influx of migrant workers, leading to conflicts between modern and traditional values.

In summary, while the industrial parks (IPs) in Vietnam significantly boost the state's economy and contribute to societal development by creating jobs and improving infrastructure, they also present challenges such as land confiscation, increased social instability, and erosion of local cultural traditions. Balancing these positive impacts with the negative consequences is crucial for sustainable and inclusive growth.

2.3.2 Socioeconomic Impacts of Special Economic Zones (SEZs) in Indonesia

As of 2022, Indonesia has 19 Special Economic Zones (SEZs), with 12 operational and the rest under construction. Announced in 2014 by President Joko Widodo, SEZs aim to attract foreign investments, building on the success of the country's free trade zones.

The first SEZs began operating in 2015, with most starting in 2019. Spread across the country to diversify beyond Java, SEZs have drawn over US\$5 billion in investments and created over 28,000 jobs by 2021. The SEZs focus on various activities such as logistics, export processing, and tourism, leveraging local resources. For example, the ArunLhokseumawe SEZ in Aceh centers on petrochemicals, oil, and gas, while the Mandalika SEZ in Lombok promotes eco-tourism and agro-industry. The Kendal SEZ in Central Java specializes in manufacturing sectors like garments, electronics, and food and beverages. (Austidja, E.,Purnamawati, A., & Setiawati, R. 2017)

The SEZs offer well-integrated infrastructure and a range of fiscal and non-fiscal incentives, including tax reductions and import duty exemptions, making them attractive to investors. However, successful investment requires a long-term perception, aligning industry needs with SEZ infrastructure and policies.

Due to the SEZs, Indonesia faces social challenges such as poverty, urbanization, cultural diversity, environmental degradation, disaster resilience, and unequal access to healthcare and education. However, the SEZs have positively impacted the country by creating jobs, stimulating economic growth, developing infrastructure, enhancing skills, facilitating technology transfer, and promoting social and inclusive development. These zones have improved livelihoods, increased productivity, and improved healthcare, education, and social services, fostering inclusive growth by providing opportunities for women, youth, and marginalized groups.

Indonesia's SEZs have the potential to drive sustainable social development and improve the quality of life for people living in the regions where they are located. However, it is important for the government and companies operating in SEZs to ensure that the social benefits of these zones are distributed equitably and that potential negative social impacts, such as displacement of communities or environmental degradation, are addressed and mitigated.

2.4 Review on Previous Study

Yunita Ismail (2017) studied the economic development aspects in the Bekasi District between 1981 and 2015 about the development of industrial zones and determined the social development aspects in the Bekasi District between 1981 and 2015 about the development of industrial estates. The study was conducted at Ki Hajar Dewantara Street Jababeka Education Park Cikarang-Bekasi. Descriptive analysis of the available data is the analytical technique used to determine the evolution across the given time frame. The evolution of the economic dimensions of labor viewed as working or not working, rice production and harvested area, GDP, export-import, and the expanding number of businesses. In terms of social aspects, there has been an increase in housing stock, population growth, and school development. Expanding the number of businesses in the sector can provide jobs and help the Bekasi District's labor force to be absorbed. The GDP's economic indicators demonstrated a notable rise. Variations in the population serve as indicators of social conditions, but the number of homes being built and the demand for educational facilities are also rising.

Khin Htar Nwe (2018), "A Study on Land Administration of the General Administration Department in Thanlyin and Kyauktan Township, Yangon Region", studied the General Administration Department's Land Administration in the Thanlyin and Kyauktan Townships. In terms of land priority ownership rights and land value market appreciation, certain lands that have been leased for industrial and commercial purposes have been found to have monopolistic status, per her research. The above-mentioned kind of monopoly and the practice of getting a lease for a purpose other than the one for which it was sought are further facilitated by the absence of oversight or monitoring of corporate operations by pertinent ministries or departments. It has been

found that the calculation's standard values are out of date, and the result is an unreasonable figure given the circumstances and the state of the market. A big tract of land should not be leased to private interests for industrial or commercial purposes, except the government's Master Plan or any other SEZ project.

Khin Yu Yu Win (2019), in “A Study on Resettlement Effects on Women”, studied the resettlement concerns from the perspective of gender perception and examined the effects of resettlement on women residing at the resettlement site. Using a descriptive method and a qualitative approach, the study discovered that women who were resettled experienced more negative outcomes from the resettlement, including increased financial dependence on their husbands, a reduced capacity to provide a basic food supply for their families, a diminished voice in household decision-making, and debt. After relocation, women benefit from having access to training. The resettlement thus weakened the standing of women.

Vu Anh (2019), “The Impacts of Industrial Parks to Socio-Economic Development Experimental Research in THAI BINH PROVINCE, VIETNAM”, studies the overall advantages and disadvantages of industrial parks for Vietnam's socioeconomic growth, with a focus on Thai Binh Province. The design of industrial parks (IPs) is essential to advancing local socioeconomic progress, modernization, and industrialization. It illustrates the advantages and disadvantages of growing intellectual property in the environment, economy, and society through descriptive statistic data analysis and T-Test between firms inside and outside IPs. The state of Thai Binh province was investigated, and statistical findings from the examination of primary data gathered from surveys of businesses both inside and outside of IPs were presented.

Brussevich (2020), studied the socio-economic impact of SEZs in Cambodia. The study emphasizes the SEZ program's causal effects and determines that, at the district level, admission into SEZs reduces income disparity and disproportionately benefits female workers. Then, in comparison to other districts, the land values in SEZ districts typically increase while the wages stay mostly constant.

Sanda (2022), Yangon University of Economics, in her thesis entitled “A Study on the Job Opportunities of Thilawa SEZ for the Local Communities”, studies the descriptive method of simple random sampling to investigate the existing job situation

in Thanlyin and Kyauktan Townships, as well as career chances within the Thilawa SEZ for local people. This study discovered that the expansion of the Thilawa Special Economic Zone in Thanlyin and Kyauktan townships has a direct impact on the native population's employment opportunities and living conditions. Working conditions at Thilawa SEZ are also superior to those in comparable occupations elsewhere in the economy in terms of social security benefits, transportation, health care, food, working atmosphere, and working space.

CHAPTER III

OVERVIEW OF THILAWA SPECIAL ECONOMIC ZONE

3.1 Special Economic Zones in Myanmar

According to the Myanmar Special Economic Zone Law (2014), a Special Economic Zone (SEZ) is a zone with demarcated borders. Currently, three SEZs are established in Myanmar; Thilawa SEZ, Dawei SEZ, and Kyaukphyu SEZ.

The Myanmar Special Economic Zone Law establishes the Central Working Body for Myanmar Special Economic Zones to carry out the duties of the law regarding the organization of special economic zones. Myanmar Special Economic Zone Central Working Committee and to carry out the duties of the law, it is stipulated that each management committee must be formed according to the relevant special economic zone.

According to the law, the SEZs are implemented by the nominated developers. The developers are operating for the zones such as sales and marketing, the physical infrastructure operations of water supply, drainage, wastewater, and solid waste management. The services for the developers and investors are provided by the Management Committee and One Stop Service Centre (OSSC) as not only a regulator role but also a facilitator role.

As of 2024, the situation of Special Economic Zones (SEZs) in Myanmar is a mixed one, characterized by both development potential and significant challenges. Myanmar has three designated SEZs: Thilawa, Dawei, and Kyaukphyu. Among these, Thilawa SEZ, near Yangon, is the most advanced and the only fully operational zone. It has attracted investments from various countries, including Japan, Thailand, and the United States, and has created thousands of jobs. The Thilawa SEZ is noted for facilitating knowledge transfers between foreign and local companies, which enhances skills and technology in the local workforce.

3.1.1 Dawei Special Economic Zone

The Dawei SEZ project has an initial phase (up to 30 sqkm) and a full phase (196.5 sqkm). A group headed by an Italian Thai was awarded the concession agreement for the first phase of infrastructure projects in August 2015 and March 2016, which included an industrial estate and supporting facilities such as a small port, LNG terminal, and small power plant. It is situated in Myanmar's Tanintharyi Region, close to the Gulf of Thailand and the Andaman Sea. The Taninthayi Region's capital is Dawei City. The Taninthayi Region is located in the southern portion of Myanmar and has boundaries with the Andaman Sea to the west, Mon State to the north, and Thailand to the east and south. 1.40 million People are living in the 26,777 square kilometer Taninthayi Region. Dawei Special Economic Zone covers 196 square kilometers. One of the foundations of the Dawei SEZ master plan is local and regional incorporation. For instance, it is forecasted that Dawei SEZ will draw fish processing firms, utilizing the potential of aquaculture in Southern Myanmar. Additionally, Dawei SEZ may contribute to ASEAN's regional integration. The Greater Mekong Sub-region (GMS) Southern Economic Corridor is completed by the Dawei Special Economic Zone (SEZ), which also creates a land bridge and regional connectivity between Dawei, Bangkok, Phnom Penh, and Ho Chi Minh City. Additionally, the Dawei Special Economic Zone would improve the Eastern Seaboard (ESB) supply chain connections with Thailand, opening up chances for joint production and boosting the region's economy. Furthermore, Dawei SEZ provides the areas with access to the West (India, the Middle East, Africa, and Europe). The long-term master plan is built on Dawei SEZ's assets. We are confident that investors are drawn to Dawei SEZ for the following reasons, based on comprehensive study and countless interviews and workshops with potential investors. First, it completes the GMS southern economic corridor and is situated in close to the Eastern Seaboard. In addition, Dawei SEZ offers a gateway to the west once the deep sea port is established. Aquaculture, tin, tungsten, and other local resources are also supplied by Dawei SEZ to the Tanintharyi region and its environs. Dawei Special Economic Zone is attracting to labor-intensive enterprises since it also has competitive labor prices. The SEZ legal structure offers investors additional benefits, such as tax breaks. Finally, with import tax exemptions in key export markets such as the European Union, Myanmar exporters have a significant competitive edge.

3.1.2 Kyaukphyu Special Economic Zone (KP SEZ)

Myanmar is actively establishing three special economic zones (SEZs). It is planned to cover 4,300 acres on Kyaukphyu, Ramree Island, Rakhine State, in the Bay of Bengal, and will comprise an industrial zone, a high-end housing project, and deep-water port facilities. Using foreign direct investment to create jobs and raise tax income to improve the standard of living for the local Rakhine population is one of the SEZ's main objectives. The KP SEZ project's plans were initially revealed in 2013. Its development came after the Myanmar Special Economic Zone Law, which established the legislative framework for SEZs, was passed in 2014 and the law's implementing regulations were released in 2015. Tax breaks and other financial incentives are permitted by law to draw in investment and promote production aimed at both home and international markets. The Chinese state-owned company CITIC Group was declared the project's victorious bidder in December 2015. Following the signing of a concessional agreement and shareholders' agreement between China and Myanmar about the deep seaport in 2020, the first phase of development is expected to start. The governments of China and Myanmar are supporting the KP SEZ initiative. The deep seaport portion of the KP SEZ project holds significant strategic and financial value for the China-Myanmar Economic Corridor (CMEC), which is a vital part of China's Belt and Road plan, which focuses mostly on infrastructure. In conjunction with the 1,400 km high-speed Kunming-Muse-Mandalay scheme. The quickest and most cost-effective route between China and India is via the Kyaukphyu railroad, which connects the KP SEZ with China. Additionally, the deep water port in Myanmar gives China access to the Indian Ocean.

3.2 Background History of Thilawa Special Economic Zone

The Thilawa Special Economic Zone (SEZ) is located in Yangon South District in Yangon Region, Myanmar, and encompasses around 2,400 hectares (ha). The location is 23 kilometers by car from downtown Yangon. The Thilawa SEZ is divided between Thanlyin and Kyauktan Townships. Thanlyin and Kyauktan Townships are the two townships most directly involved in the Thilawa SEZ development. The Thilawa SEZ was announced in January 2011 and has been in continuous development since November 2014. Phase 1 (Zone A) of the SEZ (the initial 400 acres) began operations in September 2015. The remaining 2,000 hectares of SEZ will be developed in phases. The Phase 1 (Zone A) extension began in early 2016. The development of

Zone B of the SEZ started in early 2017. The Thilawa SEZ includes the Myanmar International Terminals Thilawa (MITT), a deep-sea port facility constructed in the mid-1990s. The development of the Thilawa SEZ is consistent with the Government of Myanmar's (GoM) focus on long-term economic growth and re-structuring of the Myanmar economy, shifting from a reliance on agriculture, forestry, and fisheries to including labor-intensive industries such as manufacturing and services.

The Myanmar and Japan governments and private sectors jointly develop the Thilawa Special Economic Zone. This project is Public Private Partnership (PPP) with Joint Venture Agreement. Myanmar-Japan Thilawa Development Limited (MJTD) is a joint venture between a privately owned Myanmar company and a privately owned Japanese company. MJTD's share ownership is 10 percent by the Thilawa Special Economic Zone Management Committee, represented by the Myanmar government. Japan International Cooperation Agency (JICA), representing the Japanese government, 10 percent. A Myanmar company, Myanmar Thilawa SEZ Holding Public Co., Ltd. 41 percent, and the Japanese company Mitsubishi, Marubeni and Sumitomo (MMS) Thilawa Development Co., Ltd. is 39 percent.

3.3 Development of Thilawa Special Economic Zone

Since 2010, the Thilawa Special Economic Zone has undergone policy reforms related to the economy. As a result of many liberalization measures, Myanmar's economic growth rate was 6% to 7% annually. "The Thilawa Special Economic Zone has on average contributed 0.38% of the country's GDP, 2.69% of foreign direct investment, and 1% of foreign exports, creating 26,888 domestic and 1,196 foreign employment opportunities, totaling 28,084 jobs. Thilawa Special Economic Zone has not been fully operational yet. Although it has not been able to contribute much to the country's economic development, it has been able to improve the country's industrial development goals and improve the urban lifestyle, so the government needs to continue to provide good support for the development of special economic zones.

Thilawa SEZ is Myanmar's first international special economic zone, and it is located in Thanlyin District, Yangon Region. It is located between Thanlyin and Kyauktan Townships, approximately 23 kilometers (km) southeast of Yangon's Central Business District (CBD) and 30 kilometers from Yangon International Airport.

The SEZ is next to MITT, one of Myanmar's principal deep river ports, and is accessible from Yangon via the Thanlyin No. (1) and Thanlyin No. (2) Bridges (the

Dagon Bridge). If fully developed, the Thilawa SEZ will cover a 2,400-hectare site separated into zones; two zones have already been defined: Zone A and Zone B (Figure 3.1) (see Appendix).

3.3.1 Investment Status of Thilawa Special Economic Zone

From 2016 to March of 2023, from businesses in the Thilawa Special Economic Zone. 18,665.031 million kyat in customs duty to the state. Since 66,904,441 million Kyats of commercial business tax and 1,509,860 million kyats of advance income tax have been submitted, the total amount of taxes collected from these businesses is about 87,446,470 million Kyats. In addition, income tax of 39,064.60 million kyats, 35,446.07 million commercial tax, and 1,203.96 million kyats stamp duty was paid to the state, therefore a total of 75,714.63 million kyats was collected.

From 2016 to May of 2023 as electricity and water usage fees from Thilawa Special Economic Zone to the state, a total of 62,632 million kyats were paid in taxes. 4,408 foreigners in the Thilawa Special Economic Zone paid a total of US\$1.37 million to the state for domestic residence permits and repatriation.

About 72 investment projects (74.99%) in the business promotion zone of Thilawa Special Economic Zone; About 46 investment enterprises in the free zone (22.90%); About 4 investment projects (2.11%) have been approved in the residential and commercial areas. Details are shown in Table (3.1).

Table (3.1) Thilawa Special Economic Zone Approved Investment Status by Zone

No.	Zone	Quantity	Amount of investment (US million dollar)	Percentage
1	Industrial area			
	- Business promotion zone	72	1638.657	74.99
	- Free zone	46	500.333	22.90
2	Residential and commercial area	4	46.100	2.11
	Total	122	2185.090	100

Source: Thilawa Special Economic Zone Management Committee (2023)

Currently, there are about 70 investment projects (76.39%) in the business promotion zone. About 43 investment enterprises in the free zone (21.49%); There are about 3 (2.12%) investment projects in the residential and commercial areas. Details are shown in Table (3.2) below.

Table (3.2) Thilawa Special Economic Zone's Ongoing Investment Status by Zone

No.	Zone	Quantity	Amount of investment (US million dollar)	Percentage
1	Industrial area			
	- Business promotion zone	70	1623.407	76.39
	- Free zone	43	456.583	21.49
2	Residential and commercial area	3	45.100	2.12
	Total	116	2125.090	100

Source: Thilawa Special Economic Zone Management Committee (2023)

3.3.2 Thilawa Special Economic Zone Status of Ongoing Investment by Country/Region

2014- November 2015 fiscal year to March 2023; 20 countries/regions have invested in the Thilawa Special Economic Zone, including 40 companies from Japan. In the first place with the investment amount of 716.380 million US dollars (33.72%) and the number of businesses in Singapore is 23. Second place with an investment amount of 618.280 million US dollars (29.11%) and the number of businesses in Thailand is 16; with an investment amount of 144.093 million US dollars (6.78%), they are also in third place.

In Thilawa Special Economic Zone, investment conditions by sector are 93 companies in the industrial sector with an investment amount of 1722.672 million US dollars. In the commodity trading sector, 9 companies invested 213.808 million US dollars and In transportation and supply, 8 companies contributed to the sector with an investment amount of 95.470 million US dollars. In the service sector, 4 companies

invested in the amount of USD 51.140 million. In the construction and development sector of housing buildings, 1 company invested 30 million US dollars. In the hotel sector, 1 business is operating with an investment amount of 12 million US dollars, and a total of 116 investment companies have invested an investment amount of 2125.09 million US dollars.

Thilawa Special Economic Zone activities in progress are detailed in table (3.3) below:

Table (3.3) Thilawa Special Economic Zone Activities in Progress by Sector

No.	Zone	Quantity	Investment Volume (US \$)
1	Industrial sector	93	1722.672
2	Commodity trading sector	9	213.808
3	Transportation and Supply Sector	8	95.470
4	Service sector	4	51.140
5	Housing construction and development sector	1	30.000
6	Hotel sector	1	12.000
Total	116	2125.090	

Source: Thilawa Special Economic Zone Management Committee (2023)

In the Thilawa Special Economic Zone, 120,400 USD was approved in the fiscal year 2020-2021, and the investment amount of 102,063 million USD was increased due to the 1 million allocated from the previously approved businesses and the investment amount was 102,063 million USD. Also, during the fiscal year 2021-2022 (6-month budget), 13.967 million U.S. dollars were earmarked for the Thilawa Special Economic Zone and no new business was approved, but due to the increase in investment from previously approved businesses, 55.825 million U.S. dollars of foreign investment came in during the 6 months. In the 2022-2023 budget year, foreign investment in the Thilawa Special Economic Zone is set at 63 million US dollars. Thilawa Special Economic Zone has a total area of 2,400 hectares, of which only 624 hectares can be implemented. On top of that, 43 investments in the Free Zone; and 70 in the Promotion Zone; A total of 116 projects are being carried out, with 3 in the residential and

commercial areas. 100% of the products produced by the Promotion Zone are sold locally and at least 75% of the products produced by the Free Zone are exported. Because the raw materials and equipment required for the Promotion Zone and Free Zone businesses must be imported from abroad, it has been determined that the import value exceeds the export value. In addition, if the entire special economic zone can be fully implemented, it greatly contribute to the growth of the country's GDP because the amount of exports is large and foreign income is increasing.

3.3.3 Demographic Characteristics of Yangon Region

Yangon City, the former capital, is located in the Yangon Region and is the most populous city in the country.

Table (3.4) Yangon Region’s Demographic Data

No.	Particular	Numbers		
1	Total	7,526,277		
2	Male	3,528,656		
3	Female	3,997,621		
4	Ratio of Male and Female	1:1.13		
5	Percentage of urban and rural population	Urban-5,134,885 (68.2 %) Rural-2,391,392(31.8 %)		
6	Area (Square Miles)	3967.86		
7	Number of Districts	14		
8	Number of Townships	45		
9	Number of Wards	743		
10	Number of villages	2143		
11	Number of village groups	621		
12	Conventional Households	Urban	Rural	Total
(a)	Population in conventional households	5,134,485	2,391,392	7,526,277
(b)	Number of conventional households	1,248,907	649,470	1,898,377

Source: 2023 from General Administration Department, MoHA

Demographic data for the Yangon Region are displayed in Table (3.4). There were 14, districts, 45 townships, 743 wards, 621 village groups, and 2143 villages out of 7,526,277 total inhabitants. In this group, there were 3,997,621 females and 3,528,656 males.

The Yangon Region was divided into four districts, as seen in Figure (3.2) (See Appendix 4). (East, West, North, and South). South Yangon, or Yangon South District, is home to the Thilawa Special Economic Zone. The vast Yangon South District is made up of ten townships and one sub-township. Prior to April 30, 2022, the Yangon Region consisted of four districts; however, since then, fourteen districts have been added and reorganized. (Figure 3.3) Refer to Appendix 4 for details.

3.3.4 Demographics of Thanlyin Township and Kyauktan Township

Thanlyin Township and Kyauktan Township, which house the Thilawa SEZ, are the two townships that are immediately impacted by the SEZ. The Thilawa SEZ footprint encompasses the territory in both townships, as seen in Figure (3.2) (Refer to Appendix 4). The Greater Yangon Strategic Development Plan 2040, which calls for the establishment of seven satellite towns over the next 25 years to accommodate Yangon City's anticipated population growth from 5.2 to 10 million people, was authorized by the Yangon Division Parliament. The proposed project areas are Kyauktan Township and Thanlyin Township.

3.3.5 Health and Education Infrastructures in Thanlyin Township and Kyauktan Township

Compared to Kyauktan Township, Thanlyin Township has a larger public health infrastructure as well as private health infrastructure (hospital and dispensary clinics). Table (3.5) indicates that Thanlyin Township had one doctor, twenty-eight nurses, and six health assistants, whereas Kyauktan Township had six doctors, fifteen nurses, and five health assistants.

Table (3.5) Health Infrastructure at Township Level (2023)

Health Infrastructure	Thanlyin	Kyauktan
Hospitals	2 Government 1 Private Total: 316 beds	6 Government Total: 130 beds
Dispensary Clinics	59 Private	24 Private
Rural Health Centers	5	11
Sub-Rural Health Centers	22	37

Source: 2023 from General Administration Department, MoHA

Some healthcare ratios differ significantly, most notably Thanlyin's doctor-patient ratio of one doctor for every 283,189 people and Kyauktan's ratio of one doctor per 24,325 people. There is also a significant disparity in the health assistant ratio: one health assistant per 47,198 inhabitants in Thanlyin Township against 34,056 in Kyauktan Township.

Thanlyin Township has less overall educational infrastructure than Kyauktan Township, as indicated in Table (3.6), but it has a higher concentration of medium and higher education institutions, including 5 tertiary institutions.

Table (3.6) Education Infrastructure at Township Level (2023)

Education Infrastructure	Thanlyin	Kyauktan
Universities	5 (22,890 students)	0 (0 students)
Monastery Schools	15 (4,159 students)	5 (845 students)
Basic Education High Schools (BEHS)	14 (3,821 students)	16 (2,389 students)
Basic Education Middle Schools (BEMS)	9 (8,996 students)	23 (5,971 students)
Basic Education Primary Schools (BEPS)	58 (2,7755 students)	93 (18,179 students)
Nursery Schools	1 (100 students)	19 (161 students)
Total	102	156

Source: 2023 from General Administration Department, MoHA

According to Table (3.6), there is a significant difference in some education ratios, most materially; Teacher-student ratio in Thanlyin was 1 teacher for 12 students

in University, 1 teacher for 29 students in Monastery School, 1 teacher for 24 students in BEHS, 1 teacher for 33 students in BEMS, 1 teacher for 53 students in BEPS, 1 teacher for 20 students in Nursery Schools while Kyauktan's ratio were 1 teacher for every 23 students in Monastery Schools, 1 teacher for every 20 students in BEHS, 1 teacher for every 29 students in BEMS, 1 teacher for every 41 students in BEPS and 1 teacher for 9 students in Nursery Schools.

3.3.6 The Current Situation in Thanlyin Township and Kyauktan Townships

The Yangon Region of Myanmar's Ministry of Immigration and Population is divided into fourteen districts. The Thilawa Special Economic Zone is located in Yangon's Thanlyin District (sometimes called South Yangon). Thanlyin District is a large territory made up of five townships and one sub-township. Thanlyin Township and Kyauktan Township, which host the SEZ, are the two townships in South Yangon that are immediately affected by the Thilawa SEZ.

Thanlyin Township has a total area of 143.98 square miles, which includes 17 quarters, 28 village groups, and 57 villages, while Kyauktan Township has a total area of 325.76 square miles, which includes 13 quarters, 45 village groups, and 80 villages.

Table (3.7) Thanlyin Township's Demographic Data (2023)

No.	Particular	Numbers		
1	Total	283,189		
2	Male	137,196		
3	Female	145,993		
4	Ratio of Male and Female	1:1.06		
5	Percentage of urban and rural population	Urban-79,182 (27.9 %) Rural-204,007 (72.1 %)		
6	Area (Square Miles)	143.98		
7	Number of Wards	17		
8	Number of villages	57		
9	Number of village groups	28		
10	Conventional Households	Urban	Rural	Total
(a)	Population in conventional households	79,182	204,007	283,189
(b)	Numbers of conventional households	22,209	61,729	83,938

Source: 2023 from General Administration Department, MoHA

Table (3.7) depicts Thanlyin Township's demographic information. With a population of 283,189 people, it was divided into 17 quarters, 28 village groups, and 57 villages. There were 137,196 men and 145,993 women in this group. The number of males and females was practically same.

Table (3.8) Kyauktan Township's Demographic Data (2023)

No.	Particular	Numbers		
1	Total	170,278		
2	Male	83,396		
3	Female	86,882		
4	Ratio of Male and Female	1:1.04		
5	Percentage of urban and rural population	Urban- 48,444 (28.45 %) Rural-121,834 (71.6 %)		
6	Area (Square miles)	325.76		
7	Number of Wards	13		
8	Number of villages	45		
9	Number of village groups	80		
10	Conventional Households	Urban	Rural	Total
(a)	Population in conventional households	48,444	121,834	170,278
(b)	Numbers of conventional households	13,559	33,628	47,187

Source: 2023 from General Administration Department, MoHA

Table (3.8) presented demographic information for Kyauktan Township. Kyauktan Township has a population of 170,278 and is organized into 13 quarters, 45 village groupings, and 80 villages. There were 83,396 men and 86,882 women in this category. In Kyauktan Township, there were 100 men for every 104 females, hence the female population was somewhat larger than the male population.

The unemployment rate, according to official data, was approximately 46.55% for Thanlyin Township and 20.43% for Kyauktan Township are as shown in Table (3.9).

Table (3.9) Unemployment Rate in Thanlyin Township and Kyauktan Township

Township	People who can work	Employed People	Unemployed People	Unemployment Rate (%)
Thanlyin	223,859	152,754	71,105	46.55%
Kyauktan	126,746	105,246	21,500	20.43%

Source: 2023 from General Administration Department, MoHA

However, considering that about 46.55% of Thanlyin Township and 20.43% of Kyauktan Township residents still resided in rural areas and participated in subsistence livelihood activities, this was likely to underestimate unemployment and underemployment. As of March 2024, 116 firms in the Thilawa Special Economic Zone employ 11,122 local communities in Thanlyin and Kyauktan Townships.

The total value of Thanlyin Township's gross domestic product (GDP) in the 2022-2023 budget year was 745,917.9 million Myanmar Kyats, whereas Kyauktan Township's GDP was 318,645 million Myanmar Kyats, according to table 3.10.

Table (3.10) Total Value of Gross Domestic Product (GDP) of Thanlyin Township and Kyauktan Township

(Kyat)

No.	Particular	2021-2022		2022-2023		Implementation Percentage	
		Thanlyin	Kyauktan	Thanlyin	Kyauktan	Thanlyin	Kyauktan
1	Production	366,673.7	155,198.6	385,400.2	193,032.3	105.11	124.38
2	Services	120,519.0	49,944.7	124,289.3	65,564.1	103.13	131.27
3	Trading	235,926.8	53,166.1	236,228.4	60,049.1	100.13	112.95
	Total	723,119.5	258,309.4	745,917.9	318,645.5	103.15	123.36

Source: 2023 from General Administration Department, MoHA

In 2023-2024, Thanlyin Township's per capita income was Kyats 3,367,950 Kyauktan Township had Kyats 2,105,541 according to Table (3.11).

Table (3.11) Per Capita Income of Thanlyin Township and Kyauktan Township**(Kyat)**

No.	Township	2021-2022	2022-2023	2023-2024
1	Thanlyin	3,067,667	3,279,506	3,367,950
2	Kyauktan	1,756,245	1,930,893	2,105,541

Source: 2023 from General Administration Department, MoHA

Occupation activities in Thanlyin Township and Kyauktan Township were shown in Table (3.12).

Table (3.12) Types of Occupation in Thanlyin Township and Kyauktan Township

No.	Particular	Thanlyin		Kyauktan	
		Numbers	Percentage	Numbers	Percentage
1	Government employee	2,349	1.54	1,812	1.73
2	Services	5,515	3.61	12,021	11.46
3	Agriculture	3,987	2.61	10,052	9.58
4	Livestock	595	0.39	10,028	9.56
5	Sale Businesses	68,739	45.0	7,080	6.75
6	Industry	9,249	6.05	5,900	5.62
7	Casual Labor	36,661	24.0	16,661	15.88
8	Other	25,659	16.8	41,365	39.42
	Total	152,754	100	104,919	100

Source: 2023 from General Administration Department, MoHA

Note: Other means Cycle carry driver, Trishaw driver, and work in season

According to the table (3.12), the sales industry employed about half of the total workforce. 24% had worked as casual laborers, while the remaining 16.8% had worked as cycle carry drivers, trishaw drivers, or seasonal workers. Thanlyin Township had the fewest livestock-related businesses. In Kyauktan Township, 39.42% of persons worked as cycle and trishaw drivers throughout the season. 15.88% were engaged in casual labor, while 11.46% were employed in services. Fisheries were the least prevalent business in Kyauktan Township.

3.3.7 Environmental Conservation and Prevention Activities of Thilawa SEZ

As the Thilawa Special Economic Zone Management Committee, verifying Environmental Conservation and Prevention Plan- ECPP submitted by investment businesses and factories in the Thilawa Special Economic Zone, issuing Initial Environmental Examination-IEE or Environmental Impact Assessment-EIA report approvals and preparing depend on the type of business.

Indoor Air, Ambient Air emission measurement as per Environmental Monitoring Plan as described in approved ECPP/IEE/EIA reports; construction and construction activities; factories are required to monitor and measure water quality by published instructions. Equipment of the necessary sanitation system and to be purified to the specified standard and connect to the central sewage system of the zone. Monthly monitoring of 7 parameters such as Total Dissolved Solids-TDS, Suspended Solids-SS, Oil and Grease, pH Value, and Temperature for biodegradation/ chemical demolition before disposal; check whether or not it is included in the regular Environmental Monitoring Report and if not, it is found that notices are being made to include. Thilawa Special Economic Zone's environmental activities are detailed in the table (3.13) below:

Table (3.13) Environmental Activities (from November 2014 to December 2023)

No.	Particular	ECPP	EMP	IEE	EIA	Fieldwork	Monitoring Report
1	Before construction	145	-	-	2	-	-
2	Construction period	-	-	-	-	263	218
3	Operating period	67	-	31	7	121	674
4	Period of temporary Suspension of operation	-	-	-	-	-	18
5	Business expansion	1	1	-	-	-	-
	Total	213	1	31	9	384	910

Source: Thilawa Special Economic Zone Management Committee (2023)

Table (3.13) details the environmental protection activities from November 2014 to December 2023, according to the Environmental Conservation and Prevention Plan (E CPP) presented by the investment factories in accordance with standard procedure (145). These include operating operations (67), expansion of operations (1), one expansion of operations in accordance with the Environmental Monitoring Plan (EMP) (29), Environmental Impact Assessment (EIA) two before construction, seven during construction, (384) field inspections, and ninety-one inspections of monitoring reports.

3.4 Resettlement Work Plan (RWP) of Thilawa SEZ

Since 2011, Myanmar's government has prioritized foreign direct investment (FDI) as a vital driver of national growth. The government expects the Thilawa, Dawei, and Kyaukphyu Special Economic Zones to contribute significantly to economic growth and job creation in Myanmar.

The total demarcation area of the Thilawa Special Economic Zone (SEZ) is 2400 ha, and therefore the Myanmar side initially started to collect the socio-economic survey census from April 4 to April 26, 2013 to compensate and resettle within the zone. The Thilawa SEZ supporting committee, the Department of Human Settlement and Housing Development (DUHD, Ministry of Construction), the Ministry of National Planning and Economic Development, the Township General Administration Department, the Survey Land Record Department (SLRD), the Immigration Department, Development Affairs, Police, and the Ward and Village Tracks Administration make up the survey team. Throughout the eight days, we watch and record all households using a standardized questionnaire form.

As a result, in accordance with international conventions, the cut-off date was issued on April 4, 2013, by the General Administration Department in Yangon Region's southern area. The cut-off date (COD) determines eligibility for compensation and/or assistance.

Regarding preparation for Thilawa SEZ development, the Resettlement Work Plan (RWP) was started to conduct the Detailed Measurement Survey (DMS) in July 2013, led by the JICA Resettlement Expert Team. Firstly, the Thilawa SEZ Management Committee (TSMC) held consultation meetings to inform the Project Affected People's (PAP) participation in the data collection time.

According to the feasibility study and the international investor demand, Thilawa SEZ is developed phase by phase, which is defined as Zones “A” and “B.” The Resettlement Work Plan (RWP) was defined as 400 ha, and for the remaining area of 2,000 ha, RWP shall be implemented phase by phase. A common support policy for the entire 2,000 ha development area has been formed by preparing the eighty-one households residing inside the defined area of Zone “A.” RWP 400 ha identified three sorts of households: those who live within the zone, those who cultivate within the zone while also living within it, and those who cultivate within the zone but live outside of it. These households received different compensation packages. Persons (or households) who live or generate income in the Thilawa SEZ on COD are eligible for compensation and/or support.

The survey team, the Thilawa SEZ Management Committee (TSMC), the Japan International Cooperation Agency (JICA) resettlement team, and government departments—including the Agriculture Department, the Department of Human Settlement and Housing Development (DHSHD), the General Administration Department, the Immigration Department, and the Land Revenue Department—formed the DMS to survey the demarcated area. The focus of the DMS survey was to gather socioeconomic data, including the loss of agricultural uses, property, income, and PAP social data, in order to evaluate the compensation package in accordance with JICA norms and the World Bank Framework.

Myanmar law, the JICA Guidelines for Environmental and Social Consideration (2010), and the World Bank Safe Guard Policy serve as its foundations. The Farm Land Law of 2012 and the Land Purchase Act of 1894 have been the primary tools used in the land purchase process for the Thilawa SEZ development region. The Special Economic Zone Law of 2014 is one of the laws and regulations that currently exists that addresses resettlement-related matters.

According to the survey data, there were 1,066 households living inside the demarcated area; therefore, the collected data and GPS collection points were thoroughly reviewed by the four parties. Then, the consultation meeting explained the compensation package for PAPs. After that, the RWP book was issued, and it could read and give comments on the village and town administration offices and the DHSHD office within one month, which were advertised in the national newspapers. Then, the Thilawa SEZ Management Committee submitted the Resettlement Work Plan to the Yangon Region Government to get approval for the compensation and relocation.

The series of negotiation meetings were followed for PAP satisfaction, so the negotiator must be patiently discussed. Then the provision of compensation and the relocation process started. The compensation package included assets, livelihoods, and social items. Assets of compensation include resettlement assistance, taking into consideration the house area, cow sheds, and agricultural machines. The livelihood category is considered for the losses of paddy field area, vegetables and crops, livestock, wage workers' income, and transportation charges. The provision of livelihood compensation is much higher than defined by Myanmar law. Social assistance involves moving costs, the age of 61 years and older, disabled persons, women-headed households, under-poverty-line households, students' transportation charges, and additional social costs.

The PAPs' houses were constructed in the relocation area, which was 3 kilometers away from Thilawa SEZ, and a 30 x 50-foot plot size was provided, including the construction cost of the house. Around the resettlement, the social and physical infrastructures are well-connected and newly installed. The physical infrastructure of roads, water, and electricity is installed, as is the existing social infrastructure, such as kindergartens, primary schools, middle schools, rural health care centers, libraries, community centers, village tract administration, pagodas, and monasteries.

According to the situation, Zone "B" resettlement is different from Zone "A." There are three options for the resettlement: the first option is the provision of a plot and house in the relocation area; the second option is the provision of an apartment near the Thilawa SEZ; and the third option is to provide cash assistance for the resettlement. Project-affected persons can choose among the options.

Therefore, the Resettlement Work Plan is the first time to implement international standards in Myanmar. The news of the above works is transparency for international non-governmental organizations, private non-governmental organizations (NGOs), and international and local media. A few complaints are faced because of individual greedy demands. These issues can be solved by the Thilawa Complaint Mechanism Program (TCMP) at the Thilawa SEZ Management Committee. The Income Restoration Program (IRP) is followed three years after the resettlement.

3.5 Income Restoration Program (IRP) of Thilawa SEZ

Income Restoration Program (IRP) was introduced after the Resettlement Work Plan, which was guided by the JICA expert group. This is the first experience program in Myanmar which is comprised of JICA guidelines. This program was supported for 3 years to improve the livelihood changes of Project Affected Person. IRP is an in-kind assistance program to restore and stabilize the livelihoods of Project Affected Households (PAHs) economically and socially initiated after the resettlement is done. IRP is being performed by two components; restoration of economic conditions and development of positive and sustainable living conditions. IRP helps PAPs build their capacity in the skills required for generating an income and gives them the tools they need to find steady employment. IRP includes technical assistance, vocational training, and other forms of support like housing, education, social welfare, and the environment. The activities of the Income Restoration Program (IRP) are as follows:

- (1) **Economic Condition Support Program:** The project is job matching and the activities in progress are job readiness, vocational training, dissemination of job vacancy information, CV submission, and interview.
- (2) **Social Welfare and Educational Condition Support Program:** The project is a vulnerable people program and its ongoing activities are to support provision, counseling, support, and quarterly monitoring.
- (3) **Environmental, Security, and Living Condition Support Program:** The first project is about the assurance of infrastructure and housing conditions in a community with a sound environment project, the activities of this program are to organize a community working group for community management and to follow up of infrastructure facility at Zone B relocation site; Water Supply System, Electricity, Drainage, and Toilet. The second project is to secure ownership of the land property which is to provide land title at the relocation site for Zone A and B PAPs and then land compensation issue at the relocation site with previous residents.

3.6 Social Responsible Activities of Thilawa SEZ

Since 2015, Myanmar Japan Thilawa Development Limited (MJTD), the developer and operator of Thilawa SEZ, has voluntarily undertaken socially responsible activities to support communities impacted by the Thilawa Special Economic Zone (TSEZ). This commitment involves comprehensively understanding, monitoring, and

managing the social, environmental, and economic impacts of TSEZ operations. The primary objective is to promote sustainable development in the areas surrounding Thilawa SEZ. Rooted in the company's core values, MJTD strives to fulfill these responsibilities through both actions and corporate policies, thereby positively contributing to the neighboring communities of Thilawa SEZ.

As a conscientious business developer and operator of Thilawa SEZ, MJTD has actively engaged in socially responsible programs. These initiatives are designed to respect all neighboring communities and support vulnerable groups and residents, including Thilawa SEZ workers. The Community Relations Department of MJTD consistently implements various social support programs to address the needs and requirements of the local communities. These programs, conducted on behalf of all investors and locators in Thilawa SEZ, primarily focus on educational support, social welfare support, healthcare support, environment and community development, and stakeholder engagement.

The following are recognized as eligible CSR activities of Thilawa SEZ:

1. Promoting education, including special education, school supplies, employment enhancement, and vocational skills training, especially for State-school students, pre-university/university students, project-affected persons (PAPs), and individuals from the project-affected community (PAC) of Thilawa SEZ.
2. Promoting healthcare, including preventive healthcare services, contributing medical supplies and equipment to neighboring rural health centers, their sub-centers, and township hospitals, and improving sanitation and access to safe drinking water.
3. Promoting social welfare support for senior citizens, empowering women to establish regular income, providing facilities to reduce social and economic inequalities, and contributing to social and sports activities in the neighboring community of TSEZ.
4. Contributing to the development of basic infrastructure in neighboring communities of TSEZ, such as school buildings, school sports complexes, road paving, community hubs, daycare centers, old age homes, sports areas, and libraries.
5. Preserving the quality of the land, air, and water while promoting ecological balance, environmental sustainability, and resource conservation.

6. Contributing to rural development projects initiated by the Township/Region Government.

Based on these eligible criteria, the Thilawa SEZ continuously supports to local communities based on the annual plans that are developed through the inclusiveness and empowerment of all Thilawa SEZ investors (locators) both in financial and voluntarily basic to be more effective and efficient way of working all together by coordination and cooperation between all stakeholders.

MJTD's commitment to corporate social responsibility (CSR) is evident through its systematic approach to integrating social, environmental, and economic considerations into its operational strategy. By prioritizing these CSR activities, MJTD not only enhances the quality of life for the residents in the surrounding communities but also fosters a harmonious relationship between the Thilawa SEZ and its neighbors. The initiatives undertaken are designed to create a sustainable environment where economic development goes hand in hand with social progress and environmental stewardship.

The Community Relations Department of MJTD plays a pivotal role in ensuring the successful implementation of these programs. By actively engaging with local stakeholders, including community leaders, government officials, and non-governmental organizations, the department ensures that the programs address the genuine needs and aspirations of the local population. Through regular consultations and feedback mechanisms, MJTD can continuously improve and adapt its CSR strategies, ensuring long-term positive impacts on the communities surrounding the Thilawa SEZ. This proactive and inclusive approach not only mitigates potential adverse effects of the SEZ's operations but also contributes to the overall sustainable development of the Thilawa SEZ communities.

CHAPTER IV

SURVEY ANALYSIS

There are two sections in this chapter. An overview of the survey area and a profile of the respondents are given in the first part. The socioeconomic effects of the development of the Thilawa Special Economic Zone are covered in the second part.

4.1 Survey Profile

The study is expected to have a positive socioeconomic impact in the Thilawa Special Economic Zone. Data for the survey were gathered in May 2024 from a random sample of 224 people. This sample consisted of 150 SEZ employees, 30 general stakeholders, 8 Township-Level Heads of Department from Thanlyin and Kyauktan, and 36 Ward/Village Tract Administrators. All responders live in the Thanlyin and Kyauktan townships. The questionnaire used in this study is in the appendix.

4.2 Survey Design

This study employed a descriptive method using both quantitative and qualitative approaches. Primary data collection tools included Key Informant Interviews and in-depth interviews. Key Informant Interviews were conducted with three representatives from the General Stakeholders, Township-Level Heads of Department, Ward/Village Tract Administrators, and the SEZ committee at the location site. The workers in the study were employed in Thilawa SEZ and lived in Thanlyin and Kyauktan townships. The questionnaire used for this study can be found in the appendix.

Table (4.1) presents the distribution of sample respondents across six wards and village tracts about the Thilawa Special Economic Zone (SEZ) workers.

Table (4.1) Distribution of Sample Respondents by Six Ward/Village Tracts and Thilawa SEZ Workers

Ward/Villages	Frequency	Percent
Aye Mya Thidar Ward	25	16.7
ShwePyi Thar Yar Ward	25	16.7
Thidar Myaing Ward	25	16.7
Ah Lun Soke Village Tract	20	13.3
NyaungWaing Village Tract	25	16.7
Shaw Pyauk Village Tract	30	20.0
Total	150	100.0

Source: Survey data, 2024 (May).

The data shows an even distribution among Aye Mya Thidar Ward, Shwe Pyi Thar Yar Ward, Thidar Myaing Ward, and Nyaung Waing Village Tract, each contributing 16.7% of the total sample. Ah Lun Soke Village Tract represents 13.3% of the respondents, while Shaw Pyauk Village Tract has the highest representation at 20%. This distribution is crucial for understanding the socio-economic impacts of the Thilawa SEZ, as it ensures that a diverse range of perceptions from different communities are included. The even spread among most wards and slightly higher representation from Shaw Pyauk Village Tract allows for a comprehensive analysis of how the SEZ has affected various localities, providing a robust foundation for assessing both the current situation of the SEZ and the socio-economic status of the communities involved.

Table (4.2) presents data from Key Information Interviews (KII) conducted as part of a study on the Thilawa Special Economic Zone (SEZ).

Table (4.2) Key Information Interview (KII)

Sr. No.	Statement	Total
1.	General Stakeholder	30
2.	Township Level Head of Department	8
3.	Ward/Village tract administrators	36
	Total	74

Source: Survey data, 2024 (May)

The table categorizes the interviewees into three groups: General Stakeholders, Township-Level Heads of Department, and Ward/Village Tract Administrators. A total of 74 interviews were conducted, with 30 General Stakeholders from Thanlyin District General Administration Department(GAD), Japan International Cooperation Agency Team, Myanmar Japan Thilawa Development Limited (MJTD), One Stop Service Center (OSSC) and Thilawa SEZ Management Committee (TSMCC), 8 Township-Level Heads of Department including Township General Administrators, Agriculture, Land Records Department, Planning Department, and 36 Ward/Village Tract Administrators participating. This distribution indicates a broad range of perceptions, with a significant representation from local administrative authorities, which provides a comprehensive understanding of the socio-economic impacts of the SEZ on various community sectors.

4.3 Survey Results

A questionnaire was developed focusing on four key aspects: SEZ workers, General Stakeholders, Township-Level Heads of Department, and Ward/Village Tract Administrators. The results for each aspect are presented in the study, offering a detailed analysis of the perceptions and experiences of each group about the Thilawa SEZ.

4.3.1 Demographic Characteristics of SEZ Workers

The demographic information gathered from 150 SEZ workers in Thilawa SEZ provides a valuable understanding of the workforce composition. Table 4.3 covers various aspects such as age, gender, marital status, township distribution, living arrangements, number of dependent family members, and educational qualifications.

Table (4.3) Demographic Characteristics of SEZ workers

Description	No. of Respondents	Percentage
Age Level (Year)		
Under 30	101	67.3
31 – 40	35	23.3
41 – 50	13	8.7
51 and above	1	.7
Total	150	100.0
Gender		
Male	72	48%
Female	78	52%
Total	150	100.0
Description	No. of Respondents	Percentage
Marital Status		
Married	86	57.3
Single	60	40.0
Divorced	2	1.3
Widow	2	1.3
Total	150	100.0
Township		
Dagon Seikan	2	1.3
Kyauktan	125	83.3
Thanlyin	23	15.4
Total	150	100.0
Living with Family		
Yes	130	86.7
No	20	13.3
Total	150	100.0
No. of dependent family members		
1 to 2	66	44.0
3 to 4	69	46.0
More than 4	15	10.0
Total	150	100.0
Qualification		
Able to Read & Write	2	1.3
Primary Level	11	7.3
Middle School Level	63	42.0
High School Level	40	26.7
University Level	12	8.0
Graduate	22	14.7
Total	150	100.0

Source: Survey data, 2024 (May)

The majority of SEZ workers fall under the age group of under 30, constituting 67.3% of the workforce. This indicates a relatively young workforce in Thilawa SEZ, which may bring energy, innovation, and adaptability to the workplace.

The gender distribution among them is almost equal, with 48% male and 52% female workers. This balanced gender representation represents a commitment to diversity and inclusivity within the SEZ.

The data reveals that a significant portion of workers are married (57.3%), followed by single individuals (40.0%). This information is crucial for understanding the support systems and responsibilities that workers may have outside of their professional roles.

Among the surveyed workers, Kyauktan township has the highest representation at 83.3%. This concentration indicates factors such as proximity to the SEZ, housing availability, or specific recruitment strategies in that area.

The majority of SEZ workers (86.7%) reported living with their families. Understanding that most workers have family support systems can be beneficial for employers in terms of employee well-being and engagement. Additionally, a significant portion of workers have 3 to 4 dependent family members (46.0%), highlighting potential financial responsibilities that could impact their work-life balance.

Regarding qualifications, the data shows a diverse range of educational levels among the workers. The majority have completed high school (42.0%) or middle school (26.7%), indicating a skilled workforce with varying levels of academic backgrounds. The figures for university level and graduates are 8.0% and 14.7% respectively, suggesting that higher education is less prevalent but still significant. Meanwhile, a small percentage of the population, 1.3%, is only able to read and write, and 7.3% have only completed primary-level education. These statistics highlight the varied educational background within the community, which is crucial for understanding the socio-economic changes brought about by the establishment of the Thilawa SEZ.

4.3.2 Workers' Perceptions of the Thilawa Special Economic Zone Implementation

In this section, SEZ workers' attitude towards the implementation of the Thilawa SEZ is presented, focusing specifically on their perceptions of employment opportunities. According to Table 4.4, the current employment locations of SEZ workers are categorized accordingly.

The job distribution of SEZ workers reveals big differences in employment across different sectors. The most common job is at MITT, with 48 workers making up 32.0% of the total workforce. This suggests that MITT is a major employer in the SEZ, likely providing more job opportunities or better working conditions or pay. On the other hand, companies like Danko and Elittle employ only 1 worker each, making up just 0.7% of the workforce. This small number might be because these companies are smaller, in niche industries, or offer less competitive jobs. The large difference between the most and least represented jobs shows the varied scale and impact of different employers in the SEZ, highlighting the diverse economic activities and job opportunities available.

Table (4.4) Current Employment Locations of SEZ Workers

Particular	Frequency	Percent
Waimar	7	4.7
Lighting Myanmar	14	9.3
ATSUMR	4	2.7
Backpack factory	2	1.3
Blackarrow	3	2.0
Canned Fish Factory	4	2.7
Danko	1	.7
DustomAmava	5	3.3
Earphone	2	1.3
Elittle	1	.7
Foster Electric	8	5.3
Fumer Killer Industry	5	3.3
Garment	5	3.3
Guston Morva	7	4.7
Hansae Myanmar	15	10.0
Hensea	7	4.7
Indorama Myanmar	2	1.3
Lutha	5	3.3
MITT	48	32.0
Radiator Factory	5	3.3
Total	150	100.0

Source: Survey data, 2024 (May)

Table (4.5) describes current Position of SEZ Workers, highlighting the distribution of workers across various roles within the Thilawa Special Economic Zone (SEZ).

Table (4.5) Current Roles of SEZ Workers

Particular	Frequency	Percent
Factory (workers)	57	38.0
Factory (Staff)	46	30.7
Cleaning worker	6	4.0
Manager	1	.7
Other	40	26.7
Total	150	100.0

Source: Survey data, 2024 (May)

According to the survey data, A notable 38.0% of the workers are in factory positions, reflecting the significant industrial activities within the SEZ. Factory staff, which includes technical and administrative roles, make up 30.7% of the workforce, suggesting a substantial portion of workers are involved in supporting the operational functions of factories. Cleaning workers comprise 4.0%, highlighting the necessity of maintenance and cleanliness in the industrial environment. Managers, although a small group at 0.7%, play a critical role in overseeing operations and ensuring efficiency. The category labeled “Other” accounting for 26.7% of the workers, includes various unspecified roles, indicating a diverse range of job functions essential to the SEZ’s operations.

Table 4.6 illustrates the data on the duration of employment at the Thilawa Special Economic Zone (SEZ), revealing significant insights into the workforce dynamics.

Table (4.6) Commencement of Employment for SEZ Workers

Particular	Frequency	Percent
Under six months	10	6.7
6 months between 1 year	32	21.3
Above 1 year	108	72.0
Total	150	100.0

Source: Survey data, 2024 (May)

The majority of workers, accounting for 72.0%, have been employed at the SEZ for over one year. This statistic underscores the establishment’s ability to sustain long-term employment opportunities, indicating a stable and potentially reliable source of income for a significant portion of the workforce. In contrast, 6.7% of workers have been employed for under six months, suggesting a smaller, more recent influx into the workforce. This variability in employment duration highlights the SEZ’s role in both immediate job creation and its capacity to provide enduring employment opportunities, crucial for assessing its socio-economic impact on the community over time.

Table (4.7) Sources to Find the Job by Respondents

Particular	Frequency	Percent
Friend who is working in the factory	85	56.7
Family member who is working in Thilawa SEZ	18	12.0
From CSR Officer of OSSC	2	1.3
Employment Agency	3	2.0
From Public Board	42	28.0
Total	150	100.0

Source: Survey data, 2024 (May)

Table (4.7) provides insights into the primary channels through which individuals secure employment at the Thilawa Special Economic Zone (SEZ). The most prevalent method, accounting for 56.7% of responses, is through a friend already employed within the SEZ. This suggests a significant reliance on informal networks and word-of-mouth referrals within the community. In contrast, the least utilized method, at 1.3%, is through the Corporate Social Responsibility (CSR) Officer of the SEZ's Operating SEZ Service Company (OSSC), indicating a minimal direct engagement with formal CSR channels for job placement. Additionally, 28.0% of individuals find employment opportunities through public boards, reflecting a moderate reliance on more formalized job advertisements or announcements. The disparity between these figures underscores the predominant role of personal connections and informal channels in accessing job opportunities within the SEZ, which is crucial for understanding the socio-economic dynamics and potential disparities in access to employment opportunities post-SEZ establishment.

Table (4.8) Perception on Job by Respondents

Particular	Frequency	Percent
Easy	29	19.3
Not easy	76	50.7
Difficult	44	29.3
Nothing	1	.7
Total	150	100.0

Source: Survey data, 2024 (May)

Regarding Table (4.8), Workers in the Thilawa Special Economic Zone (SEZ) hold diverse views on job searching. A majority, 50.7%, find it challenging to secure jobs, indicating perceived barriers. Conversely, 19.3% consider job searching easy, suggesting some find it straightforward. Meanwhile, 29.3% find it difficult, indicating significant hurdles. A small percentage, 0.7%, expressed no opinion. These findings reveal varied experiences among SEZ workers regarding job search ease, crucial for understanding workforce dynamics and potential socio-economic impacts.

According to the survey data, whether they have Employment contracts for their job are described in Table (4.9).

Table (4.9) Employment Contract for the Job by Respondents

Particular	Frequency	Percent
Yes	65	43.3
No	85	56.7
Total	150	100.0

Source: Survey data, 2024 (May)

Table (4.9) shows that 43.3% of workers have a formal job contract, while 56.7% do not. This big difference suggests that many workers lack legal protection and job security in the Thilawa SEZ. Those without formal contracts may face uncertainties about their rights and job stability. This situation could affect how people work and their economic situation in the SEZ. It's important to understand these differences to improve job conditions and support workers' rights through better policies and support systems.

Table (4.10) focuses on the current salaries of SEZ workers based on their responses.

Table (4.10) Current Salary by Respondents

Particular	Frequency	Percent
0 – 100,000Kyats	1	.7
100,001 – 200,000Kyats	22	14.7
200,001 – 300,000Kyats	110	73.3
300,001 – 400,000Kyats	16	10.7
400,001 – 500,000Kyats	1	.7
Total	150	100.0

Source: Survey data, 2024 (May)

The majority, 73.3%, earn between 200,001 and 300,000 Kyats, indicating this range is most common. This suggests wages are clustered around this amount, possibly due to job roles or pay structures in the SEZ. Another 14.7% earn between 100,001 and 200,000 Kyats, reflecting a significant group with lower incomes. Meanwhile, 10.7% earn between 300,001 and 400,000 Kyats, showing a smaller but noteworthy segment with higher earnings. These findings reveal income diversity among SEZ workers, crucial for understanding economic impacts and income distribution in the community affected by the SEZ.

Table (4.11) Receiving Type of Currency by respondents

Particular	Frequency	Percent
Myanmar Kyat	148	98.7
China Yuan	2	1.3
Total	150	100.0

Source: Survey data, 2024 (May)

The data from Table (4.11) shows that almost all SEZ workers, 98.7%, are paid in Myanmar Kyat, reflecting a strong connection to the local economy in the Thilawa Special Economic Zone (SEZ). In contrast, only a very small percentage, 1.3%, receive their wages in Chinese Yuan, indicating minimal use of foreign currency for wages.

This difference highlights the SEZ's focus on local economic practices and regulations, likely influenced by government policies. Understanding these financial details helps to grasp how the SEZ operates economically and its impact locally and internationally.

Table (4.12) Receiving Bonuses by respondents

Particular	Frequency	Percent
Yes	67	44.7
No	83	55.3
Total	150	100.0

Source: Survey data, 2024 (May)

Table (4.12) presents data on bonus distribution among respondents, showing that 44.7% received a bonus while 55.3% did not. This reveals bonuses are somewhat common in this study's context, influencing how employees perceive fairness and rewards. Those not receiving bonuses, comprising 55.3%, may face impacts on job satisfaction and financial stability. This data provides insights into economic well-being and workforce motivations within the community or organization studied, highlighting the importance of understanding bonus practices for equitable employment outcomes.

Table (4.13) Coming to Thilawa SEZ by Respondents

Particular	Frequency	Percent
Bicycle/ Cycle	19	12.7
Walking	3	2.0
Ferry	112	74.7
Company Car	7	4.7
Own Car	1	.7
Bus	8	5.3
Total	150	100.0

Source: Survey data, 2024 (May)

Table (4.13) offers significant insights into transportation patterns among commuters heading to the Thilawa Special Economic Zone (SEZ). The data reveals that the ferry is the predominant mode of transportation, used by 74.7% of respondents, highlighting the importance of water routes likely influenced by geographic proximity.

Bicycles account for 12.7%, reflecting an eco-friendly choice possibly linked to SEZ environmental policies or accessibility. Buses and company cars constitute smaller percentages at 5.3% and 4.7%, respectively, while walking and private cars are less common at 2.0% and 0.7%. This data is crucial for planning infrastructure and promoting sustainable transportation within the SEZ.

Table (4.14) Total Time Spent Commuting by Respondents

Time	Frequency	Percent
30 minutes	99	66.0
45 Minutes	27	18.0
One Hour	21	14.0
Two Hours	3	2.0
Total	150	100.0

Source: Survey data, 2024 (May)

Table (4.14) presents significant data on the total commute time to workplaces within the Thilawa Special Economic Zone (SEZ). The majority of respondents, comprising 66.0% of the sample, reported a commute time of 30 minutes. This finding is crucial as it indicates that a significant portion of the workforce spends a considerable amount of time commuting to their workplaces within the SEZ. Furthermore, 18.0% of respondents reported a commute time of 45 minutes, while 14.0% indicated a commute time of one hour. Only a small percentage, 2.0%, reported a longer commute time of two hours. These statistics underscore the varying commute durations among workers in the SEZ, highlighting potential challenges related to transportation infrastructure, accessibility, and the impact of commuting on productivity and quality of life. Understanding these commute patterns is essential for assessing the SEZ's socio-economic impact, particularly in terms of workforce efficiency and urban planning considerations.

Table (4.15) Receiving Job Training by Respondents

Particular	Frequency	Percent
Yes	141	94.0
No	9	6.0
Total	150	100.0

Source: Survey data, 2024 (May)

Table (4.15) presents data on job training participation among workers in the study on the Thilawa Special Economic Zone (SEZ). A significant majority, 94.0%, reported receiving job training, indicating a proactive engagement with skill development opportunities provided by the SEZ or related initiatives. In contrast, a small proportion, 6.0%, indicated not having received any job training. This disparity underscores the potential impact of training programs on enhancing employment readiness and skill acquisition within the community. The high percentage of participants in job training suggests a positive response to capacity-building efforts associated with the SEZ, likely contributing to improved socio-economic prospects and adaptability among individuals involved in the SEZ's activities. Understanding these training dynamics is crucial for assessing the SEZ's overall socio-economic impact on the local workforce and community development.

4.3.3 Workers Expected on Benefit and Challenges on Thilawa SEZ

One significant outcome of SEZs has been the development of human capital through skill enhancement. Many respondents anticipated receiving additional training through their jobs and encountered both challenges and benefits at the Thilawa SEZ, where they acquired diverse skills. These findings are detailed in Table (4.16).

Table (4.16) Workers Expected on Benefit and Challenges on Thilawa SEZ

Expect to further training	Number of Respondents	Percent
Yes	136	90.7
No	14	9.3
Total	150	100.0
Challenges of the Thilawa SEZ	Number of Respondents	Percent
Working under Foreign Management	32	21.3
Management rick	1	.7
Working Hours	12	8.0
Do not understand Language	2	1.3
Don't Know	103	68.7
Total	150	100.0
Benefit upon Thilawa SEZ	Number of Respondents	Percent
Close to home	46	30.7
benefit of working	5	3.3
Good management	7	4.7
New experience	82	54.7
Nothing	10	6.7
Total	150	100.0
Learning Skill at Thilawa SEZ	Number of Respondents	Percent
Production Skill	55	36.7
Sewing Skill	34	22.7
Operate/ repair new machine	14	9.3
Finance and accounting skill	13	8.7
Nothing	34	22.7
Total	150	100.0

Source: Survey Data 2024 (May)

Their expectations for training after joining the company show a significant interest among respondents, with 90.7% expressing a desire for training opportunities. This indicates a strong emphasis on professional development and skill enhancement

within the organization. Conversely, 9.3% of respondents had no expectations for training upon joining, suggesting a minority perception that highlights potential areas for improved communication and development alignment. The overall majority expectation for training reflects a proactive approach to employee growth, likely contributing to increased job satisfaction, skill improvement, and enhanced organizational effectiveness.

In terms of challenges faced by workers in the Thilawa SEZ, it reveals that a significant majority, 68.7%, perceive few obstacles in their work environment. Notably, 21.3% mentioned difficulties with foreign management, indicating potential cultural and managerial adjustment issues. Logistics also pose a challenge, with 8.0% citing long commutes. Language barriers were noted by 1.3%, affecting communication and integration. Only 0.7% expressed security concerns. These insights highlight varied challenges impacting worker experiences in the SEZ, influencing socio-economic dynamics in the region.

Regarding the biggest benefits, 54.7% of SEZ workers value "Management" highly, indicating perceived effective practices contributing to organizational efficiency. Additionally, 30.7% appreciate the proximity to home, enhancing convenience and work-life balance. Smaller percentages highlight benefits like new experiences (6.7%), good salary (3.3%), and general positivity (4.7%). These findings suggest that while effective management and proximity to home are major drivers of job satisfaction, other factors such as salary and new experiences also influence workers' perceptions within the SEZ.

For the skills learned at the Thilawa SEZ, workers reveal significant insights into workforce development. The data shows that 36.7% of workers acquired Production Skills, indicating a strong focus on industrial capabilities. Sewing Skills were obtained by 22.7%, highlighting growth in textile manufacturing expertise. A notable 9.3% gained proficiency in operating new machinery, reflecting technological training. Financial and accounting skills were learned by 8.7%, enhancing financial literacy. However, 22.7% reported no new skills, suggesting potential training gaps. This data underscores the SEZ's impact on skill diversity and varying skill acquisition levels, crucial for understanding its socio-economic influence.

4.3.4 Analysis of Job Opportunities Perception on Thilawa SEZ

This section presents a study on respondents' perceptions of the implementation of the Thilawa SEZ, focusing on their attitudes towards employment opportunities. Table (4.17) displays the results of this survey, highlighting SEZ workers' perceptions of various aspects related to employment within the SEZ.

Table (4.17) Workers' Job Opportunities Perception on Thilawa SEZ

Statement	Mean	Standard Deviation
There are more job opportunities due to the development of the SEZ.	3.99	.640
Before, people had to leave to find employment. Now they can find local employment due to the development of the SEZ.	3.87	.658
Residents are readily able to access job opportunities at the SEZ.	3.91	.617
Wages are good at the SEZ.	3.57	.893
Employment terms and conditions are good at the SEZ.	3.99	.142
Overall	3.87	0.468

Source: Survey Data 2024 (May)

According to Table (4.17), respondents generally believe that the development of the SEZ has led to more job opportunities, with a mean score of 3.99. This indicates a positive perception among the surveyed individuals regarding employment prospects created by the SEZ. Additionally, the data shows that before the SEZ, people often had to seek employment elsewhere, but now they can find local jobs, as evidenced by a mean score of 3.87. This suggests a perceived improvement in local employment accessibility due to the SEZ's presence. Furthermore, respondents feel that local residents have good access to job opportunities within the SEZ, with a mean score of 3.91. This reflects a positive perception of job accessibility for community members. However, opinions about wages (mean = 3.57) and employment terms and conditions (mean = 3.99) show more variation, indicating mixed views on these aspects. Overall, the table highlights positive perceptions regarding increased job opportunities and improved local

employment accessibility attributed to the Thilawa SEZ, while also indicating areas for potential improvement in wage levels and employment conditions.

4.3.5 Key Informant Interviews (KII) on Perceptions of Thilawa SEZ: Insights from Township, Government, Wards, Villages, and Administration

The Thilawa SEZ represents a significant development initiative aimed at bolstering economic growth and employment opportunities in the region. To gain a comprehensive understanding of the local perceptions, key informant interviews were conducted with representatives from various administrative levels, including townships, wards, villages, and government departments. This study provides valuable insights into the viewpoints and experiences of these stakeholders, offering a perception on the socio-economic impacts and opportunities associated with the Thilawa SEZ.

Table (4.18) Key Information Interviews (KII) from Township Level Head of Department and Wards/Villages Tract Administrators

Township	Position	Number of Heads	Percent
Thanlyin	Township Level Head of Department	4	50
Kyauktan	Township Level Head of Department ⁴	4	50
Total		8	100
Township	Ward/Village Tract	Number of Wards/Villages	Percent
Thanlyin	12	12	33
Kyauktan	24	14	67
Total		36	100

Source: Survey Data 2024 (May)

Table (4.18) presents perceptions about the Thilawa SEZ from respondents at the Township level, Ward/Village Tract/Administration level, totaling 44 individuals. The contentment survey, divided into 9 sections, aimed to assess respondents' views on employment opportunities within the SEZ. The sample consisted of 44 people: 8 from Township-level Heads of Department in Thanlyin and Kyauktan, 12 from Ward/Village Tract Administrators in Thanlyin, and 24 from Ward/Village Tract Administrators in Kyauktan.

Table (4.19) Opportunities Perceptions on Thilawa SEZ from Township Level Heads of Department and Wards/Villages Tract Administrators

SN	Particulars	Mean	SD
1	Thilawa SEZ has a positive relationship with the community	4.08	0.289
2	I receive enough information about Thilawa SEZ's plans and activities	4.12	0.350
3	I have the opportunity to provide feedback on or about Thilawa SEZ's plans and activities	4.08	0.289
4	Thilawa SEZ's communications with the community are open and honest	4.42	0.515
5	Thilawa SEZ's social and environmental performance is better than other industrial zones in Yangon Region	4.25	0.452
6	Thilawa SEZ is creating long-term value for the community and Yangon Region's economy	4.32	0.540
7	Thilawa SEZ's social investment projects make a positive contribution to the livelihoods of people	4.25	0.452
8	Thilawa SEZ makes a greater contribution to the community than other industrial zones in the Yangon Region.	4.42	0.515
9	Thilawa SEZ makes a greater contribution to the community than other industrial zones in Myanmar.	4.5	0.522
Overall		4.27	0.436

Source: Survey Data 2024 (May)

According to the table (4.19), the overall mean score for the opportunities perception on Thilawa SEZ is 4.27. This indicates that, from the viewpoints of Township Level Head of Department and Ward/Village Tract Administrators, the economic zone is seen positively. Most employees believe that Thilawa SEZ contributes more significantly to the community than other industrial zones in Myanmar, with an average score of 4.5. Furthermore, Thilawa SEZ is perceived to have open and honest communication with the community and is seen as making a greater contribution to the community than other industrial zones in the Yangon Region, with

an average score of 4.42. Additionally, Thilawa SEZ is recognized for creating long-term value for the community and the economy of the Yangon Region, with an average score of 4.32. The SEZ is also noted for having a positive relationship with the community, and employees feel they have the opportunity to provide feedback on Thilawa SEZ's plans and activities, with an average score of 4.08.

4.3.6 Perception of Township Level Head of Department and Wards/Villages Tract Administrators on Infrastructure and Services Provision

This section reveals the survey data collected from Township Level Head of Department and Wards/Villages Tract Administrators and their significant insights into the infrastructure and services provision in the Thilawa SEZ area.

Table (4.20) Perception of Township Level Head of Department and Ward/Village Tract Administrators on Infrastructure and Service Provision

Particular	Increased		Default	
	Frequency	Percent	Frequency	Percent
Schools	19	43.2	25	56.8
Health facilities	12	27.3	32	72.7
Roads	32	72.7	12	27.3
Bridges	19	43.2	25	56.8
Water Supply	19	43.2	25	56.8
Power Supply	25	56.8	19	43.2
Pagoda/temple/church/mosque	14	31.8	30	68.2

Source: Survey Data 2024 (May)

According to the survey data, there is a noticeable increase in the frequency of improved infrastructure and services. Schools and bridges, for example, show an increase, indicating a positive trend in educational and transport facilities. Health facilities and religious institutions like pagodas, temples, churches, and mosques also show improvements, suggesting that the community's well-being and spiritual needs are being addressed. Additionally, roads and water supply have seen increased frequency, which is crucial for daily commutes and basic living standards. Power

supply has also improved, ensuring better energy access for the community. These improvements reflect a concerted effort to enhance the living conditions and overall development of the Thilawa SEZ area.

4.3.7 Key Informant Interviews on Perceptions of Thilawa SEZ: Insights from General Stakeholders

This section presents the perceptions of key General Stakeholders regarding the Thilawa Special Economic Zone (SEZ). It presents the opinions of 30 Stakeholders, gathered through a sample survey conducted with representatives from various significant entities. These entities include the Thanlyin District General Administration Department (GAD), the Japan International Cooperation Agency Team, Myanmar Japan Thilawa Development Limited (MJTD), the One Stop Service Center (OSSC), and the Thilawa SEZ Management Committee (ISMCC). By exploring these perceptions, the study aims to provide a comprehensive understanding of the Stakeholders' views on the development and impact of the Thilawa SEZ.

According to the findings presented in Table (4.21), the average perception scores indicate favorable views toward Thilawa SEZ's infrastructure and services provision, with a mean score of 4.2. This suggests a strong perception that Thilawa SEZ contributes significantly more to the community compared to other industrial zones in the Yangon Region, as evidenced by an average score of 4.52. Moreover, Stakeholders perceive Thilawa SEZ's communication with the community as open and honest, reflected in an average score of 4.42.

Table (4.21) Opportunities Perceptions on Thilawa SEZ from General Stakeholders

SN	Particulars	Mean	SD
1	Thilawa SEZ has a positive relationship with the community	3.95	0.28
2	Thilawa SEZ has a positive relationship with the community	4.11	0.650
3	I have the opportunity to provide feedback on or about Thilawa SEZ's plans and activities	4.00	0.16
4	Thilawa SEZ's communications with the community are open and honest	4.42	0.515
5	Thilawa SEZ's social and environmental performance is better than other industrial zones in Yangon Region	4.3	0.54
6	Thilawa SEZ is creating long- term value for the community and Yangon Region's economy	4.08	0.60
7	Thilawa SEZ's social investment projects make a positive contribution to the livelihoods of people	4.22	0.752
8	Thilawa SEZ makes a greater contribution to the community than other industrial zones in the Yangon Region.	4.52	0.3
9	Thilawa SEZ makes a greater contribution to the community than other industrial zones in Myanmar.	4.25	0.389
Overall		4.27	0.436

Source: Survey Data 2024 (May)

Additionally, Thilawa SEZ's social and environmental performance is perceived to be superior to other industrial zones in Yangon Region, with an average score of 4.3 and a standard deviation of 0.54. However, Stakeholders perceive Thilawa SEZ's relationship with the community slightly less positively, with an average score of 3.95 and a standard deviation of 0.28. These findings underscore the perceived strengths and areas for improvement in Thilawa SEZ's interactions and contributions within its community and the broader industrial landscape of Yangon Region.

4.3.8 Perception of General Stakeholders on Infrastructure and Services Provision

This section captures the perceptions of 30 General Stakeholders regarding their views on infrastructure and service provision. The data from Table (4.22) reveals significant improvements in infrastructure and service provision since the establishment of the Thilawa SEZ, as perceived by 30 General Stakeholders surveyed.

Table (4.22) Perception of General Stakeholders on Infrastructure and Services Provision

Particular	Increased		Default	
	Frequency	Percent	Frequency	Percent
Schools	10	33.3	20	66.7
Health facilities	7	23.3	23	76.7
Roads	22	73.3	8	26.7
Bridges	10	33.3	20	66.7
Water Supply	10	33.3	20	66.7
Power Supply	20	66.7	10	33.3
Pagoda/temple/church/mosque	9	30	21	70

Source: Survey Data 2024 (May)

According to the survey result, there has been a substantial increase in the number of schools and health facilities, with 33.3% reporting more schools and 23.3% noting improved health facilities. Roads and power supply have also seen marked enhancements, with 73.3% and 66.7% of Stakeholders, respectively, acknowledging improvements in these areas. Conversely, while progress has been noted, challenges remain evident in certain sectors such as bridges, water supply, and religious infrastructure, where Stakeholders reported varying levels of improvement. These findings underscore the SEZ's positive impact on local infrastructure development, yet highlight ongoing needs that warrant continued attention and investment. Such improvements are crucial for fostering economic growth and enhancing quality of life within the SEZ and surrounding communities.

4.3.9 Socio-Economic Impact of Special Economic Zone (SEZ) identified by Township Level Head of Department, Ward/Village Tract Administrators and General Stakeholders

This section presents a comparative analysis of the socio-economic impacts of the Thilawa Special Economic Zone (SEZ) based on the perceptions of 30 General Stakeholders and 44 township-level heads of Department and Ward/Village Tract Administrators. It examines a range of factors including social, economic, and environmental impacts perceived since the establishment of the SEZ. The data highlights both positive outcomes such as improved infrastructure, increased job opportunities, and better health and education outcomes, as well as concerns related to environmental issues like pollution and increased traffic. This analysis aims to provide a nuanced understanding of how the SEZ has influenced local communities and Stakeholders, reflecting on both the benefits and challenges associated with its development.

According to Table (4.23), the data from both Township Level Head of Department and Ward/Village Tract Administrators, as well as General Stakeholders, highlights several key socio-economic impacts of the Thilawa Special Economic Zone (SEZ). In terms of social impact, there is a widespread acknowledgment of improved infrastructure and social services, with 43 Township Level Heads of Department and 30 General Stakeholders affirming these improvements. Additionally, better health and education outcomes are noted by a significant number of respondents, indicating a positive shift in community well-being due to SEZ development initiatives.

Table (4.23) A Comparative Analysis of the Socio-economic Impacts of the Thilawa Special Economic Zone (SEZ)

Benefit on SEZ	Particulars	Heads of Township and Ward/Village Tract	General Stakeholders
		Yes	Yes
Social Impact	Improved infrastructure	43	30
	Improved social services	42	30
	Better health outcomes	41	28
	Better education outcomes	41	30
	Increased crime/reduced security	2	0
	Reduced health outcomes	0	0
	Reduced education outcomes	0	0
Economic Impact	Improved training in skills development opportunities	43	30
	Increased job opportunities	44	30
	Increased business opportunity	44	30
	Higher wages for workers	42	28
	Increased cost of goods	41	30
Environmental impact	Improved waste management	41	30
	Higher population	41	28
	Higher numbers of outsiders	42	29
	Increased traffic	42	30
	Lost of land/resettlement	39	26
	Dust issues/air pollution	8	4
	Noise issues	7	4
	Pollution (e.g. water, soil etc.,)	7	30
	Restricted access	0	2

Source: Survey Data 2024 (May)

Economically, the SEZ has evidently boosted training opportunities and job creation, supported by 43 heads of township and 30 General Stakeholders recognizing improved skills development and increased job opportunities. The rise in business opportunities and higher wages for workers further underscores the economic benefits perceived by stakeholders.

However, concerns regarding environmental impacts are also evident. Issues such as increased traffic, dust, air pollution, and pollution of water and soil are acknowledged, albeit to varying degrees among respondents. For instance, dust and noise issues are reported by a minority but a notable number of stakeholders, highlighting environmental challenges associated with rapid industrial development.

To sum up, while the Thilawa SEZ has brought substantial socio-economic benefits, including enhanced infrastructure, services, and economic opportunities, it also necessitates careful management of environmental impacts to sustain long-term benefits for local communities and stakeholders.

CHAPTER V

CONCLUSION

This section provides a summary of the key findings and offers suggestions based on the study of the Thilawa Special Economic Zone (SEZ). The findings indicate significant improvements in local infrastructure, services, and the socio-economic status of the community since the SEZ's establishment. Enhancements in schools, health facilities, roads, bridges, water supply, power supply, and religious infrastructure have been noted. Additionally, the SEZ has positively impacted job opportunities, wages, and business growth. However, some environmental challenges remain, such as increased traffic and pollution. The suggestions provided aim to address these challenges and further enhance the benefits of the SEZ for the local community.

5.1 Findings

The study sought to assess the current state of the Thilawa SEZ and determine the community's socioeconomic position following its establishment. The survey results present a comprehensive overview of both the infrastructure developments and the socio-economic impacts experienced by the local community.

The establishment of the Thilawa SEZ has led to significant improvements in local infrastructure and services. Survey data from 30 General Stakeholders highlight notable enhancements across various sectors: 66.7% of respondents reported an increase in the number of schools, 76.7% acknowledged improvements in health facilities, and 73.3% noted better road infrastructure. Additionally, 66.7% recognized enhancements in bridges, water supply, and power supply, while 70% observed improvements in religious facilities such as pagodas, temples, churches, and mosques. These findings suggest that the SEZ has positively impacted the community by upgrading essential services and infrastructure.

These findings suggest that the SEZ has positively impacted local infrastructure development, facilitating economic growth and improving the quality of life for the

community. However, certain sectors like bridges and water supply still face challenges, indicating areas that require ongoing investment and attention.

The socio-economic impact of the Thilawa SEZ was assessed through the perceptions of 30 General Stakeholders and 44 township-level heads of Department and Ward/Village Tract Administrators. The data highlighted several key impacts across social, economic, and environmental dimensions:

Social Impact: A substantial number of General Stakeholders and the Township Level Head of Department affirmed improvements in infrastructure and social services. Better health and education outcomes were reported, indicating a positive shift in community well-being due to SEZ development initiatives.

Economic Impact: The SEZ has significantly increased job opportunities, with 44 township heads and 30 General Stakeholders acknowledging this benefit. The rise in business opportunities and higher wages for workers further underscore the economic benefits perceived by stakeholders. Improved training and skills development opportunities were noted, highlighting the SEZ's role in enhancing the workforce's capabilities.

Environmental Impact: Improved waste management and higher population were recognized by 41 township heads and 30 General stakeholders. However, issues such as increased traffic, dust, air pollution, and pollution of water and soil were also reported, albeit to varying degrees among respondents. Dust and noise issues, though reported by a minority, highlight environmental challenges associated with rapid industrial development.

The SEZ's impact on the local environment necessitates careful management to sustain long-term benefits for the community. While socio-economic improvements are evident, environmental concerns must be addressed to ensure sustainable development.

In terms of SEZ Workers, their perceptions towards the implementation of the Thilawa SEZ were also examined. The job distribution among SEZ workers shows a diverse range of employment across different sectors. A notable 38.0% of workers are in factory positions, while 30.7% are factory staff, indicating significant industrial activities.

For duration of employment, the majority of workers have been employed at the SEZ for over one year, reflecting the establishment's ability to sustain long-term employment opportunities. These findings underscore the SEZ's role in providing

diverse job opportunities and sustaining long-term employment, contributing to the economic stability of the community.

Key informant interviews with 30 General Stakeholders from entities provided additional insights. Stakeholders expressed favorable views towards Thilawa SEZ's infrastructure and services provision. The SEZ's communication with the community was perceived as open and honest, indicating a positive relationship between the SEZ and the local community. The SEZ was rated higher in terms of social and environmental performance compared to other industrial zones in the Yangon Region, reflecting its significant contribution to the community and regional economy.

The Thilawa SEZ has had a substantial impact on the local community, bringing significant improvements in infrastructure, job opportunities, and overall socio-economic conditions. While the SEZ has fostered economic growth and enhanced quality of life, ongoing efforts are needed to address environmental challenges and ensure sustainable development. The positive perceptions from various stakeholders highlight the SEZ's role in driving regional development, although continuous attention to infrastructure and environmental management is crucial for maintaining and enhancing these benefits.

5.2 Suggestions

Based on the survey results, several suggestions can be made to enhance the socio-economic benefits of the Thilawa SEZ for the local community. First, while the SEZ has generated numerous job opportunities, further emphasis should be placed on vocational training and skills development to ensure that the local workforce is well-equipped to meet the demands of emerging industries. This could involve partnerships with educational institutions and training centers to provide targeted programs that align with industry needs.

Second, there should be continued efforts to improve wages and working conditions within the SEZ. Ensuring fair wages and safe, healthy working environments are not only benefit workers but also contribute to higher productivity and job satisfaction. Regular monitoring and compliance checks can help maintain standards and address any issues promptly.

Third, addressing environmental concerns is crucial for sustainable development. The SEZ should invest in green technologies and infrastructure to mitigate pollution and manage waste effectively. Initiatives such as tree planting,

renewable energy projects, and improved waste management systems can significantly reduce the environmental footprint of industrial activities.

Lastly, enhancing community engagement and communication is vital. Establishing regular forums for dialogue between SEZ authorities, businesses, and residents can help ensure that community needs and concerns are addressed. This inclusive approach fosters a stronger, more resilient relationship between the SEZ and the local community, ultimately contributing to the overall socio-economic well-being of the area.

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APPENDICES

Appendix-1

I. THILAWA SPECIAL ECONOMIC ZONE's WORKERS

Section (A): Personal Information

- 1 Age _____
- 2 Gender Male Female
- 3 Marital Status Married Single Divorced
 Widowed
- 4 Township/ village where you live _____
-
- 5 Do you live with your family? Yes No
- 6 Highest level of education completed Able reading and writing Primary Level
 Middle School Level High School Level
 University Level

Section (B): Current Job

- 14 Name of the current job _____
- 15 Current position Factory worker (Production)
 Factory (Staff)
 Cleaning worker
 Manager
 Other
- 16 When did you start working at this company? Under Six months
 6 months between 1 year
 Above 1 year
- 17 How to find this job? A friend who is working in the factory
 A family member who is working in Thilawa SEZ
 To apply OSSC
 From the CSR Officer of OSSC
 Employment Agency
 From Public Board

- 18 Your view of searching for a job Easy Not Easy
 Difficult Nothing
- 19 Do you have employment Yes
contract for this job? No
- 20 Current salary 0 – 100,000Kyats
 100,001 – 200,000Kyats
 200,001 – 300,000Kyats
 300,001 – 400,000Kyats
 400,001 – 500,000Kyats
 Above 500,000Kyats
- 21 Received type of currency Myanmar Kyat Japan Yen
 China Yuan US Dollar
 Other
- 22 Do you get the bonus? Yes
 No
- 23 How many holidays do you get? _____ Days
- 24 How to come to Thilawa SEZ Bicycle/ Cycle Walking
from your house? Ferry Company Car
 Own Car Bus
- 25 What is the total commute time Half of an hour 45 Minutes
Per day (coming to Thilawa plus One Hour Two Hours
Returning home)
- 26 Do you receive the job training? Yes
 No
- 27 Do you expect to receive training Yes
after you join this company? No

- 28 Which fact is the biggest the challenge of working at the SEZ?
- Working under Foreign
 - Management Feel risk
 - Long commute
 - Do not understand Language
 - Nothing
- 29 Which fact is the biggest the benefit of working at the SEZ?
- Close to home
 - Good salary
 - Good
 - Management
 - New experience
 - Nothing
- 30 What are the skills you have learned (or are hoping to learn) at the SEZ?
- Production Skill
 - Sewing Skill
 - Operate/repair new machine
 - Finance and accounting skill
 - Nothing

Section (C): Could you please rate each of the below statements using the following scale:

No.	Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	There are more job opportunities due to the development of the SEZ.					
2	Before, people had to leave to find employment. Now they can find local employment due to the development of the SEZ.					
3	Residents are readily able to access job opportunities at the SEZ.					
4	Wages are good at the SEZ.					
5	Employment terms and conditions are good at the SEZ.					

**II. Key Informant Interview–Township Level Head of Department/Ward/
Village Tract Administrators**

- 1 Gender Male Female
- 2 Position _____
- 3 Township _____
- 4 Ward/ Village Tract _____

Section (A): Could you please rate each of the below statements using the following scale:

No.	Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	Thilawa SEZ has a positive relationship with the community					
2	I receive enough information about Thilawa SEZ's plans and activities					
3	Thilawa SEZ's communications with the community are open and honest					
4	Thilawa SEZ's social and environmental performance is better than other industrial zones in Yangon Region					
5	Thilawa SEZ is creating long-term value for the community and Thanlyin and Kyauktan Townships					
6	Thilawa SEZ is creating long-term value for the community and Yangon Region's economy.					

No	Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
7	Thilawa SEZ's social investment projects make a positive contribution to the livelihoods of people.					
8	Thilawa SEZ makes a greater contribution to the community than other industrial zones in Yangon Region.					
9	Thilawa SEZ is creating better long-term value for the community and country than other economic zones in Myanmar.					

Section (B): Infrastructure and Services Provision

No.	Statement	Improved	Original	Note
	(A) <u>Infrastructure and Services</u>			
1	Schools			
2	Health facilities			
3	Roads			
4	Bridges			
5	Water Supply			
6	Power Supply			
7	Pagoda/temple/church/mosque			
8	Other (please describe)			

No	Statement	Yes	No	Note
	<u>(B) Impacts</u>			
	<u>B-1. Social Impacts</u>			
1	Improved infrastructure (e.g., road upgrades, new health or education facilities, new telecommunications infrastructure, etc)			
2	Improved social services (e.g., greater access to health professionals, more education choices for children, etc)			
3	Better health outcomes			
4	Better education outcomes			
5	Increased crime / reduced security			
6	Reduced health outcomes			
7	Reduced education outcomes			
	<u>B-2. Economic Impacts</u>			
8	Improved training and skills development opportunities			
9	Increased job opportunities			
10	Increased business opportunities			
11	Higher wages for workers			
12	Increased cost of goods			
	<u>B-3. Environmental Impacts</u>			
13	Improved waste management			
14	Higher population			
15	The higher number of outsiders			
16	Increased traffic			
17	Loss of land/resettlement			
18	Dust issues/air pollution			
19	Noise issues			
20	Pollution (e.g., water, soil, etc)			
21	Restricted access (e.g., cut-off from neighboring communities, services, markets, farmlands, etc)			

Section (C): Which Village Tracts/Wards in your Township/ Village Tract/Ward have been/are being affected by land acquisition for the Thilawa SEZ:

- 1 Zone A/Phase 1 Development
- 2 Zone B Area 2-1 Development
- 3 Zone B Area 2-2 Development
- 4 Remaining areas of the SEZ (not yet confirmed to be developed)

Section (D): What are the most common community complaints about the SEZ?

No	Statement	Yes	No
1	Loss of land/ resettlement /compensation		
2	Environmental pollution		
3	Lack of job opportunities		
4	Traffic congestion/accidents		
5	Increased cost of goods/services/living		
6	Other (please describe)		

Section (E): Is there any other information you would like to share with us?

- 1 -----
- 2 -----
- 3 -----

III. Key Informant Interview – General Stakeholders

1 Gender Male Female

2 Position _____

Section (A): Could you please rate each of the below statements using the following scale:

No.	Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1	Thilawa SEZ has a positive relationship with the community.					
2	I receive enough information about Thilawa SEZ's plans and activities.					
3	Thilawa SEZ's communications with the community are open and honest.					
4	Thilawa SEZ's social and environmental performance is better than other industrial zones in the Yangon Region.					
5	Thilawa SEZ is creating long-term value for the community and Thanlyin and Kyauktan Townships.					
6	Thilawa SEZ is creating long-term value for the community and Yangon Region's economy.					

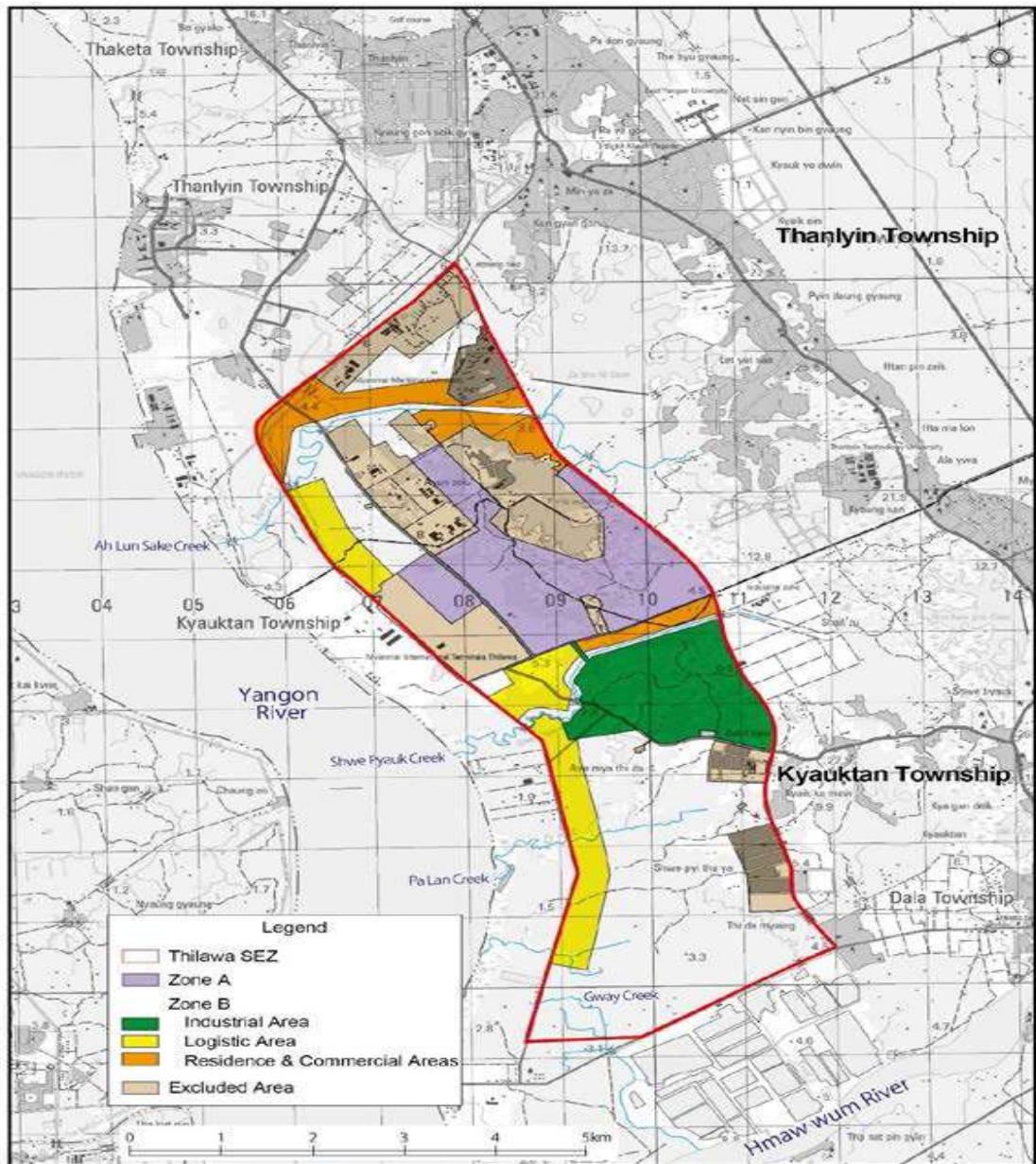
No.	Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
7	Thilawa SEZ's social investment projects make a positive contribution to the livelihoods of people.					
8	Thilawa SEZ makes a greater contribution to the community than other industrial zones in the Yangon Region.					
9	Thilawa SEZ is creating better long-term value for the community and country than other economic zones in Myanmar.					

Section (B): Infrastructure and Services Provision

No.	Statement	Improved	Original	Note
	(A) Infrastructure and Services			
1	Schools			
2	Health facilities			
3	Roads			
4	Bridges			
5	Water Supply			
6	Power Supply			
7	Pagoda/temple/church/mosque			
8	Other (please describe)			

No	Statement	Yes	No	Note
(B) Impacts				
<u>B-1. Social Impacts</u>				
1	Improved infrastructure (e.g., road upgrades, new health or education facilities, new telecommunications infrastructure, etc)			
2	Improved social services (e.g., greater access to health professionals, more education choices for children, etc)			
3	Better health outcomes			
4	Better education outcomes			
5	Increased crime / reduced security			
6	Reduced health outcomes			
7	Reduced education outcomes			
<u>B-2. Economic Impacts</u>				
8	Improved training and skills development opportunities			
9	Increased job opportunities			
10	Increased business opportunities			
11	Higher wages for workers			
12	Increased cost of goods			
<u>B-3. Environmental Impacts</u>				
13	Improved waste management			
14	Higher population			
15	The higher number of outsiders			
16	Increased traffic			
17	Loss of land/resettlement			
18	Dust issues/air pollution			
19	Noise issues			
20	Pollution (e.g., water, soil, etc)			
21	Restricted access (e.g., cut-off from neighboring communities, services, markets, farmlands, etc)			

Figure (3.1) Zone A and Zone B in Thilawa SEZ



Source: Thilawa SEZ Management Committee

Figure (3.2) Yangon Region Map



Figure (3.3) Yangon Region Map

