

Aquaculture Governance Indicators (AGIs) assessment synthesis report

Country:

Myanmar

Species:

Whiteleg shrimp (*L. vannamei*)

Blacktiger shrimp (*P. monodon*)

Giant freshwater prawn (*M. rosenbergii*)

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Country overview

Myanmar aquaculture sector has been in transition, largely because the country was under military rule for decades and its economy had been shuttered from the world markets. Despite this, however, the sector has grown ~9% per year since 2004. In 2012, after a transition to a new civil government and presidency, Myanmar underwent economic integration and expansion into the global market. Shrimp and carp are the two main products produced via aquaculture. For shrimp, the production methods are varied. Farming of *P. monodon* around Rhakine state and parts of the Ayeyarwady delta near Yangon is extensive while semi-intensive farming occurs west of the delta and around New Saung.

P. monodon is the farmed the most within the country with most shrimp exports being this

species. Freshwater prawn (*Macrobrachium Rosenbergii*) production is via polyculture ponds (fish/rice) and *Litopenaeus vannamei* is a somewhat new entrant into the aquaculture landscape (a US company started a hatchery to produce SPF post-larvae in 2017). These latter two species are mainly consumed domestically with some exported abroad, e.g. *L. vannamei* to Japan.

Note: there is currently no Seafood Watch assessment for Myanmar shrimp.

Legislation

There is a general lack of government authority in Myanmar, across all the World Governance Indicators. Although there is specific aquaculture legislation, the content of this legislation is outdated and insufficiently covers the key issue areas, e.g. Aquaculture Law is from 1989 and the Marine Fisheries Law is from 1994. In other cases where the laws are more recent, they are narrowly focused on one issue area, e.g. 2012 Environmental Conservation Law. There is no attention to cumulative impacts and the legislation does not distinguish between different types of producers.

Responsibilities between ministries and departments are unclear, leading to conflicts, and implementation guidance is lacking. Information is not transparent, because it is either non-existent or incomplete, e.g. government registers area and production volumes but no input data is required.

Compliance is very low because of the outdated Land Act. For example, there are many illegal shrimp farms because the legislation does not allow the conversion of land from paddy to aquaculture. Legislation is barely monitored and/or evaluated due to a

lack of sufficient resources by Dept of Fisheries.

Overall, coordination with global and regional levels of governance is insufficient. Despite Myanmar being a signatory on global treaties, there are no signs of actual relevant changes within its legislation. However, signing on is itself a step in the right direction since the country was not a signatory in the past.

Voluntary codes and standards

ASEAN GAP lacks input legitimacy since it was developed by the government without an opportunity provided for deliberation with other stakeholders. On the other hand, the Asia Seafood Improvement Collaborative (ASIC) process is transparent and the shrimp industry is represented as stakeholders.

The ASIC standards in particular covers most of the Seafood Watch issue areas, however, the standards are not considered relevant by most stakeholders in Myanmar because of their complexity and focus on export markets.

There is minimal organization of standards, except for a few ASEAN GAP pilot farms, due to their relatively low activity and because there is no funding to subsidize the cost of compliance.

There is no participation in ASIC (yet) and minor participation in ASEAN GAP and no monitoring or evaluation activities being carried out.

The two relevant standards (ASIC and ASEAN GAP) are generally consistent in content with ASEAN GAP used as a reference for development of the ASIC standard. While there is no coordination between the standards, there are no factors that would

prevent coordination per say. Lastly, neither standards have been benchmarked by international organizations (GSSI and ISEAL).

Collaborative arrangements

There are three main types of collaborative arrangements: i) interactive governance: MYSAP – a program promoting sustainable aquaculture implemented by Myanmar Department of Fisheries (DoF) and Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) along with various partners from civil society and market (e.g. Myanmar Fisheries Federation); ii) non-state self-governance: university/MFF collaboration – partnership between academia and industry to increase capacity in aquaculture; and iii) industry self-governance: US Soybean Export Council and companies/farmers – collaboration aimed at developing feed industry and promoting US soybean use.

Relevant stakeholders seem to be involved, but the decision-making agenda appears to pre-determined. For example, some decision-making process seems to be driven by donor funding, such as the US Soybean Export Council and its initiative to develop the feed industry in Myanmar. While there is a diversity of actors (governments, state, industry) represented in the collaborative arrangements, the decision-making process is not always clear and lacks transparency.

The collaborative arrangements are relevant and cover some of the most important issues. MYSAP project covers a wide array of environmental and social issues whereas the academia and industry collaboration mostly covers issue of disease. None of the arrangements focus on cumulative impacts.

Interviews suggest that there is a lack of reliable data to base processes and policies on. Only MYSAP appears to be transparent in its reporting.

Goals and strategies are established within all of the collaborative arrangements and translated into action plans. MYSAP is the only arrangement that addresses controversial issues such as legislation on land tenure, and mangrove-related farming. All CAs address the overarching issue of a lack of capacity. Learning sessions are organized by MYSAP whereas in the university/MFF arrangement the focus is on mutual learning.

The collaborative arrangements are relatively consistent and cover the main issue areas (disease, feed, habitat, source of stock) in a complementary fashion. Specifically, the MYSAP and university/MFF collaboration is well coordinated and involves overlap in actors and facilities. The USSEC arrangement is not actively coordinated with the other two CAs. Despite activities within the CAs, there does not appear to be any change in legislation from their activities, although they have increased the capacity of the industry overall. Likewise, there is no evidence to indicate any changes in the scope of codes and standards or increased uptake of standards because of the CAs.

Capabilities

The actors selected to assess this dimension are i) Dept of Fisheries (state); ii) Myanmar Fisheries Federation (market); iii) Shrimp Farmer's Association (market); and iv) GIZ (civil society).

Overall, actors are somewhat reflexive, although the Dept of Fisheries (DoF) denies some of the issues raised, e.g. that its

hierarchical organization poses a challenge to reflexivity and prevents staff from raising concerns. Generally, state actors do not consult outside experts, unlike those in market and civil society (the select times they do, they are limited in number and not diverse).

There is lack of resources for M&E, especially for DoF, and not many staff training sessions are organized, leading to a lack of internal capacity building. Combined, these factors significantly limit the extent of agility.

Even though there are individuals who wish to work on new ideas and some actors set up pilot projects, for example, the result of these actions remain limited due to a lack of strong leadership on innovation and resources for research and development activities.

For the state, there is little possibility to reallocate tasks and/or roles, as positions rotate and the DoF has little influence within the ministry. Other actors in civil society (GIZ) are restricted by the space they are given. Positively, there is evidence of multi-level organization: the DoF operates at multiple levels; MFF and Shrimp Association work across multiple levels via its members; GIZ works with local partners across various levels.

Actionable insights

Legislation: Several pieces of legislation that concern aquaculture are outdated and require reform; a general lack of authority and organization of implementation of legislation such as unclear responsibilities hamper effective governance; and compliance is low due to low levels of monitoring and evaluation of legislation caused by insufficient resources.

Voluntary codes & Standards: While ASEAN GAP has informed the other standard in the

country (ASIC), its adoption and development has been without key stakeholder involvement, and thus, it lacks input legitimacy; organization of standards is low because of a lack of resources (money) to subsidize cost of compliance; and monitoring and evaluation of the standards does not exist.

Collaborative arrangements: the decision-making process within CAs is not always clear and lacks transparency, except for MYSAP in its reporting; a more collaborative approach could be made to address 'controversial' issues, e.g. land tenure and mangrove-area farming (currently only MYSAP focuses on this); the CAs have yet to influence any changes in legislation or scope of codes and standards

Capabilities: while reflection is present to a degree among actors, entrenched hierarchies, particularly in DoF, prevent staff from raising concerns and stifles a culture of reflexivity; there is a lack of resources for M&E and not many training sessions are organized, leading to lack of internal capacity building; the capacity to reallocate tasks/roles faces low probability due to rotating positions and little influence by DoF within the Ministry; limited resources restrict communication, which remains predominantly reactive.