Chapter 6

Digital Economy of Myanmar

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1. Introduction

Over the past decade, Myanmar's digital economy has rapidly evolved, driven by technological advancements and increased internet access. However, significant obstacles remain in creating a fully inclusive and secure digital ecosystem. This chapter provides an overview of the status of Myanmar's digital economy and discusses challenges such as the digital divide, privacy issues, cybersecurity threats, and market competition.

Whilst Association of Southeast Asian Nations (ASEAN) countries faced the challenges of the coronavirus disease (COVID-19) pandemic, they successfully adopted digital technologies to overcome these difficulties and implement the goals according to Bandar Seri Begawan Roadmap. Specifically, ASEAN countries aim to enhance public safety and ensure the efficient movement of resources, including cross-border trade, through technological advancements. Achieving these goals requires promoting access to and trusting digital applications and transactions as well as strengthening intellectual property rights protection through coordinated efforts by ASEAN bodies.

The implementation of the road map involves three key stages: Recovery (2021–2022), Acceleration (2022–2024), and Transformation (2025). To successfully implement the ASEAN Digital Economy Strategy, it is essential to address challenges in areas such as (i) digital connectivity, cybersecurity, and digital divide; (ii) interoperability and harmonisation of laws, regulations, and standards; (iii) digital talent innovation and research and development; and (iv) the impact of technology on free and fair market competition.

This chapter is intended to facilitate coordination with the Economic Research Institute for ASEAN and East Asia (ERIA) team and to support ASEAN chairmanships in advancing the ASEAN Digital Community (ADC) by 2045 through ASEAN or East Asian Minister Meetings and Business Summits.

2. Current Digital Status

Over the last decade, Myanmar has had the best opportunities to develop its digital economy. Although the COVID-19 pandemic severely impacted the country, it also accelerated the adoption of digital technologies, pushing many sectors towards digital transformation. The country quickly recognised the benefits of digital adoption across various industries, leading to an accelerated digital transformation process post-pandemic.

As reported in the Digital 2023 Myanmar Report (We Are Social & Meltwater, 2023), by January 2023, Myanmar had a population of 54.38 million, 44% or 23.93 million of whom had access to the internet. Social media usage stood at 27.6%, representing 15 million users, whilst the total number of mobile phone connections was 64.60 million or 118.8% of the population.

As of May 2024, Myanmar continued to face armed clashes between the State Administration Council (SAC) government and ethnic armed organisations. Some of these organisations control border areas, disrupting border trade. The hot season and dwindling water resources have further strained energy supplies, leading to widespread electricity rationing for households and businesses. After nearly 3 years of ongoing conflict, the SAC has struggled to focus on economic growth amidst the civil war.

3. Digital Economy Development Committee

To spearhead the implementation of the digital economy, the government established the Digital Economy Development Committee (DEDC) in June 2017. Initially, the committee was chaired by Vice President Henry Van Thio, with the Union Minister of Industry, Planning and Finance also playing a key leadership role[1]. From then until 3 August 2023, the committee was overseen by Admiral Tin Aung San, Deputy Prime Minister and Union Minister for Transport and Communications. Leadership was subsequently transferred to General Mya Tun Oo, who now heads the Ministry of Transport and Administration (The Irrawaddy, 2023).

The committee is designed to incorporate a broad range of stakeholders. Membership is extensive and includes deputy ministers, permanent secretaries, and directors-general from the ministries of industry, planning, and finance; transport and communications; education; commerce; labour; and immigration and population. Representatives from the Myanmar Investment Commission, the Central Bank of Myanmar; Micro, Small and Medium-sized Enterprises (MSMEs) Development Committee; the private sector; and academia are also involved.

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[1] In 2021, the ministry was separated as the Ministry of Industry and the Ministry of Planning and Finance under the SAC.

DEDC developed three versions of the Digital Economy Roadmap: the first was drafted on 25 August 2017, the second on 30 January 2018, and the third and most recent version on 20 September 2018. The road map draws heavily on international examples, including the European Digital Economy and Society, the United Kingdom's Digital Strategy, Sweden's Digital Strategy, Singapore's Digital Strategy, Thailand's Digital Economy and Community Strategy, and the ASEAN Economic Community Blueprint 2025. The committee has aligned the strategy with the United Nations Sustainable Development Goals, particularly 9 (Build resilient infrastructure, promote inclusive and sustainable industrialisation, and foster innovation) and 12 (Ensure sustainable consumption and production patterns). The strategy adheres to the State Economic Policy, focusing on Policy No. 4 (Prioritising the rapid development of fundamental economic infrastructure such as electricity generation, roads and ports, and establishing a data ID card system, a digital government strategy, and an e-government system.) and Policy No. 11 (Establishing technical systems and procedures to support intellectual property rights that encourage innovation and the development of advanced technology).

The digital economy strategy is a key component of the Myanmar Sustainable Development Plan (MSDP), which was drafted in August 2018 by the government, with the Ministry of Planning and Finance serving as the focal ministry. The MSDP aims to provide an overarching framework for coordination and cooperation across all ministries, states, and regions to collectively steer Myanmar towards a prosperous, peaceful and democratic future.

The strategy supports the establishment of Pillar 2: (Prosperity and Partnership), Goal 3: (Job creation and private sector-led growth), and Strategy 3.7 (Encouraging greater creativity and innovation to contribute to the development of a modern economy).

The mission statement of DEDC is 'Enabling digital transformation, digital government, digital trade and innovation to develop a digital economy across all sectors for inclusive and sustainable socioeconomic development'.

Under this plan, nine sectors have been prioritised: education; healthcare; agriculture, fishery, and livestock; tourism and hospitality; manufacturing and MSMEs; financial services; technology and start-up ecosystem; digital trade; and transport and logistics.

4. Goals and Action Plans

This section outlines the six focus areas identified for development under the digital economy strategy: digital transformation and digital trade, digital government, digital connectivity, digital skills and inclusion, digital security, and digital innovation.

The following table, derived from DEDC Action Plans, outlines both the planned initiatives and the progress made in implementing the digital economy.

Table 6.1. Planned Targets and Progress for Implementing the Digital Economy Strategy

	2020	2025
Digital Transformation and Digital Trade		
Digital transformation across business sectors	10%	30%
Effective utilisation of digital technology by MSMEs	20%	50%
Digital financial service transactions	15%	30%
Improvement in WEF Network Readiness Index ranking	130	120
Digital Government		
Improvement in UN E-Government Development ranking	155	145
Digital Connectivity		
Unique mobile subscription	50%	55%
Mobile network coverage as a percentage of the population	93%	98%
Improvement in ITU ICT Development Index ranking	130	120
Digital Skills and Inclusion		
Internet users as a percentage of the population	45%	50%
Qualified tech-related graduates per year	5,000	10,000
Number of people employed in the digital economy	100,000	300,000
Digital Security		
Improvement in ITU Global Cybersecurity Index ranking	97	90
Digital Innovation		
Foreign direct investment in the digital industry	8 billion	12 billion
Improvement in Global Innovation Index ranking	125	120

ITU = International Telecommunication Union, MSMEs = micro, small, and medium-sized enterprises; UN = United Nations; WEF = World Economic Forum.

Source: Ministry of Planning, Finance and Industry (2019), *"Myanmar Digital Economy Roadmap",* Slide no. 7-12, Nay Pyi Taw, https://myanmar.gov.mm/documents/20143/9096339/2019-02-07+DEDC+RoadMap+ for+Websites.pdf/ [Accessed on 01 October, 2024]

5. Focus Areas and Recommended Action Plans

This section outlines the difficulties and recommended action plans for implementing Myanmar's digital economy.

5.1. Digital Transformation and Digital Trade

To advance digital transformation and digital trade, the action plan is divided into short-term and long-term strategies. In the short term, the focus is on establishing robust policies to promote digital trade and e-commerce, as well as ensuring the interoperability of digital payment systems. The Ministry of Commerce recently classified e-commerce as an essential service under Section 4(c) of the Essential Supplies and Services Law, as per Notification No. 50/2023, and issued an e-commerce registration order via Notification No. 51/2023 on 21 July 2023. This order requires individuals, companies, and business organisations engaged in e-commerce to obtain a registration certificate from the Department of Trade. Online registration for e-commerce is successfully launched by 2nd October 2023 and accessible at https://www.ecomreg.gov.mm/.

This process will be integrated into other relevant ministries, such as the taxation department. Although payment solutions were hindered by the political climate during 2021–2022, they have since returned to a more normal state. The Ministry of Industry continues to support MSMEs and is now focused on enabling them to access international markets through digital channels. The ministry has organised local talent professionals and entrepreneurs into a group of consultants, mentors, and coaches to assist MSMEs. They work together to conduct local surveys and mini-research projects aimed at promoting MSMEs on digital platforms. The ministry is collaborating with non-governmental organisations to implement a digital platform for MSMEs to facilitate personal and professional development. As part of the action plan, it is necessary to provide tax incentives for MSMEs to adopt digital technologies.
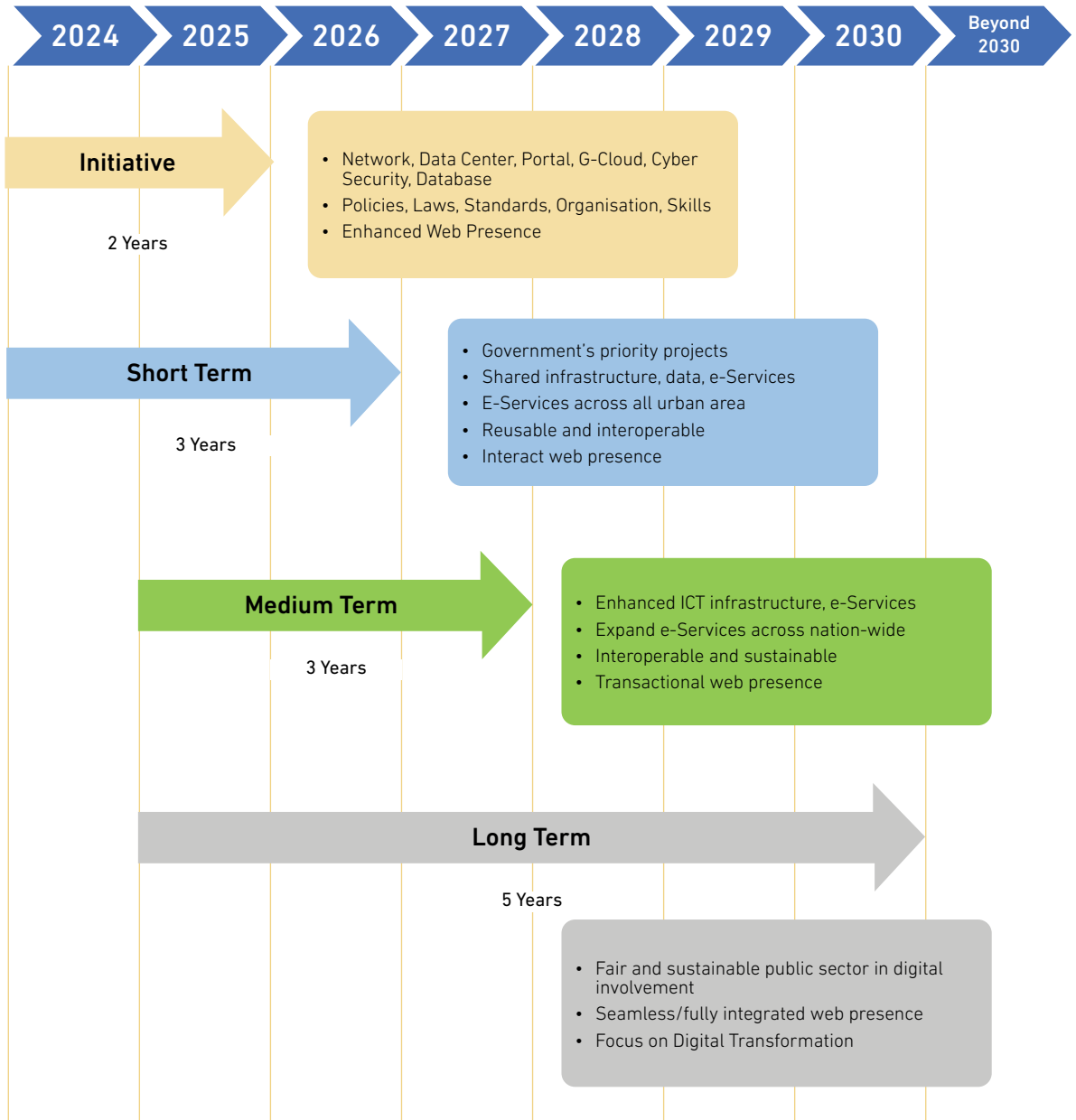
In the long term, the focus will be on promoting the digital transformation of MSMEs and large enterprises across all sectors, as well as promoting a cashless society and financial inclusion through digital technology. The Central Bank of Myanmar is working on Myanmar Quick Response (MMQR) standardisation as part of the National Payment System Strategy (2022–2025), expected to launch a beta version by January 2025 and a final version after April 2025. The long-term goal is for the government to establish the necessary legislation and policies to support digital economy transformation.

5.2. Digital Government

The government is drafting steps for the e-Government Master Plan (2030) with a citizen-centric approach. The action plans up to 2030 are based on the existing plan, which has been analysed, amended, and updated in response to current internal and external conditions. The new draft aligns with the ASEAN Digital Master Plan 2025, which aims to transition from the concept of e-government to digital government.

The concept of the digital ID was introduced in 2013 and was part of the e-Government Master Plan (2016–2020). In 2017, the Ministry of Labor, Immigration and Population launched pilot projects in selected regions to replace traditional ID cards with digital versions. The new digital ID system will collect individuals' personal information, including photos, addresses, employment details, blood type, and fingerprints. Prior to this, the SAC mandated the registration of all mobile subscriber identity module (SIM) cards. Both initiatives are part of the digital government plan, but they have not been well communicated to the public, sometimes creating fear amongst citizens.

Figure 6.1. Digital Government Roadmap 2030

| 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | Beyond 2030 |

Initiative

2 Years

- Network, Data Center, Portal, G-Cloud, Cyber Security, Database
- Policies, Laws, Standards, Organisation, Skills
- Enhanced Web Presence

Short Term

3 Years

- Government's priority projects
- Shared infrastructure, data, e-Services
- E-Services across all urban area
- Reusable and interoperable
- Interact web presence

Medium Term

3 Years

- Enhanced ICT infrastructure, e-Services
- Expand e-Services across nation-wide
- Interoperable and sustainable
- Transactional web presence

Long Term

5 Years

- Fair and sustainable public sector in digital involvement
- Seamless/fully integrated web presence
- Focus on Digital Transformation

ICT = information and communication technology.

Source: Myanmar e-Government Master Plan 2030.

Figure 6.2. Digital Government Readiness Assessment
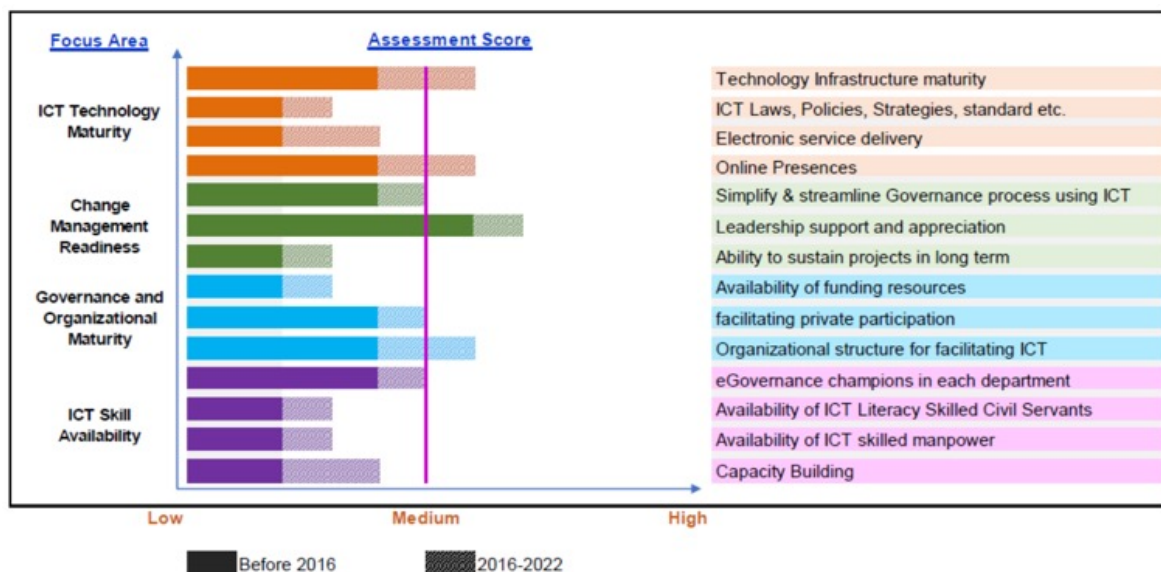
ICT= information and communication technology.

Source: Myanmar e-Government Master Plan 2030.

In the short term, the government plans to improve digital citizen engagement by creating citizen engagement apps and platforms. Establishing one-stop service centres is crucial, as is developing a common and shared database of citizens whilst ensuring data privacy standards. E-government services should facilitate two-way communication between government agencies and citizens and be extended to rural areas. In the long term, it is important to raise awareness of digital government services amongst businesses and the public. The digital divide between rural and urban areas must also be addressed, and the government must make significant efforts to bridge this gap. According to the e-Government Master Plan (2030), all government agencies' web presence should achieve 'transactional presence' as defined by the Five-Stage Model for e-Government.

5.3. Digital Connectivity

Addressing the digital divide is essential when discussing Myanmar's digital transformation. Despite increasing internet penetration, the country still lags behind other Southeast Asian nations in terms of connectivity. According to the International Telecommunication Union, as of 2021, only around 39% of the population had access to the internet. The digital divide is primarily due to infrastructural limitations, high internet service costs, and low digital literacy rates in rural and remote areas. Although mobile and internet penetration remarkably increased in 2015–2022, usage was temporarily stalled due to political instability in 2021 but recovered after a year.

The government has already drafted a national broadband strategy aimed at expanding affordable broadband services across the country. This strategy supports the implementation of a fibre optic network in government agencies and universities, a metro fibre optic network in cities, and a nationwide fibre optic network. As part of the action plan to implement the national broadband strategy, spectrum utilisation will be promoted to improve access to wireless broadband networks and IoT networks. This will not be limited to urban areas but will also extend to villages and remote areas to improve digital connectivity. In the long term, it is important to establish high-speed internet access at affordable prices for education, healthcare, and MSMEs. The improvement of digital connectivity is also addressed in the newly revised e-Government Master Plan (2030).

5.4. Digital Skills and Inclusion

Digital literacy remains an issue in Myanmar, but collaboration between the government, educational institutions, and civil society organisations can play a vital role in providing training and awareness programmes. Due to COVID-19, mobile and internet penetration increased significantly, prompting people to adopt technologies to sustain their businesses. This trend also applies to education and other sectors, particularly in the growth of digital currency, mobile payment solutions, and decentralised finance services, as well as government services.

It is encouraging to see people helping each other with digital knowledge; peer education seems to be very effective. Over time, such training could lead to community-led education platforms that drive and enable digital economy services. Connectivity declined in 2021–2022 due to internet censorship and social media restrictions but recovered after 2023, returning to a new normal.

Whilst the digital divide was once a big issue, the millennial generation and beyond are increasingly familiar with digital devices. What were once considered luxury items are now viewed as necessities, meaning that the digital divide may soon become less significant. However, the issue of digital dividends still needs to be addressed.

Political instability has led many citizens to migrate to neighbouring countries, particularly Thailand and other ASEAN countries, creating a digital skills gap, brain drain, and talent retention issues. Whilst neighbouring countries seek skilled foreign workers, they often receive unskilled migrants. To address this issue, host countries are encouraged to run capacity and skills development programmes for Myanmar citizens, a strategy that could be applied in similar contexts.

5.5. Digital Security

Cybersecurity is a pressing concern for Myanmar's digital economy. As reliance on digital technologies grows, the country becomes more vulnerable to cyber threats such as hacking, data breaches, and malware attacks. Myanmar lacks a comprehensive legal framework to effectively address cybersecurity challenges and has a shortage of skilled cybersecurity professionals and limited public–private collaboration.

To strengthen cybersecurity, Myanmar needs to develop robust legal frameworks and establish dedicated institutions responsible for cybersecurity governance and incident response. Collaboration between the public and private sectors is essential to enhance cybersecurity awareness and capacity-building programmes. Investing in education and training will help cultivate a skilled workforce capable of addressing evolving cyber threats. Critical infrastructure sectors, such as energy, telecommunications, and finance, are prime targets for cyber-attacks. It is crucial to implement robust security measures and frameworks specific to these sectors to protect against potential disruptions and breaches. Regular assessments, audits, and penetration testing can help identify vulnerabilities and strengthen the security posture of critical infrastructure.

Myanmar faces various cyber threats, including hacking, malware attacks, phishing, and ransomware. These threats can target government institutions, critical infrastructure, businesses, and individuals. Recent incidents have highlighted the need for robust cybersecurity measures to mitigate these risks.

As part of the short-term action plan, it is necessary to develop measurable cybersecurity awareness programmes for government agencies, businesses and the public. The government should establish a national cybersecurity operation centre and enhance the capacity and authority of Myanmar Computer Emergency Response Team (MMCERT). The government is setting up national frameworks for technology risk management, cyber incident response, and cybercrime prevention.

In the long term, the government should provide a competency model for cybersecurity workforce development and enhance international cybersecurity collaboration, supported by training programmes. Myanmar faces a shortage of skilled cybersecurity professionals capable of proactively identifying and responding to cyber threats. This lack of a trained workforce hampers the country's ability to establish strong cybersecurity practices and incident response capabilities. Enhancing cybersecurity education and training programmes will help bridge the skills gap.

Collaboration between the government, private sector, and civil society organisations is essential for effective cybersecurity. However, public–private partnerships need to be strengthened, and platforms for information sharing, threat intelligence, and coordinated response efforts must be created. Encouraging collaboration and knowledge exchange can enhance the collective ability to address cyber threats.

Current privacy issues in Myanmar stem from the absence of comprehensive data protection laws and regulations, a lack of enforcement mechanisms, and limited public awareness of privacy rights. These challenges leave individuals vulnerable to privacy breaches and the unauthorised use of personal information, making immediate action necessary.

5.6. Digital Innovation

Market competition is another critical aspect of Myanmar's digital economy that requires attention. Whilst e-commerce has grown significantly, there are concerns about fair competition and monopolistic practices. The lack of clear regulations and competition policies allows dominant players to exert undue influence, stifling innovation and limiting opportunities for smaller businesses.

To promote healthy competition, Myanmar must develop and enforce robust competition laws that prevent anti-competitive practices and ensure a level playing field. By creating an environment conducive to innovation and entrepreneurship, the country can support the growth of start-ups and smaller businesses, thereby driving economic development and diversification. For the past 3 to 4 decades, Myanmar has grappled with reliability and integrity issues regarding data, which are crucial for making accurate and precise decisions. Businesses are often compelled to align with the government's immediate interests, resulting in a market that favours those closely connected to the government rather than those who are genuinely competitive.

Although infrastructure development is progressing at a steady pace, much remains to be done in rural areas. The government has a vital role in creating an enabling environment that bridges the digital divide. Implementing policies and regulations that promote competition, innovation, and affordability in the telecommunication sector will help expand internet access. The introduction of data protection and privacy laws will build trust and confidence in the digital ecosystem, encouraging individuals to embrace digital technologies. The laws and regulations concerning digital and technologies, last amended in the early 2000s, are based on outdated concepts and require updates to reflect the latest technological advancements. This is particularly true in discussions about the digital economy, where many new laws are expected. Facebook serves as the primary e-commerce platform. However, due to political instability, social media platforms, including Facebook, have faced stringent censorship. The government should reconsider this censorship policy to promote a thriving digital economy.

6. Recommendations

Table 6.2. Summary of Issues and Recommendation

No.	Policy Issues	Regulations
1	Digital transformation and digital Trade	• Promote MSMEs • Implement national payment system
2	Digital government	• Enhance citizen participation • Promote public–private-partnerships
3	Digital connectivity	• Implement national broadband strategy and communication system across the country
4	Digital skills and inclusion	• Promote digital education and literacy
5	Digital security	• Educate citizens on cybersecurity and implement secure infrastructures
6	Digital innovation	• Narrow down the digital divide • Promote and guide digital unicorns

MSMEs = micro, small, and medium-sized enterprises.

Source: Ministry of Planning, Finance and Industry (2019), *"Myanmar Digital Economy Roadmap",* Slide no. 13-20, Nay Pyi Taw, https://myanmar.gov.mm/documents/20143/9096339/2019-02-07+DEDC+RoadMap+ for+Websites.pdf/ [Accessed on 01 October, 2024]

7. Conclusion

Since 2017, the government has been advancing its Digital Economy Roadmap, led by the Digital Economy Development Committee. This road map aligns with the United Nation's Sustainable Development Goals 9 and 12, which focus on resilient infrastructure and promote inclusive, sustainable industrialisation, innovation, and sustainable consumption and production patterns.

The recommendations above are not new. They have been previously discussed and drafted by various ministries, with additional insights incorporated to adapt to current needs. Myanmar's policymakers are heavily focused on national security and sensitive to social media and freedom of speech. There is a noticeable deficiency in digital literacy. Their conservative approach to development focuses excessively on technological efficiency in human tasks.

Policymakers must embrace business process re-engineering to harness technology's benefits fully and align people, processes, and technology in digital transformation initiatives. They should reassess policies that hinder digital economic growth and consider supportive alternatives. Although Myanmar is recovering from COVID-19, ongoing political instability poses significant challenges to economic development.

Myanmar's digital economy offers immense potential for growth and development. Addressing key challenges such as bridging the digital divide, protecting privacy, enhancing cybersecurity, and promoting fair market competition is vital. Through committed collaboration amongst stakeholders and the implementation of effective regulations, Myanmar can capitalise on the digital economy to significantly benefit its citizens and the nation.

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