

INFORMATION ECOSYSTEMS IN TRANSITION: A CASE STUDY FROM MYANMAR

HOW TO INFORM, EMPOWER, AND IMPACT COMMUNITIES

Mon State, Myanmar Pilot Study
PART ONE: RESEARCH FINDINGS



Internews

Center for Innovation & Learning

ABOUT THE AUTHORS

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COVER PHOTO

Man reads journal and listens to radio
Kyaik Hto - Moke Ka Mawt Village.

ABOUT THE RESEARCH TEAM

Established in 1995, Myanmar Survey Research (MSR) is a market and social research company based in Yangon, Myanmar. MSR has produced over 650 research reports in the fields of social, market, and environmental research over the past 16 years for UN agencies, INGOs, and business organizations.

ABOUT INTERNEWS IN MYANMAR

Internews is an international nonprofit organization whose mission is to empower local media worldwide to give people the news and information they need, the ability to connect and the means to make their voices heard. Internews provides communities with the resources to produce local news and information with integrity and independence.

With global expertise and reach, Internews trains both media professionals and citizen journalists, introduces innovative media solutions, increases coverage of vital issues and helps establish policies needed for open access to information.

The Internews Burma project opened its doors in January 2001 and has worked for the last 14 years to strengthen the capacity of Burmese media outlets both inside the country and within the exiled and international Burmese media community. Over the years Internews has provided comprehensive support for Burmese and ethnic language publications, websites, bloggers, broadcasters, editors, managers and publishers. This support includes training and mentoring in reporting on environment, human rights, elections, gender, policy issues, media management, media law, small grants and technical support for publishing and production. As part of this program, Internews operated the first in-residence journalism school for Burmese and ethnic reporters in Chiang Mai, Thailand. The school trained hundreds of journalists and media professionals, and equipped a new generation of Burmese and ethnic media professionals with the skills to work full-time. Internews trained and provided technical and financial support to more than 15 different local organizations, both along the border and inside the country. These organizations have gone on to play leading roles in disseminating quality news and information about Burma to the world and to the Burmese population alike. Internews’ work in Myanmar continues today, and has expanded beyond support for traditional media to include the country’s first-ever hackathon in 2014, which brought together 76 of the country’s most talented young developers, designers and entrepreneurs.

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EXECUTIVE SUMMARY

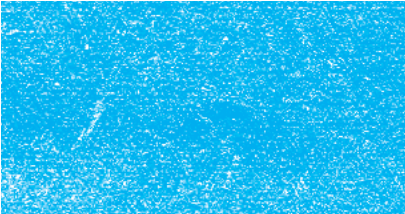
Myanmar’s recent relaxing of political, economic, and social restrictions has provided a unique opportunity to conduct research in Myanmar’s ethnic states. This report on Mon State’s information ecosystem is the first in a planned series of studies into the demographic, news media, and information dynamics that characterize Mon State as well as Myanmar’s six other ethnic states—Chin, Kachin, Kayah (Karenni), Kayin (Karen), Rakhine (Arakan), and Shan.

An information ecosystem is not a static entity; it is by nature constantly evolving and changing. Nor is it a discrete form; it can be defined at many levels, from global to national to community to interest-based groupings within communities. Any examination of an information ecosystem goes beyond traditional audience research on media access and consumption; it adds considerations of information needs and information creation and distribution as fluid systems that adapt and regenerate according to the broader developmental challenges and needs of a given community.

The report draws from quantitative and qualitative research commissioned by the Internews Center for Innovation & Learning (the Center) from December 16, 2012 to January 5, 2013 in Mon State, Myanmar. The research sampled respondents from across Mon State, and combines quantitative data from a 500 household survey covering urban, rural, non-conflict, and former conflict areas, with qualitative data from 12 focus group discussions and 24 key informant interviews in both non-conflict and former conflict areas.

The research focuses on three themes. Firstly, it identifies and maps the information environment in Mon State in terms of technology and media use across urban, rural, non-conflict, and former conflict geographic areas. Secondly, the flow of news and information is examined to see how individuals receive information and then make decisions about sharing it with others. Thirdly, the report examines the dynamics underlying the trust and influence of news and information among individuals in Mon State.

EXECUTIVE SUMMARY



DESPITE THE HIGH COST OF MOBILE ACCESS IN MYANMAR AT THE TIME OF THIS RESEARCH, NEARLY HALF OF ALL URBAN MON STATE RESPONDENTS HAVE A MOBILE PHONE

There can be few places left in the world where almost half the population does not know what the internet is. The Mon State pilot research has particular value in attempting to describe the information ecosystem of a target community situated at an unprecedented tipping point in the history of a closed society. Key structural factors (governance, technology, economy) are changing suddenly, simultaneously exerting profound change in the ways in which citizens access and use information. Whilst experience drawn from other political transitions may be indicative of future trends in Myanmar, there has rarely been an opportunity to track and chart such sudden and extreme change, and establish a baseline before social media and other forces disrupt and transform the information environment.

Some of the key findings of this report are consistent with the current image of Myanmar opening its doors and airwaves to a brave new influx of information. More frequently there emerges a mixed picture as to access, and some thought-provoking findings around trust and flow of information.

The research indicates that, despite the high cost of mobile access in Myanmar at the time of this research, nearly half of all urban Mon State respondents have a mobile phone. This penetration would have been unthinkable just a few years ago. Nevertheless, widespread lack of electricity continues to significantly hamper full mobile phone usage. Furthermore, only 2% of mobile phone users in Mon State use their phones to access the Internet. In the urban areas of Mon State, TV has replaced radio as the main source of news and information. However in rural locations, qualitative interviews indicated that TV is mainly used as an entertainment medium, not to access news and information. However, a large proportion of Mon State residents do not watch TV at all. Nearly half of the total sample said they had never watched TV (46%).

In rural and former conflict areas, radio is the most common source. Once information enters a community however, its flow is overwhelmingly face-to-face sharing through word of mouth. Moreover, this information flow largely takes place in the home (78% of respondents), and to immediate friends and family. Indeed, only 28% of respondents saw themselves as a source of news for the greater community, indicating that most information exchange tends to stay close to home.

In this study, news and information sources that are considered trusted—with trustworthiness defined in terms of a source’s accuracy and reliability—tended strongly to be the sources that were best-known and familiar to respondents. Few people indeed trust what they are not familiar with. As a result, friends and family ranked highest for trust, but perhaps surprisingly, so did state-owned media, such as MRTV (jointly-operated with the private Forever Group Ltd.) and Nay Pyi Daw Myanmar Radio National Service (*Nay Pyi Daw Myanma Ah-Tha*n). Overall, however, people in Mon State remain generally skeptical of the news they hear, a habit held-over from a time when information sources were few and rumors abundant. Most people regularly validate the news and information they hear against other sources, never fully trusting any source completely.

Findings around the reach and impact of formerly exiled (pro-democracy) media indicated little awareness of exiled print media. However, there is a solid recognition of shortwave international Burmese language services, and strikingly high recognition for Democratic Voice of Burma TV.

Serious consideration needs to be given to the more nuanced, and perhaps less rosy outlook brought to the surface by the ecosystem research responses on trust. Not only did state-owned radio show up as significantly better recognized and trusted than the international stations, but qualitative research revealed mixed or decreased trust in foreign news sources. This is primarily due to strong perceptions among some respondents of biased reporting on the conflict between Buddhists and Muslims in Rakhine State by foreign news media.

It is true to say that media content and media and information channels will always be primary factors of supply in any information ecosystem. However, it is necessary to guard against drawing conclusions about media access and “openness” based on a “production + distribution = better informed citizenry” model that cannot adequately account for the quality of the information available, or flow, trust and uptake factors in complex environments.

In Myanmar today there exists the risk that under the guise of increased media access, the formerly “information dark” ecosystems which prevailed across much of the country under military rule may be seamlessly replaced with “information lite” ecosystems in which unsophisticated media audiences consume primarily entertainment and “managed” news content. This sleight of hand would replicate the information ecosystems of the “disciplined democracies” of Singapore, Malaysia and China - to which Myanmar aspires - by (at best) doing nothing to foster the development of an informed citizenry and (at worst) perpetuating state influence over the architecture of public information and discourse.

For those who wish to see an increase in both the quantity and quality of content feeding into *local information ecosystems* as a way of enhancing development or democracy/governance goals, it will be important to temper runaway excitement about Myanmar’s “opening” with an understanding of some of the constraints and idiosyncrasies in the country’s *national and local information ecosystems*. It is the contention of this paper that a better understanding of the *information ecosystem* of any given community or population will be helpful in developing holistic strategies that harness dynamics in that ecosystem to improve the chances of information actually reaching its destination.

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ABOUT INFORMATION ECOSYSTEMS

At the heart of the Internews Center for Innovation & Learning’s work is the vision that *healthy information ecosystems are a root solution to furthering human progress*. The term *Information Ecosystems* refers to a loose, dynamic configuration of different sources, flows, producers, consumers, and sharers of information interacting within a defined community or space. For anyone interested in improving information access, flow and uptake in target communities, an understanding of Information Ecosystems are increasingly recognized as being key to the design of appropriate and effective interventions.

Borrowed from environmental studies, the term “information ecosystem” is used to describe how local communities exist and evolve within particular information and communication systems. Within these systems, different types of news and information may be received from outside then passed on to others—through word of mouth, key community members, phone, the Internet, and the like. An examination of an information ecosystem looks at the flow, trust, use and impact of news and information.

An information ecosystem is not a static entity; it is by nature constantly evolving and changing. Nor is it a discrete form; it can be defined at many levels, from global to interest-based groupings within communities. Any examination of an information ecosystem looks at information needs, creation and distribution as fluid systems that adapt and regenerate according to the challenges of a given situation.

More formally, the Internews Center for Innovation & Learning (hereafter referred to as the Center) currently defines an information ecosystem as follows:

Information ecosystems are complex adaptive systems that include information infrastructure, tools, media, producers, consumers, and sharers. They are complexes of dynamic social relationships; information moves and transforms in flows. Through information ecosystems, we can see information as a master resource, like energy, the lack of which makes everything else more difficult.

ABOUT INFORMATION ECOSYSTEMS

EIGHT CRITICAL DIMENSIONS OF INFORMATION ECOSYSTEMS

1. Information needs: Are they known to information producers? Are the needs of all groups being served? Populations' information needs are diverse and changing.

2. Information landscape: What are the physical and institutional infrastructures that support information production and flow? What are the characteristics of the information providers? What are the intermediary organizations: media, government, civic? Are they robustly equipped to verify, filter, sort, and disseminate information?

3. Production and movement: Are a variety of types of information available (e.g. government services, community news)? Who are the producers of information and the owners of the means of production and dissemination? What is the role of word of mouth, social media, bulletin boards? (How) are rapid changes in internet and mobile media impacting the flow of information? What types of content are available and to whom? How does our perspective on these dynamics shift if information flows are framed as storytelling?

4. Dynamic of access: What is the environment in which information flows (e.g. political, cultural, time, cost, and other factors)? How easy is it for residents to access, find, use, and share different types of information? What are the barriers to participation? What about the broader structures that influence access: governance, legal, political, economic, and infrastructural factors affecting access?

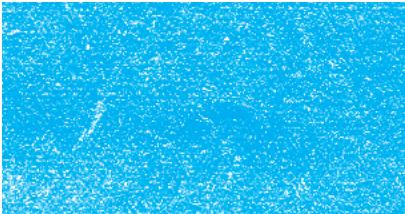
5. Use: What does the audience / users do with the information? Does information facilitate civic engagement?

6. Impact of information: How has information enabled or constrained individual and community opportunity, health, and economic development? How does the community organize around different types of information? (How) has information informed community planning and action?

7. Social trust: How do networks of trust influence the flow and use of information? How is trust built around information? Where are the disruptions in trust tied to information (or its lack)? What are the challenges in building trust around information flows?

8. Influencers: Who are the people, organizations, and institutions that influence how information flows? Who builds trust and how? How do points of influence shift over time, especially during disruption?¹⁴

14 INTERNEWS CENTER FOR INNOVATION & LEARNING, "INFORMATION ECOSYSTEMS LITERATURE REVIEW" (2014).



THROUGH INFORMATION ECOSYSTEMS, WE CAN SEE INFORMATION AS A MASTER RESOURCE, LIKE ENERGY, THE LACK OF WHICH MAKES EVERYTHING MORE DIFFICULT.

In late 2012, the Center started to experiment with new methods to understand the information dynamics of communities, particularly those in restrictive environments where the usual quantitative and qualitative research approaches (surveying, depth interviews, focus groups etc.) have inherent limitations (logistics, security, accuracy). The potential of ethnographic and design research to reveal the intricacies of human experiences and relationships within highly complex systems in support of the creation of appropriate, innovation solutions clearly appeared as a potentially valuable approach for this study. Working alongside Reboot, a social enterprise supporting improved global governance and development, the Center implemented a groundbreaking study investigating the information ecosystems in Pakistan's Tribal Areas.

Despite the challenges of implementing this research, using and adapting techniques from the field of design and ethnographic research proved an excellent approach to understanding from the ground-level the complexities of information access and use in areas of the Tribal Areas of Pakistan. This approach proved capable not only of capturing the expected outputs of conventional research approaches, but also revealed subtle but significant nuances of the information environment, notably those related to trust, influence and adaptive behaviors using new technologies.¹⁵

Based on the work conducted in Pakistan, the Center turned to focus on the unique opportunity afforded by the rapid removal of political, economic, and social restrictions in Myanmar, to conduct research on the flow of news and information in this previously tightly controlled country, particularly the ethnic states.

15 INTERNEWS CENTER FOR INNOVATION & LEARNING, "TRUST, INFLUENCE, AND CONNECTIVITY – UNDERSTANDING INFORMATION ECOSYSTEMS IN PAKISTAN'S TRIBAL AREAS. A DESIGN RESEARCH APPROACH" (2013).

ABOUT THE RESEARCH

Media access and consumption surveys have been conducted infrequently in Myanmar over the last decades. In one survey conducted clandestinely in 1999 for internal use by one of the international broadcasters, respondents listed their top information needs as religious and health information, with news featuring low on the list of preferences.¹⁶ This finding seemed counter-intuitive to western pro-democracy expectations that all the citizens of Burma were hungry primarily for political news, and led researchers to warn that much of the information they gathered was probably unreliable as respondents would have been reluctant to speak openly about their information needs and consumption habits. In fact much of the research done since then, and right up to today, indicates that religious and health information does in fact regularly rank highly in needs and listening habits of many citizens of Myanmar, frequently higher than political news. This story cautions

would-be researchers to guard against assumptions about information needs, especially in situations where research is being used to inform planning for development or democracy and governance interventions.

Surveys by InterMedia and Gallup for the Broadcasting Board of Governors (BBG) have been conducted more regularly in the last 5 years, concerned largely with assessing the reach and listenership of Voice of America (VOA) and Radio Free Asia (RFA) shortwave radio and TV services. For many years these services, with the BBC World Service and the Democratic Voice of Burma, were assumed to be a primary source of independent news and information for Burmese citizens, especially those in the conflict-affected ethnic states. In recent years the BBG surveys showed an increase in penetration of satellite TV, latterly FM radio, and apparently robust audiences for all the international services. In 2012 it noted many of the key media consumption trends present in the Internews research in Mon State.

However, no surveys to date can claim to present either comprehensive or granular data that allows for deep-dive analysis or comparative explorations of the different ways in which different population groups across Myanmar access and exchange information. Little to no work has yet been done on looking at what factors contribute to differentiated information flows in various parts of the country, and therefore little is understood about how best to ensure that people access information that could be useful to them in their lives. Up until very recently, it has been impossible to reach many of those areas where citizen access to information and media consumption has long been a mystery – notably the conflict areas. Some of these are still inaccessible today, and even in the medium term future are likely to retain many of the idiosyncratic dynamics described above for information ecosystems associated with prolonged conflict, politicization, militarization, ethnic identity issues, underdevelopment, fear and mistrust of government.

An important part of the Center’s exploration into understanding information ecosystems is developing the tools and capacities to capture these dynamics in a rigorous, inclusive way. As a pilot study, the research in Mon State was primarily intended to provide a baseline for the evolution of media and information systems in the next months and years. However, another key objective was to support the iterative process of designing appropriate tools and methods to provide a broad view of the information and communication environment alongside a level of granularity that speaks to the experience of individuals and reveals the complex nuances of trust, influence and information flows.

Internews research in Mon State was carried out primarily to trial a methodology capable of reflecting an information ecosystem rather than just patterns of media dissemination and consumption. More

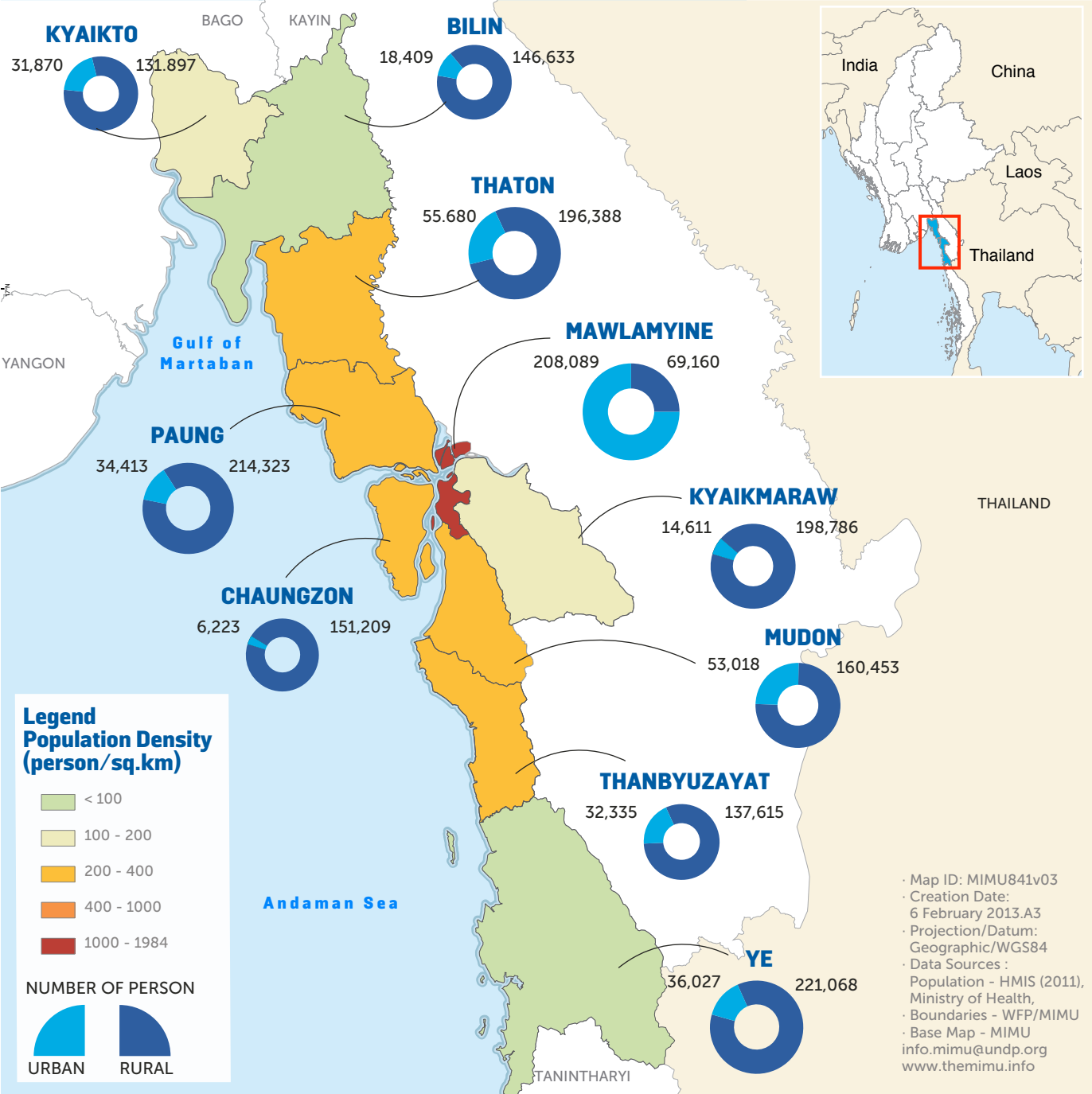
specifically, the pilot aimed to capture an ecosystem at a particular point in time, poised at the brink of profound change at the local and national level. Mon State is, after all, a local information ecosystem within a national one, both of them dynamic. The nature of each and the convergent/divergent dynamics between them are fascinating in and of themselves, especially when their current and future manifestations are considered in the light of the last half-century of Burma’s history. However the real utility and value of the ecosystem research perspective will be demonstrated over time, when repeat surveys and improvements to methodology and analysis will prove increasingly capable of identifying and understanding the relationships between the multiplicity of factors that constitute an information ecosystem.

The report draws from quantitative and qualitative research commissioned by the Internews Center for Innovation & Learning (the Center) from December 16, 2012 to January 5, 2013 in Mon State, Myanmar. The research sampled respondents from across Mon State, and combines quantitative data from a 500 household survey covering urban, rural, non-conflict, and former conflict areas, with qualitative data from 12 focus group discussions, 24 key informant interviews and 12 photography-centered observations in both non-conflict and former conflict areas. In-country research was carried out through the services of field contractor Myanmar Survey Research (MSR).¹⁷

16 THE SURVEY FINDINGS CONTAIN PROPRIETARY INFORMATION AND ARE NOT PUBLICLY AVAILABLE.

17 FOR DETAILS OF THE RESEARCH AND SAMPLE DESIGN, SEE APPENDIX TWO – RESEARCH DESIGN.

ABOUT THE RESEARCH - MAP¹⁸



18 MIMU MYANMAR INFORMATION MANAGEMENT UNIT, <http://www.themimu.info/>.

RELEVANCE OF MON STATE STUDY TO MYANMAR AS A WHOLE

Present day Mon State was created in 1974. Mon State is an administrative division of Myanmar. With a land area of approximately 12,200km², it is located between Kayin State on the east and by the Andaman Sea on the West and shares a short border with Thailand to the Southeast. The state capital is Mawlamyaing.¹⁹

In the absence of official data, the population of Mon State was estimated to be 3,193,000 in 2012.²⁰ The majority of this population are ethnic Mon who also account for 2 percent of the population of Myanmar.²¹ In Mon State there is a large number of ethnic Bamar, as well as members of the Kayin and Pa-O ethnic groups and a small, dwindling Anglo-Burmese community. Many of these groups are isolated and do not understand or speak Burmese. There is a Thai Community in Kyaikkami. The majority of people are Buddhist.²² Mon has three primary dialects, all mutually intelligible and area dependent – Central, Ye and Bago.

Since independence in 1948, Myanmar has foremost faced a challenge of national unity. In Mon State, a Mon nationalist movement arose shortly after the end of World War II, calling for an independent sovereign

state of Monland. In 1948, a Mon separatist movement began under the banner of the Mon Peoples Front (MPF) and fighting broke out, just as other similar ethnic rebellions were developing across the country.

By 1958, MPF separatists took up an offer of amnesty and accepted a ceasefire agreement. However, a new faction, the New Mon State Party (NMSP) took leadership of the armed resistance soon after. The NMSP and its armed wing, the Mon National Liberation Army (MNLA), continued armed struggle in Mon State against the Myanmar military government for the next 40 years, from their base in the Ye river valley, near the Thai-Myanmar border.

Following the fall of NMSP headquarters to the Burmese Army in 1990, ceasefire negotiations between the government and the NMSP took place from 1993 until 1995. The NMSP signed a ceasefire with the military regime in 1995, which resulted in initial economic assistance from the central government, but no political negotiations.

The ceasefire continued until 2010 when it broke down over refusal by the NMSP (along with other ethnic minority armed groups across Myanmar) to surrender control of its armed forces to the central government and transform into a Border Guard Force under Burmese Army control. A new ceasefire agreement was reached in February 2012, however, with no fighting occurring between the NMSP and the Burmese Army during the interim.

19 "MON STATE," WIKIPEDIA, http://en.wikipedia.org/wiki/Mon_state (August 12, 2014).
20 "MYANMAR," CITY POPULATION, <http://www.citypopulation.de/Myanmar.html> (August 12, 2014).
21 "BRIEFING: MYANMAR'S ETHNIC PROBLEMS," IRIN HUMANITARIAN NEWS AND ANALYSIS, <http://www.irinnews.org/report/95195/briefing-myanmar-s-ethnic-problems> (August 12, 2014).
22 "MON PEOPLE," WIKIPEDIA, http://en.wikipedia.org/wiki/Mon_people (August 12, 2014).

ABOUT THE RESEARCH



Villagers watching movies in video theater - Kyaikhto, Mokekamaw Village

FROM BURMA TO MYANMAR: INFORMATION ECOSYSTEMS AT WORK

Until recently, few might have predicted the political, social and economic developments now taking place in Myanmar. For the first time in 50 years, Myanmar’s military has eased its total control of the state, allowing a quasi-civilian government and the participation of opposition political parties in parliament. Political prisoners have been released, ceasefire agreements signed with rebel ethnic groups, and media censorship has significantly eased.

The recent quasi-democratization of the country has created rapidly intensifying interest from a multitude of actors (local and international) in engaging and

communicating with Myanmar citizens. The reasons range from the drive to open commercial markets to the promotion of governance and social and economic development. This holds especially true for the remotest, least developed and chronically conflict-affected ethnic minority areas that will increasingly become the focus of interest for national and state government, the international development community, corporate investors and resource hungry opportunists of all stripes. Yet in a country where control and manipulation of information was for so many years a central and fundamentally twisted feature of the relationship between state and citizen, and between citizens themselves, no straightforward assumptions can (or should) be made about the ways in which people will access and utilize information in the rapidly morphing information ecosystems of the future.

INFORMATION ECOSYSTEMS UNDER MILITARY RULE

CONTROL AND PROPAGANDA

Under a succession of brutal and secretive military regimes, Burma was rendered one of the most isolated countries in the world. With western sanctions in place, limited access for tourists and draconian restrictions on the activities of civil society and foreign NGOs, there were only narrow windows into the daily lives of Burmese and ethnic citizens. These were provided by Burmese and international pro-democracy and human rights activists and journalists operating covertly or cross-border to gather and disseminate to the world information on the state of the country.

Amongst the litany of human rights abuses reported during these dark decades, there ran an important theme that is generally consistent across all despotic regimes, that of restrictions on access to and exchange of information amongst citizens. This was evidenced most clearly in the (now infamous) media regulatory environment that ensured state monopoly of broadcast media and entrenched tight control of print media through licensing and legal edicts hostile to the principles and practice of independent journalism. Burma languished for decades at the bottom of media freedom indexes.²³

There exists a wealth of documentation on the suppression of media freedom and access to information in the country. All citizens, but especially those in the minority ethnic states, lived in fear of arbitrary

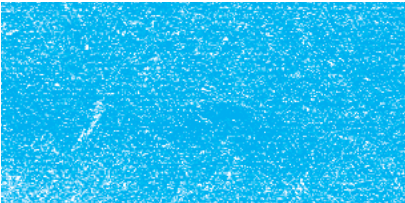
arrest, torture, imprisonment or extra judicial killings for “crimes” of meeting, expressing opinions and imparting or exchanging news and information in any way. Newspaper editors played cat-and-mouse games with their censors on the Press Scrutiny Board, finding subtle and convoluted ways to signal resistance or insert sensitive topics into their articles, to the extent that generations of Burmese talk about their skill in “reading between the lines.”

In parallel to strategies for information control, the regime in Burma devoted significant effort to disseminating propaganda not only through its broadcast channels and state newspapers but also on billboards in public places, at state events and other citizen gatherings across the country. The signature messages of the regime promoted the military as the protectors of the people and guardians of a “united Burma,” and warned against the toxic influences of foreigners and other agents of destabilization intent on tearing the nation apart. The overwrought and surreal style of the propaganda became something of a joke amongst educated pro-democracy Burmese and westerners (as North Korea’s propaganda is today). However, the message of the state and the army as a protector of the people against insidious foreign forces is one that has nationalistic resonance with Burmese going back to colonial times. While it is to be expected that this kind of propaganda would have had little traction in conflict-affected ethnic areas, it cannot be assumed that it was wholly ineffective, or even unwelcome to many Burmese who spent their whole lives without access to alternative information.

For the purposes of understanding the significance of information ecosystems in Myanmar, it is important to note that draconian laws governing media access and press freedoms, and the heavyweight propaganda environment, were only a part of the country’s overall information ecosystem. Under notorious Military Intelligence Chief Khin Nyunt, the reach

23 ACCORDING TO FREEDOM HOUSE, IN 2013 MYANMAR CONTINUED TO BE CLASSIFIED AS “NOT FREE.” SINCE 2005, THE PRESS FREEDOM SCORE CONSISTENTLY RATED IN THE MID TO HIGH 90’S, FALLING SLIGHTLY IN 2012 TO 85 AND 72 IN 2013. “FREEDOM OF THE PRESS,” FREEDOM HOUSE. <http://www.freedomhouse.org/report-types/freedom-press#.UzRDsK1dV4> (August 12, 2014).

ABOUT THE RESEARCH



AS ACTIVISTS AND JOURNALISTS STROVE TO SOURCE INFORMATION AND EXPOSE IT TO INTERNATIONAL ATTENTION, AN ENORMOUS EFFORT WAS EXPENDED ON MAINTAINING A FLOW OF INFORMATION INTO THE COUNTRY

of the state security apparatus was pervasive. His units infiltrated almost every organization in the country, and maintained networks of spies in almost every neighborhood. These networks relied in turn on local informants who routinely passed along snippets of information under coercion or to gain favors or protection. Christina Fink’s aptly named “Living Silence: Life under Military Rule in Burma” describes a society infected with fear and mistrust that divided even close knit communities, family and friends. Information was both a precious and dangerous commodity, closely linked to notions of risk and power, traded through formal and informal channels invested with a range of trust and attitude factors by different parts of the population. “Living Silence” describes an unusually highly charged and multi-faceted information ecosystem.

ALTERNATIVE INFORMATION SUPPLY AS A PRO DEMOCRACY TACTIC

At the same time that activists and journalists strove to source information from inside the secretive state and expose it to the radar of international attention, an enormous amount of effort was expended on trying to maintain a flow of news and information into the country. This came from the US, UK, Scandinavia, Thailand, India, Bangladesh, Malaysia and a multitude of actors including the exiled wing of Aung San Suu Kyi’s National League for Democracy (NLD) party, exiled ethnic leadership, international donor governments, civil society organizations, human rights and media development organizations.

All these groups weighed in with the intention not only of moderating the impact of propaganda with independent information, but also to encourage and support pro-democracy elements inside the country.

The tactic of introducing supplies of alternative information (or even outright counter-propaganda) to the information ecosystems of closed or contested territories is as old as the strategy of propaganda itself. From 1940 onwards, the BBC World Service in Burmese was a key source of news and information on shortwave radio for citizens of Burma, a role that peaked in political significance during the student uprisings of 1988. During this time citizens in far-flung parts of Burma were made aware that radical dissatisfaction was being openly expressed in the capital. In the years that followed, the BBC Burmese service was joined on shortwave by the Voice of America (VOA) Burmese service and the official “voice of the pro-democracy movement” the Democratic Voice (DVB) of Burma out of Oslo. In Thailand a plethora of small activist publications sprang up, some of them products of the information offices of the ethnic armies, many of them intermittently published and of poor quality, but all aiming (or claiming) to reach people inside Burma. The logistics of doing this were daunting, as the publications had to be hand smuggled across the border, where carriers and readers alike could receive a mandatory seven year sentence for possession of this kind of literature. There was no paying market for these publications so they relied on international grant funding and training supplied by Internews,

the Open Society Institute, the National Endowment for Democracy and others. Through the late 90s and through the 2000s, thousands of small newspapers in Burmese and ethnic languages were produced and moved through covert networks across the border.

This supply effort was considered an important aspect of the pro-democracy struggle, based largely on pro-democratic assumptions about demand, access and reach inside the country. It presumed that many people in Burma distrusted state media and hungered for independent news and information about political developments (or lack of them) in the country. It was next to impossible to conduct any systematic audience surveys in the country, so evidence of the extent to which citizens accessed both shortwave radio signals and publications was anecdotal and patchy, gleaned from the distribution networks themselves, and from refugees and exiles arriving at the border. The success of the supply effort had to be estimated primarily as a quantitative function of production+distribution. Broadcast footprints plus numbers of publications coming off the presses were summed up to estimate the extent to which people became better informed about what was going on in their own country. What was (and still is) less well understood is the extent to which these efforts actually reached their intended audiences and whether the information was useful to those audiences (i.e. did it meet their information needs and help them to make decisions relevant to their lives?).

NEW PERSPECTIVES: SUPPLY VS CONSUMPTION

As time went on and the sophistication of the nascent Burma media community in exile grew, questions arose around factors that might influence the spread of the information contained in the media disseminated, including literacy levels, ability of ethnic people to read Burmese language, the likelihood that publications would be passed from hand to hand, and the expectation that those who read the publications

would share their content by word of mouth. In absence of the ability to conduct conventional audience research, the effort to provide people in Burma with independent information started to gear itself around more nuanced notions about the information ecosystems that lay on the other side of the border. It was recognized, for instance, that in each ethnic state, and even in different parts of each ethnic state, the information arriving in communities through radio and newspapers would reach and spread amongst citizens in uneven ways that would change over time, depending on external factors (i.e. balance of power between the military and the ethnic armies, security, transport, access to electricity and radio sets, and even the personalities of key community figures or military commanders who might facilitate or obstruct information flows).

The relevance of this background to those seeking to understand and work with the concept of information ecosystems is the way in which environments such as Burma (closed states, restricted environments, media dark areas, conflict zones etc.) challenge us to think about information dynamics beyond typical assumptions about (or measurements of) media supply and media consumption. It further challenges us to consider the fact that the media is frequently not a primary source of information for the majority of citizens in these kinds of complex closed environments, and what the implications of that may be for reaching people with information that can improve their lives. In low tech and low literacy environments, the primary mode of information exchange (flow) is likely to be word of mouth from family, friends, community leaders and others, a mechanism intrinsically related to circles of trust and subject to a multitude of influences and perceptions shaped by other community dynamics.

One example of this is the extent to which the Burmese army itself became a significant source of information for the ethnic communities that it oppressed, not only

ABOUT THE RESEARCH



7 Day News Journal - Kyaik Hto - Zay Yar Mon Ward

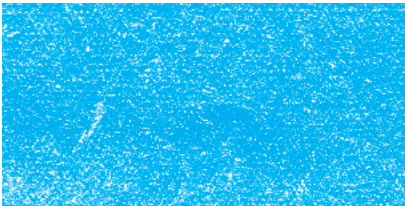
through formal edicts, but counter intuitively, also through formal and less formal relationships that developed between soldiers and citizens in areas where they lived in close contact for decades. The ethnic armies (often highly mobile) were also key sources of information for citizens in conflict zones. Meanwhile state radio was the most accessible media source to all parties – a ubiquitous kind of information “wallpaper” common to all. Such a situation raises intriguing questions about citizen attitudes towards choice, agency and trust in ecosystems where information has traditionally been owned and transmitted primarily by those vested with some sort of authority.

ECOSYSTEMS IN POLITICAL TRANSITION

MYANMAR MEDIA LANDSCAPE 2012-2014

Myanmar’s media landscape has changed dramatically in the last two years since the 2010 election, the release of Aung San Suu Kyi from house arrest and the commencement of the current government-managed reform process. A few years ago, simply displaying a picture of the opposition politician in a Burmese newspaper or on the streets of Yangon would risk arrest and imprisonment. Foreign news sources such as the BBC and Radio Free Asia (RFA), and Burmese exile media including the Democratic Voice of Burma (DVB), The Irrawaddy, and Mizzima News, were outright banned. Today, such restrictions on media access no longer exist. Importantly, pre-publication censorship of all media has been abolished. In June 2011, the Myanmar government began easing media control by allowing non-political newspapers to publish without first submitting all articles to the Press Scrutiny and Registration Division (PSRD), the Orwellian-sounding government censorship bureau. By August 2012, the government had announced the end to prior censorship for all publications, a practice that began in 1964 during the early days of General Ne Win’s military regime. Publishers of exiled media, including Mizzima, DVB, and Irrawaddy, have now officially entered Myanmar and set up bureaus in Yangon. In April, for the first time since the 1960s, the government began allowing private daily newspapers to print.

Media choices in Myanmar are growing quickly and offer the prospect of greater choice and range of viewpoints, but remain primarily defined by the mainstream media that vary in accessibility and quality. Newspapers have been proliferating in the cities while new television programs, driven



A FEW YEARS AGO, SIMPLY DISPLAYING A PICTURE OF THE OPPOSITION POLITICIAN IN A BURMESE NEWSPAPER WOULD RISK ARREST AND IMPRISONMENT

particularly by satellite TV services, have expanded the range of content and programming available within the country. These range from rich political discussion via DVB-Burmese to a variety of entertainment, including popular Burmese and Korean soap operas and even Myanmar Idol, a Burmese version of the popular music competition.

However, despite Myanmar’s expanding media choices, most options remain limited to urban centers and entrenched in old interests. According to a report from Reporters Without Borders, “There are more than 300 newspapers in Burma, of which around 100 are based in and around Rangoon and only about 30 cover the news.”²⁴ Moreover, according to the NLD elder statesman Win Tin, “Only 25 percent of the newspapers are independent, that is to say, entirely financed by the private sector. The other 75 percent are linked to military leaders.”²⁵

Similarly, in TV and radio, the stations with the most extensive reach and popularity remain in the government’s hands—state-run Nay Pyi Daw Myanmar Radio National Service (Nay Pyi Daw Myanma Ah-Tha) has served as a government mouthpiece and had little in the way of entertainment programs, while popular MRTV is a joint venture between the government and the private firm Forever Group Ltd. Still, even these are

evolving. In Mon State, Nay Pyi Daw Myanmar Radio broadcasts Mon language programs, which have proved popular with many respondents, while MRTV does not have the appearance of being government-owned, running everything from music and food programming to game shows.

For Internet, three providers exist in Myanmar: Red Link Communications, Sky Net MPS, and Yatanarpon Teleport. All three work under the regulation of state-owned Myanmar Posts and Telecommunications (MPT), which controls all aspects of Myanmar’s communications sector, including landlines, street phone kiosks, and mobile phones. At the current time, connecting to the Internet outside of Internet cafes is beyond the financial reach of most of Myanmar’s citizens and the country still has one of the lowest degrees of internet penetration in the world: 1-2%.

INCREASED ACCESS DOES NOT NECESSARILY MEAN BETTER INFORMED

It is intuitive to think that an overall increase in the supply of media inputs channeled to local and national information ecosystems will result in all citizens becoming “better informed.” Similar assumptions lie behind Communication for Development approaches that inject public service messages into target communities. There is, however, a body of evidence that suggests these assumptions are not necessarily well founded: that both media content and C4D messages can easily miss their mark, and that unintended consequences can ensue. For those who

24 REPORTERS WITHOUT BORDERS, “BURMESE MEDIA SPRING” (DECEMBER 2012).

25 IBID.

ABOUT THE RESEARCH

wish to see an increase in both the quantity and quality of content feeding into local information ecosystems as a way of enhancing development or democracy and governance goals, it will be important to temper runaway excitement about Myanmar’s “opening” with an understanding of some of the constraints and idiosyncrasies in the country’s national and local information ecosystems. It is the contention of this paper that a better understanding of the information ecosystem of any given community is crucial in order to improve the chances of information actually reaching its destination.

In a recent report for Internews entitled “The Business of Media in Myanmar,” leading media management consultant Michelle Foster²⁶ warns of the emergence of significant pressures on the media environment, primarily legal and economic. The report serves to highlight one of the most important supply equations that lies at the heart of any information ecosystem: that is the relationship between information access (the channels of delivery) and the quality (relevance, utility) of the information available on those channels.

“The government, which has always monopolized the broadcast sector, now is exerting equal dominance in the print field. Although it claims to be converting into a public service media organization, it continues to hold unfair advantages that directly and indirectly affect the ability of independent media to succeed. It has converted its journals to daily newspapers, charges only 50 kyats for them wholesale (compared to 140-170 kyats for the independent dailies) and uses its military transportation infrastructure to ensure nationwide daily distribution of more than 200,000 copies. The various media laws, well-detailed elsewhere, are being set up to operate under the “social responsibility model”... that places more emphasis

on the press’s responsibility to society than on the freedom of the press. Moreover, the ways the laws are being crafted gives significant power to the state to disrupt the media environment through business and licensing practices rather than through the brute force of censorship. Thus its controls can be quite powerful but less visible.”

HOW INFORMATION PERMEATES: TRUST, NEED, FLOW AND EXCHANGE

Methodologies for analyzing local information ecosystems in historically marginalized areas like Mon State introduce a layer of complexity to the overarching supply equation by revealing localized “demand side” factors such as patterns of access, flow and exchange as functions of trust and need. What this means is that even where surveys show expanding audiences in Myanmar accessing new radio, TV and internet channels, questions need to be asked about the quality of news and information available, and how readily it is able to permeate effectively into complex local information ecosystems across large swathes of the country.

There exists the risk that under the guise of increased media access, the formerly “information dark” ecosystems which prevailed across much of the country under military rule may be seamlessly replaced with “information lite” ecosystems in which unsophisticated media audiences consume primarily entertainment and “managed” news content. This sleight of hand would replicate the information ecosystems of the “disciplined democracies” of Singapore, Malaysia and China - to which Myanmar aspires - by (at best) doing nothing to foster the development of an informed citizenry and (at worst) perpetuating state influence over the architecture of public information and discourse.

26 THIS REPORT CAN BE ACCESSED HERE:
https://internews.org/sites/default/files/resources/Internews_Burma_Business_Report2014.pdf



Mobile phone shop Mawlamyaing - Pan Bae Dan Ward.

FINDINGS

Whilst Myanmar’s ethnic states are enormously diverse, they do share key features in terms of underdevelopment, remoteness, and their history of conflict and political repression. Of all the conflict-affected ethnic states in Myanmar at the time of the research, Mon State offered the most stable and accessible environment for research in former conflict and non-conflict areas. Research in Mon State might bring to light findings that could be expected to broadly correlate to the contexts of other ethnic states.

The Mon State pilot research has particular value in attempting to describe the information ecosystem of a target community situated at an unprecedented tipping point in the history of a closed society. Future iterations of this research in Mon State will make an important contribution to ongoing analysis of the role played by local and national information ecosystems in the political, economic and social development of Myanmar.

Mon State therefore provides an excellent opportunity to case study an environment that remained information dark in many respects during these periods of turmoil. It also contains significant areas that can broadly be divided into those that were relatively unscathed by conflict – termed “non-conflict areas” for the purpose of this analysis -- and “former conflict” areas. Comparison of these two types of areas allows for another important element in the understanding of how information flows are exposed to different kinds of internal and external disruptions.

However, beyond the Myanmar/Mon State context, the research methodology piloted here has the potential to supply important insights into how information ecosystems help determine a community’s ability to thrive by metabolizing change. This is a key determinant of community resilience. Such insights in turn can further an understanding of the role that healthy information ecosystems may play in the ability of communities to adapt to future change including shocks such as natural disasters, conflict, or major political events.



An Internet
cafe in
Mawlamyine
town.

USE OF MEDIA AND TECHNOLOGY: KEY FINDINGS

- 67% of respondents in Mon State have a TV and DVD/VCD player in their home.
- TV use is highest in urban areas. In rural or former conflict areas, access to TV stations without a satellite connection is either challenging or not possible.
- Radio use has declined in Mon State overall as access to TV and electricity has improved.
- 77% of the sample did not have access to grid-connected electricity.
- 21% of respondents own a mobile phone. 54% of all urban respondents have a mobile phone in their household, while 47% own one themselves.
- Only 2% of mobile phone users use their phones to access the Internet.
- In former conflict areas, radio is the main preferred technology source for news and information.
- 90% or more of radio listeners have heard of the BBC, VOA, and RFA radio stations, but only 60% have listened to programs on them.
- 100% of radio listeners have heard of Nay Pyi Daw Myanmar Radio National Service, Myanmar’s state-run national radio service. 98% have listened to its programs.
- Two other domestic radio stations are highly popular, Padauk Myay and Shwe FM. Each are known by close to 90% of radio listeners and listened to by over 80%.
- Weekly journals and newspapers are typically only available in towns, and rarely in villages.
- 98% of respondents have never used the Internet. Over 70% either do not know what the Internet is or do not know how to use it.

INFORMATION FLOWS: KEY FINDINGS

- The most common sources of news and information are radio, friends and family, and TV.
- TV is the most important source in urban areas (used by 62% of urban respondents), while radio is the most important source in rural areas (used by 62% of rural respondents).
- In the former conflict areas where access to news and information is most limited, trusted interpersonal sources are the most used.
- Currently, just 1% of respondents use the Internet to get news and information. Qualitative interviews indicated that university students use the Internet more than any other demographic.
- Information is most often shared by word of mouth (88% of respondents), while just 5% of respondents share news over the phone. Just 1% share by email or SMS.
- The most frequently shared types of information are disaster news or weather forecasts (shared by 79% of respondents), health information (67%), religious information (57%), and news about ethnic conflict (54%).
- Less than one-third of respondents saw themselves as a disseminator of news and information to other members of the community. Most news is passed on to friends and family.
- Only 2% of the sample—business owners, professionals, military, and students—strongly viewed themselves as a source of information for others.
- Over 26% of respondents in former conflict areas do not share news and information at all. However, qualitative interviews revealed an active network of information exchange before the ceasefire to protect villagers from the location of landmines or potential battle zones.
- Despite the prominence of monks in recent political events in Myanmar, such as the 2007 “Saffron Revolution,” respondents in Mon State did not consider monks to be a source of political news or information, and only sought them out for religious information.

FINDINGS

UNDERSTANDING TRUST AND INFLUENCE: KEY FINDINGS

- The sources of information people in Mon State trust the most are friends and family, Nay Pyi Daw Myanmar Radio National Service, MRTV, and Shwe FM.
- Several factors underlie decisions about trust. Respondents had a high degree of trust in news from a familiar source, news presented with video or photographs, news spread by word of mouth, and news shared by elders and local authorities.
- The newspapers, radio stations, and TV stations that are trusted by the most people in Mon State are all government-owned. The most trusted media sources in Mon State are also the ones that have the greatest reach and coverage. These stations are Nay Pyi Daw Myanmar National Radio Service (trusted by 94% of users), MRTV (91%), and the newspapers Kyaymon (76%) and Myanmar Ahlin (73%).
- Trust in foreign vs. domestic new sources is changing. 46% of respondents said they trust information from news sources inside Myanmar more than three years ago. In general, 81% of all respondents said they trust information from sources inside Myanmar more than foreign sources.
- Trust in government news sources appears to be increasing due to reforms that have enabled government media to be more open. Another primary reason, however, is the belief among many respondents that foreign reporting of the July 2012 conflict between Buddhists and Muslims in Rakhine State was biased and discriminatory towards Buddhists. These respondents noted that reporting by government media was more fair, and as a result, they have begun to trust foreign media much less than before.
- Despite this, respondents repeatedly expressed that they did not trust any news source completely. Instead, most respondents felt the need to always validate information against other sources. A common theme was that triangulation was essential prior to fully trusting any information or passing such information on to others.

INTERPRETING THE KEY FINDINGS

For those readers interested in detailed data analysis, additional research findings for each section are provided and illustrated in the companion second half of this report which is entitled Part Two – Additional Data Analysis.

- Use of Media and Technology
- Electricity Availability
- Mobile Phones
- Internet
- Television
- Radio
- Print Media
- Information Flows

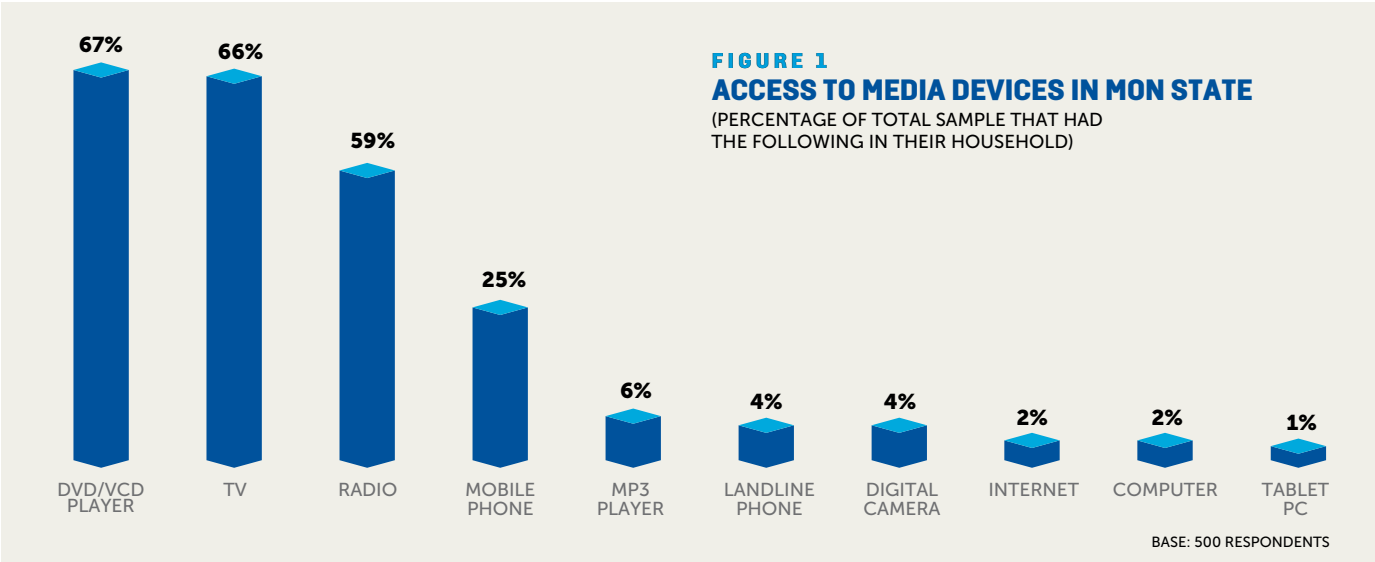


USE OF MEDIA AND TECHNOLOGY



A villager pays to use a phone in a home shop - Mawlamyine , YOGO Village.

USE OF MEDIA AND TECHNOLOGY



This part of the report focuses on interpreting the significance of the findings in Mon State within the framework of the national information ecosystem, and highlighting potential future scenarios for information access and flow in Mon State. Of course the dynamic nature of multiple factors inherent in both ecosystems makes it impossible to predict such scenarios with a high degree of certainty, but in identifying potential confluences of key factors, the exercise provides a baseline for tracking them over time.

Looking at Mon State within the broader context of the national information ecosystem, there are a number of factors to consider that should moderate expectations of rapid information access via electronic (radio and TV) or digital and social media across the country. The most significant of those is, without question, access to electricity.

ELECTRICITY AVAILABILITY LIMITS USE OF TECHNOLOGY

In 2011, 74% of Myanmar’s population lacked access to grid-connected electricity.¹⁴ While average electrification rates are highest in urban centers like Yangon (67%) and Mandalay (31%), in rural areas where 70% of Myanmar’s population lives, rates average a mere 16%.¹⁵

“AS ELECTRICITY SUPPLY BECOMES REGULAR, PEOPLE MAINLY WATCH TV. PEOPLE IN PLACES WITHOUT ELECTRICITY LISTEN TO THE RADIO.”

URBAN RESPONDENT, ZAY YAR MON WARD, KYAIK HTO TOWNSHIP

14 WORLD ECONOMIC FORUM, “NEW ENERGY ARCHITECTURE: MYANMAR” (2013).
15 ASIAN DEVELOPMENT BANK, “MYANMAR ENERGY SECTOR INITIAL ASSESSMENT” (2012).

In Mon State, 77% of respondents did not have access to the electricity grid. Close to three-quarters reported intermittent access to electricity by generator (72%), while almost one-quarter reported access to electricity in their communities by solar power (22%). Until access to electricity improves, this will remain a key constraint. Even if new technologies such as low-cost mobile phones and SIM cards extend into rural areas, many will lack the ability to regularly charge their devices. Planned investments in Myanmar are projected to result in a growth in electricity output of less than 5% per year. Additionally, as some assessments argue, “even if electricity output doubled every five years (a 15% annual rate, similar to Vietnam’s), it would take five years just to meet today’s needs. In that time, demand would have grown by 12% a year.”¹⁶

16 HARVARD KENNEDY SCHOOL, ASH CENTRE FOR DEMOCRATIC GOVERNANCE AND INNOVATION, “ELECTRICITY IN MYANMAR: THE MISSING PREREQUISITE FOR DEVELOPMENT” (MAY 2012).

MOBILE – SIGNIFICANT EXPANSION DESPITE COST

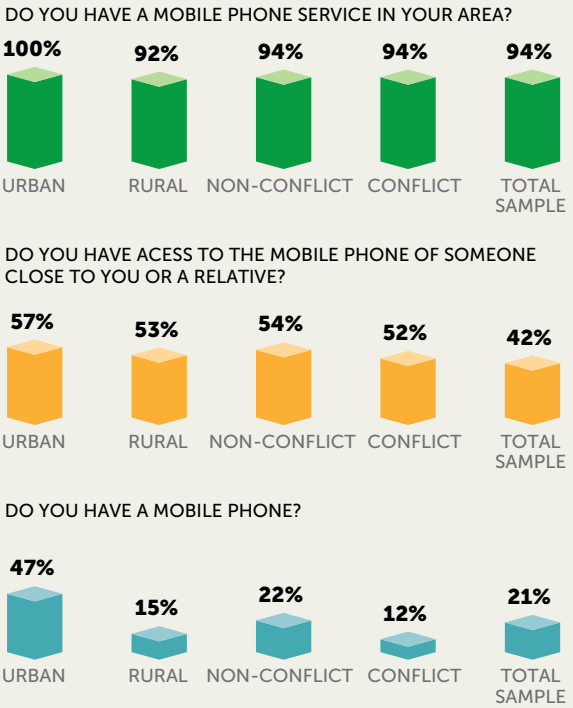
In the two years since Myanmar’s recent political and economic reforms began in 2011, mobile phone access and use has changed rapidly. In 2011, only 3% of Myanmar’s population had a mobile phone.¹⁷ Recent news reports placed the 2012 figure at 9%—higher, but still a way off the Myanmar government’s ambitious goal of 75-80% mobile penetration by 2016. Significant decreases in mobile phone costs, however, hold great potential to expand domestic use, generate increased economic activity, and change the way Burmese access news and information and communicate.

The Mon State study mirrors the national picture, in that penetration is highest in urban areas, lower in rural areas in general and lowest in former conflict areas. 54% of all urban respondents in Mon State have a mobile phone in their household, while 47% own one themselves. This huge change from just a few years

17 THE WORLD BANK, WORLD DEVELOPMENT INDICATORS (WASHINGTON, D.C.: THE WORLD BANK, 2011).

USE OF MEDIA AND TECHNOLOGY

FIGURE 2
PERCENTAGE OF MON STATE RESPONDENTS WHO OWN A MOBILE PHONE



Many observers see in Myanmar the promise of countries such as Kenya, where mobile phone use first leap-frogged rapidly over landline infrastructure and then made possible inexpensive internet access, resulting in one of the most vibrant and innovative landscapes for mobile and social media use in the world. However, the possibility of a dramatic increase in mobile phone ownership or access in Myanmar does not give a complete picture of potential information access or flow in the country. Most respondents in the Mon State study currently use their phones almost exclusively for making phone calls. SMS usage is low and only 2% of mobile phone users use their phones to access the Internet.

ago when mobile phone ownership even in Yangon was confined to a tiny elite, is due to a significant drop in the price not only of mobile phones but also SIM cards. Five years ago a mobile phone cost over \$300, and until very recently SIM cards not only cost \$150 but expired after a short period of time.

Despite the fact that the cost of mobile access in Myanmar at the time of this research was still high relative to income, in Mon State the research revealed that nearly half of all urban Mon State respondents have a mobile phone. 77% of respondents who did not use a mobile phone said the reason was because they could not afford to buy one. This suggests the potential for near universal future use when costs fall and mobile coverage is extended across the country. Telecoms license-winner Telenor plans to build a mobile network in Myanmar with nationwide coverage within five years. The rapid uptake of mobile phones in Myanmar in the near future holds both positive and disruptive potential, decreasing information asymmetries and increasing connectivity, but also enabling increased capability for mobilization and protest should current reforms begin to regress.

The lowest mobile penetration rates were in rural or former conflict areas. As shown in Figure 2, although only 21% of the total sample personally owned a mobile phone, at least half of respondents in each geographic location had access to a mobile phone through a close friend or relative. Furthermore, nearly all respondents had access to a mobile phone service in their community. This access often takes the form of individuals or small businesses that rent the use of a personal mobile phone on a pay-per-minute basis. Some rural communities may share one or two mobile phones between an entire village. Even this is expensive, yet ownership is significant – indicating the importance that citizens place on mobile phones, and indicative of potential uptake as prices reduce. Access in former conflict areas appeared to vary by village. One respondent mentioned that her village had around 20 mobile phones, so villagers no longer had

to wait to use the phone of just one person, as was the case a few years ago. Another respondent mentioned that despite poor connectivity and low signal strength in their village, people had already purchased phones with the hope that connectivity would improve soon.

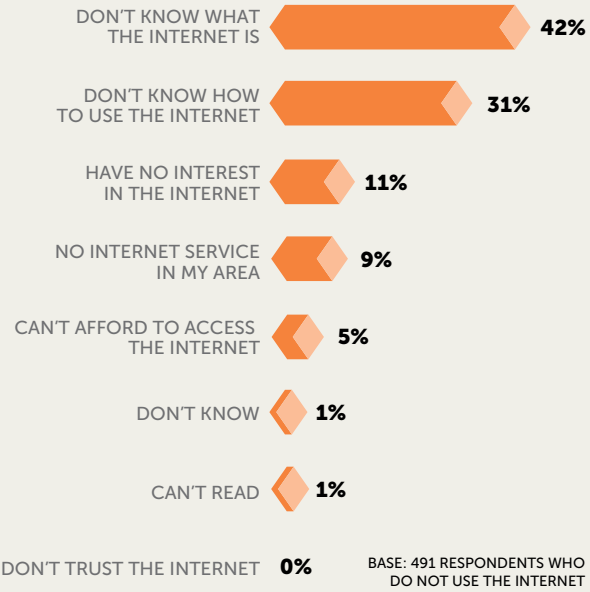
INTERNET AWARENESS LOW - HALF THE POPULATION OF MON STATE DOESN'T KNOW WHAT THE INTERNET IS

Internet use remains strikingly low in Mon State. Just 2% of the entire sample—nine out of 500 respondents—had ever used the Internet. The low rate of Internet use in Mon State is comparable to that of Myanmar as a whole. According to World Bank data, just 1% of Myanmar’s population used the Internet in 2012.¹⁸

There can be few places in the world where almost half the population does not know what the internet is. This baseline can be expected to change dramatically in the next few years. However, in the short term, lack of knowledge or familiarity with the Internet remains a high barrier to use in Mon State (Figure 3). Of the 98% of Mon State respondents who had never used the Internet, the most frequent reason for not using the Internet was because respondents did not know what the Internet was. This was highest among rural respondents (46%). The most frequent response among urban respondents was a lack of knowledge of how to use the Internet (47%).

18 THE WORLD BANK, WORLD DEVELOPMENT INDICATORS (WASHINGTON, D.C.: THE WORLD BANK, 2011).

FIGURE 3
WHAT IS THE MAIN REASON YOU DO NOT USE THE INTERNET?



" I HAVE NEVER USED THE INTERNET. I HAVE HEARD ABOUT THE INTERNET ON THE RADIO AND IN JOURNALS, AND FROM OTHER PEOPLE TOO. I HAVE HEARD THAT INFORMATION ABOUT OUR COUNTRY CAN BE SHARED ALL OVER THE WORLD WHEN IT IS SHARED ON THE INTERNET."

RURAL RESPONDENT, MOKEKAMAW VILLAGE, KYAIK HTO TOWNSHIP

USE OF MEDIA AND TECHNOLOGY

SMS AND INTERNET PENETRATION – COMPLICATED BY ILLITERACY AND LACK OF WRITTEN LANGUAGE

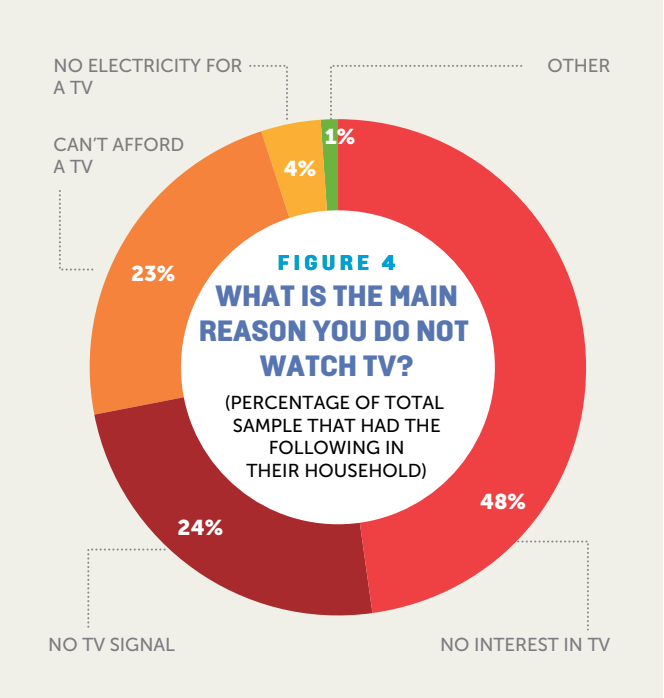
The potential of SMS and internet access on mobile phone in Myanmar is already somewhat complicated by the existence of more than one font for Burmese language. It will continue to be limited in Mon State and other ethnic states, at least in the short to medium term, by the extent to which the country’s close to 50% ethnic population are unable to speak or read Burmese language, and the absence to date of fonts for Mon language.

TELEVISION – OVERTAKING RADIO IN URBAN MON STATE BUT HALF OF MON STATE RESIDENTS HAVE NEVER WATCHED

Turning to the findings on broadcast media, it is interesting to note that TV has overtaken radio as the most prevalent media device found in Mon State homes. Two-thirds of survey respondents in Mon State owned a TV as well as a DVD or VCD player. Patterns of TV ownership differed significantly by location, however. While 85% of urban respondents had a TV in their home, only 46% of respondents in former conflict areas had TVs.

Despite this, a large proportion of Mon State residents do not watch TV at all. Nearly half of the total sample said they had never watched TV (46%). The least frequent viewers were respondents in former conflict areas, of whom 70% had never watched TV, followed by rural respondents (51%). Further questions reveal that a high proportion of TVs across the state are not being used to access news and information. In rural locations, qualitative interviews indicated that because connecting to a satellite service like Sky Net was expensive, reception by antenna in rural areas poor, and the electricity supply often limited or costly, many rural villagers choose to watch movies on TV using a VCD or DVD player mostly at night just for entertainment. Nearly all respondents who used TV as a news and information source watched TV either in their own home, another family member’s home, or in the home of a neighbor (92%). Only 4% relied on a TV in a tea shop for their source of news, while the remaining 4% reported that the TV they relied on was in a temple, shop, or other location. Compared to urban and non-conflict area respondents, individuals living in rural and former conflict area were slightly more dependent on sources outside the home to watch TV, but only by a margin of 5-10%.

Furthermore, despite the growing popularity of Sky Net and other satellite TV services in Myanmar as a whole, most respondents in Mon State still receive TV broadcasts by antenna, meaning that they are watching the national broadcasters MRTV and MRTV4. Of the top four most recognized stations in Mon State, the government-owned MRTV stands out in particular for both popularity and viewership—100% of respondents who watch TV have heard of the station, and 98% of those who had heard of the station have watched it. Many of the qualitative interview respondents mentioned the popularity of MRTV, which features news, entertainment, game shows, American Idol-type song competitions, live sports, and Burmese and Korean soap operas. Unlike the Sky Net satellite TV



and many foreign TV stations, MRTV can be viewed in many locations in Mon State through the use of an antenna, although less so in more remote, rural locations.

TV is a powerful medium: it competes with other media for people’s time and attention, and it can typically erode audiences for radio and print. In the “disciplined democracy” model, the notion of flooding the broadcast market with entertainment is a known strategy (as in China).

“RADIO WAS POPULAR BEFORE. NOW THAT WE HAVE MORE ACCESS TO ELECTRICITY, TV HAS BECOME MORE POPULAR. THE RADIO IS LISTENED TO MOSTLY BY OLDER ADULTS. RADIO IS USED MORE IN AREAS WHERE THERE IS NO ELECTRICITY, LIKE VILLAGES. PEOPLE WOULD USE RADIO THERE MORE, TO LISTEN TO SHWE FM AND THE NEWS, FOR EXAMPLE.”

URBAN RESPONDENT, ZAR YAR MON WARD, KYAIK HTO TOWNSHIP

At least in the urban areas of Mon State, TV has replaced radio as the main source of news and information for respondents. In an interesting twist, the (formerly banned exile-based) Democratic Voice of Burma TV channel on satellite achieved high recognition alongside private satellite giant SkyNet. This is significant when considering the hugely different styles and resources of these stations. SkyNet offers over 70 channels of international and local content, including sports and entertainment, news and parliamentary coverage 24 hours a day, while DVB runs just two hours of programming a day running on a 24 hour loop, yet offers extremely rich and frequently controversial political and news content.

USE OF MEDIA AND TECHNOLOGY

MOST TRUSTED BROADCASTER: STATE TELEVISION MRTV

All of the above pose some interesting questions for the future of TV as a vehicle for news and information, especially when cross-referenced with the research findings that MRTV enjoys a very high degree of trust amongst audiences in Mon State (MRTV is most trusted by 91% of respondents). This finding may come as a surprise to those who have long assumed that state media enjoys little trust, especially amongst ethnic minority audiences. This factor of trust is considered in more detail in the next chapter – “Information Flows.”

The findings indicate that the MRTV “brand” is the most recognized and trusted, and is also currently more readily and cheaply available than Skynet on satellite. In that sense, MRTV has an excellent chance of maintaining strong audience share if it can maintain an edge in meeting audience need. Whilst much of the attraction of Skynet is the scores of international channels it carries, it is really in the area of Burmese language programming and/or Mon language programming where MRTV has an opportunity to secure audience share. This has clearly been recognized in the months since this research was completed: in late 2013 both MRTV and the formerly exiled Democratic Voice of Burma TV both launched ethnic language segments including Mon. As Skynet also has plans to introduce ethnic language programming, this is clearly the new frontier for the country’s broadcasters.

Increasing availability of local language TV programming in Mon State essentially heralds the beginning of an era that has rich potential for dissemination of locally relevant news and information. This trend has the potential in future to significantly disrupt the findings of the 2012 research as the ecosystem rearranges itself according to new patterns of sourcing and trust, depending on the quality and relevance of the programming provided.

RADIO - MOST TRUSTED SOURCE FOR INFORMATION IN FORMER CONFLICT AREAS

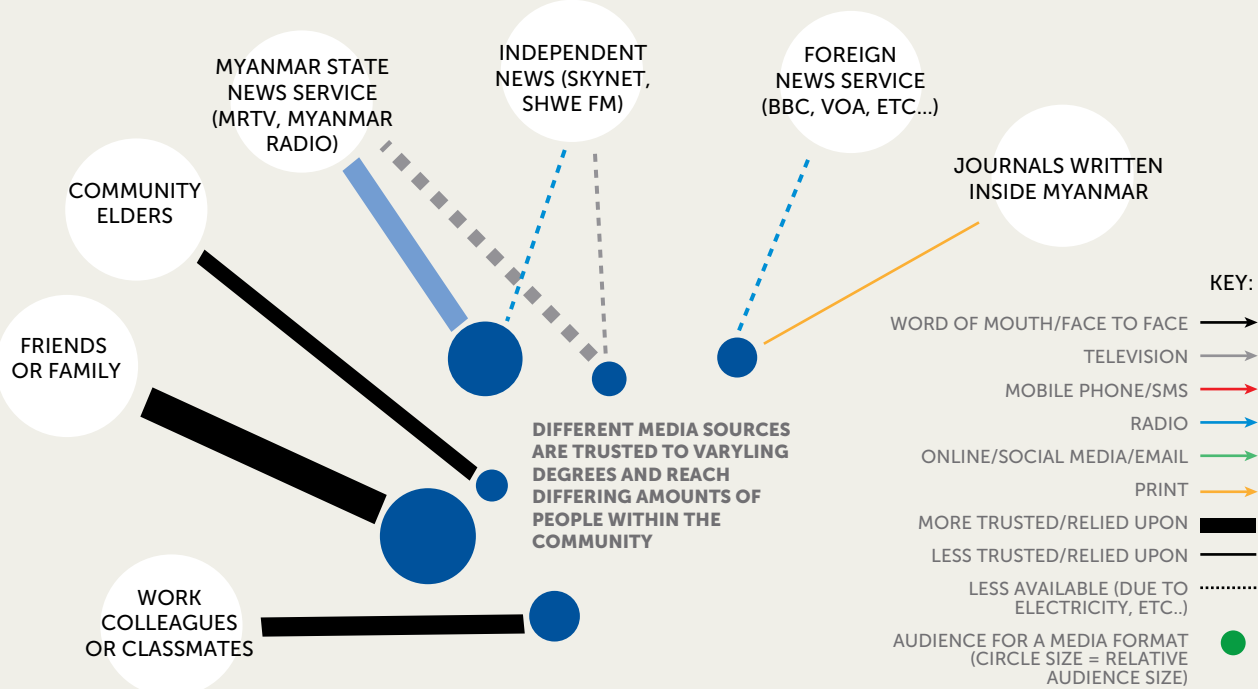
Radio is the second most used media device in Mon State. 59% of all respondents have a radio in the home. Radio ownership is more prevalent in rural households compared to urban homes, with 61% of rural respondents owning one, compared to 49% of urban respondents, and also more common in non-conflict areas (60% of respondents) than former conflict areas (48%). Nearly every radio listener (98%) used a battery-powered transistor radio.

In qualitative interviews in Mon State’s former conflict areas, respondents reported that radio is the main and preferred source for news and information, including the latest news, weather report, music, talk shows, and Buddhist teachings. In these areas radio still provides the only means of accessing immediate information. As one respondent reported, “fast, breaking news is only available by radio.”

In the realm of radio, the advent of commercial FM stations in Myanmar, where all radio broadcasting was previously the monopoly of the state, has fuelled much of the optimism around the openings in the media sector. However in Mon State, the state-owned Nay Pyi Daw Myanmar Radio National Service was both the most recognized (by 100% of respondents), most listened to (by 98%) and most trusted (by 94%). A government owned FM station, Padauk Myay, was also better recognized and attracted more listeners than the privately owned Shwe FM.

These findings pose interesting questions about the future trajectory of radio listenership in Mon State, and the extent to which radio may be harnessed as a vehicle for the introduction of meaningful local content into the information ecosystem. Shwe FM

DIAGRAM 1
HOW NEWS IS RECEIVED, DISCUSSED, AND SHARED IN MON STATE (FORMER CONFLICT AREA)
MON STATE - FORMER CONFLICT AREA



in Mon State is part of a nationwide network owned by the Shwe Than Lwin Company that also includes Skynet. The Chairman of this media giant, Kyaw Win, is close to the President and is known to have strong ties to the military. Programming on the Shwe FM network tends to be anodyne, with a high proportion of music and “soft” content (i.e. health, religion,

farming) and several of the daily news bulletins still come directly from the Ministry for Information. News and information production is largely centralized in Yangon and syndicated around the network. Network stations in areas such as Mon State are not equipped or required to cover local news with any degree of consistency. The Shwe FM network has enormous

USE OF MEDIA AND TECHNOLOGY

potential to localize and improve the quality of its news and information programming, but with rising audiences across the country and robust financial backing for the current model, there is currently little incentive for it to take risks on groundbreaking news and information programming.

“RADIO IS THE MOST POPULAR IN THIS AREA BECAUSE WE DON'T HAVE TIME TO WATCH TV, AND JOURNALS ARE ONLY AVAILABLE IN KYAIK HTO TOWN. MOREOVER, THERE IS NO ELECTRICITY AND THE FUEL COST FOR GENERATORS IS EXPENSIVE TO WATCH TV.”

RURAL RESPONDENT,
NGA PYAW TAW VILLAGE, KYAIK HTO TOWNSHIP

INTERNATIONAL RADIO - PERCEIVED BIAS IN COVERAGE OF CONFLICT IN RAKHINE STATE

Another significant finding is that (unlike foreign TV stations) foreign radio stations are well known by respondents in Mon State. 90% or more of radio listeners recognized three foreign radio stations in particular—BBC World Service, Voice of America (VOA), and Radio Free Asia (RFA). Qualitative interviews indicated that BBC, VOA, and RFA were popular among respondents for their news content, especially for international news. This finding correlates with those of the BBG/Gallup audience survey in the same time period, and demonstrates the enduring importance of independent radio coverage on shortwave during the decades of military rule.

The finding appears to make a case for the viability of these shortwave channels to continue to be significant sources of news and information to the people of Mon State in the future. However serious consideration needs to be given to the more nuanced, and perhaps less rosy outlook brought to the surface by the ecosystem research responses on trust. Not only did state-owned radio show up as significantly better recognized and trusted than the international stations, but qualitative research revealed mixed or decreased trust in foreign news sources, primarily due to strong perceptions among some respondents of biased reporting on the conflict between Buddhists and Muslims in Rakhine State by foreign news media. Many respondents felt the Rohingya were given greater importance by foreign media, while the points of view of Buddhists were suppressed .

As a result, some respondents felt that the foreign media were “discriminatory” and reported “incorrect news.” One rural respondent commented, “earlier, the BBC was considered very trustworthy, but now local radio

The 2012 Rakhine State riots were a series of conflicts primarily between ethnic Rakhine Buddhists and Rohingya Muslims in northern Rakhine State, Myanmar, though by October Muslims of all ethnicities had begun to be targeted. The riots came after weeks of sectarian disputes and have been condemned by most people on both sides of the conflict. The immediate cause of the riots was unclear, with many commentators citing the rape and murder of a Rakhine woman and the following killing of ten Burmese Muslims by ethnic Rakhine as the main cause. The Myanmar government responded by imposing curfews and by deploying troops in the regions. On 10 June, state of emergency was declared in Rakhine, allowing military to participate in administration of the region. As of 22 August, officially there had been 88 casualties – 57 Muslims and 31 Buddhists. An estimated 90,000 people have been displaced by the violence. About 2,528 houses were burned, and of those, 1,336 belonged to Rohingyas and 1,192 belonged to Rakhines. The Burmese army and police were accused of playing a leading role in targeting Rohingya through mass arrests and arbitrary violence.

channels are more trustworthy and dependable.” Trust in information from news sources inside Myanmar has changed substantially as a result of a bias perceived by an overwhelmingly Buddhist audience.

“IN THE PAST I TRUSTED OVERSEAS NEWS, BUT NOW I KNOW THEIR NEWS IS NOT TOTALLY CORRECT. NOW I FEEL LIKE THEY ARE TRYING TO INCITE SOMETHING BETWEEN THE PEOPLE AND THE GOVERNMENT. DVB NEWS IS ALSO INCORRECT. THEIR NEWS IS NOT EXACT AND MAKES AN INSTIGATION BETWEEN THE PEOPLE AND THE GOVERNMENT.”

RURAL, FORMER CONFLICT AREA RESPONDENT, MALE,
AGE 31-45, KAW DUT VILLAGE, YAY TOWNSHIP

“SOMETIMES I LISTEN TO BBC, RFA, AND VOA FOR POLITICAL AND ECONOMIC NEWS ABOUT MYANMAR. MOST OF THE YOUNGER GENERATION PREFERS TO LISTEN TO THE SONG REQUESTS. BUT I LIKE THE THREE OVERSEAS STATIONS.”

RURAL RESPONDENT,
NGA PYAW TAW VILLAGE, KYAIK HTO TOWNSHIP

Another reason cited by respondents for a decreasing reliance on foreign media was the improvement in quality and quantity of local news options. Respondents explained that during the days of the prior military regime, there was no other option except to rely on foreign news and broadcasting. Now, however, with the new government and changes in policy in almost every area, people feel the government news stations are giving up-to-date and accurate information about Myanmar. As a result, respondents said the popularity of foreign news sources including BBC, VOA, RFA, and DVB is actually diminishing.

USE OF MEDIA AND TECHNOLOGY

PRINT – THE NEED FOR LOCAL LANGUAGE PUBLICATIONS

The role and influence of the print media in the information ecosystem of Mon State has historically not just been limited by draconian censorship. Other factors include literacy levels, the total absence of any locally published Mon language publications, and remoteness from Yangon where independent newspapers and journals have always struggled to maintain distribution networks beyond the urban centers. In recent years the quantity of available print media has increased, as the wealthier Yangon media houses have expanded their range of lifestyle and business/trade publications. Qualitative respondents noted government newspapers such as The Mirror and The New Light of Myanmar were the only sources of information in the past, but now many magazines, daily newspapers, and weekly news journals are currently available in Mon State, providing news and information about local, national, and international events.

However, all considerations around the future relevance of the print media in Mon State’s information ecosystem must be subject to an understanding of the negative national-level pressures described in Michelle Foster’s “The Business of Media in Myanmar” summed up thus: “Independent newspapers could face financial ruin as they increase reporting, production, newsprint and distribution costs to produce a daily product. Those most likely to have access to sustaining capital will be big businesses and/or cronies. The market will be skewed as state-owned dailies transform into public service media and compete with independent media for advertisers.”¹⁹

As with TV and radio, the significance of print media inputs to the Mon State ecosystem will depend on their relevance and “trustability” to local audiences, factors that can almost certainly be significantly enhanced by production in the local language. It is interesting to note that one of the most recognized newspaper titles

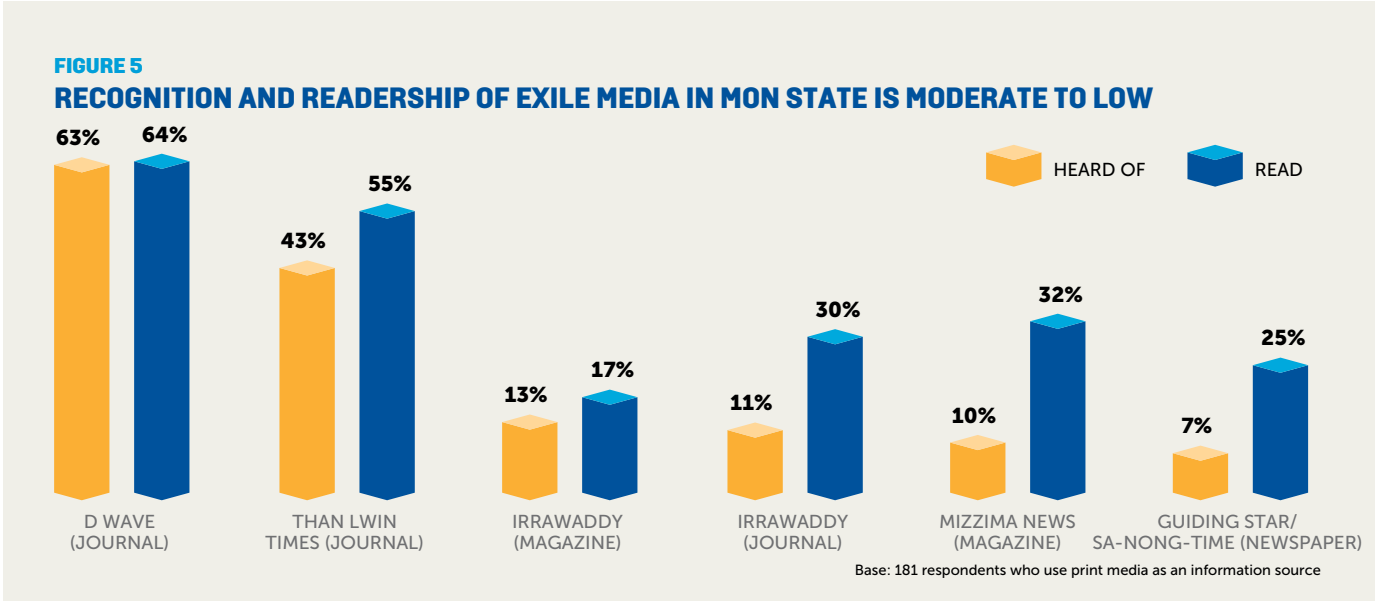
to Mon State audiences was that of the Than Lwin Times, a small and erratic Mon language newspaper produced for a limited time in 2011 and 2012 by associates of the New Mon State Party that for more than 10 years smuggled thousands of copies of the “Guiding Star” newspaper from their base in exile in Thailand.²⁰

Referring back to the earlier discussion in this paper of exiled media efforts, it is worth noting here that no respondents identified the “Guiding Star” as a recognized publication. It is possible that this is a function of the limited areas in which the exile networks were able to distribute their publications, primarily in conflict and ceasefire areas dominated by the NMSP.

For now, awareness of formerly exiled media in Mon State is confined to the success stories of the internationally based shortwave services BBC, VOA, RFA and (most strikingly) DVB. Future iterations of information ecosystem research in Mon and other ethnic states in Myanmar could perhaps be oriented to explore more deeply the historical role of exiled media in the information ecosystems of conflict-affected areas. The influence of formerly exiled media could also be expected to show up in future information ecosystem research as exiled groups establish a firmer footing inside the country, and bring their local language media capacity to media start-ups in places like Mon State where such capacity has been historically non-existent.

THE NEW LIGHT OF MYANMAR AND KYAYMON ARE GOVERNMENT NEWSPAPERS, SO THEY MAINLY CONTAIN OFFICIAL NEWS ABOUT THE GOVERNMENT. THEY ARE KNOWN THROUGHOUT THE WHOLE COUNTRY AND WIDELY USED BECAUSE THE PRICE IS CHEAP AND THEY ARE AVAILABLE EVERYWHERE. MANY HOUSEHOLDS HAVE THEM."

URBAN RESPONDENT, ZAR YAR MON WARD, KYAIK HTO TOWNSHIP



19 MICHELLE FOSTER, "THE BUSINESS OF MEDIA IN MYANMAR" (INTERVIEWS, 2013), P18.

20 THE INDEPENDENT MON NEWS AGENCY (IMNA) WAS ESTABLISHED BY FORMER MON STUDENTS, YOUTH AND DEMOCRATIC ACTIVISTS BASED IN MON STATE IN 1999. BASED IN THAILAND AND MYANMAR, THE IMNA NEWS AGENCY COVERS MYANMAR NEWS ESPECIALLY RELATED TO MON COMMUNITIES IN THAILAND AND MYANMAR DISTRIBUTED VIA PRINT, RADIO AND INTERNET. THE MON LANGUAGE PUBLICATION "GUIDING STAR" IS PRODUCED MONTHLY BY IMNA. GUIDING STAR WAS GRANTED TEMPORARY AUTHORIZATION TO PUBLISH INSIDE MYANMAR IN FEBRUARY 2013. "PUBLICATION OF MON LANGUAGE NEWS JOURNALS PERMITTED," INDEPENDENT MON NEWS AGENCY, <http://monnews.org/2013/02/21/publication-of-mon-language-news-journals-permitted/>, (AUGUST 14, 2014).

INFORMATION FLOWS

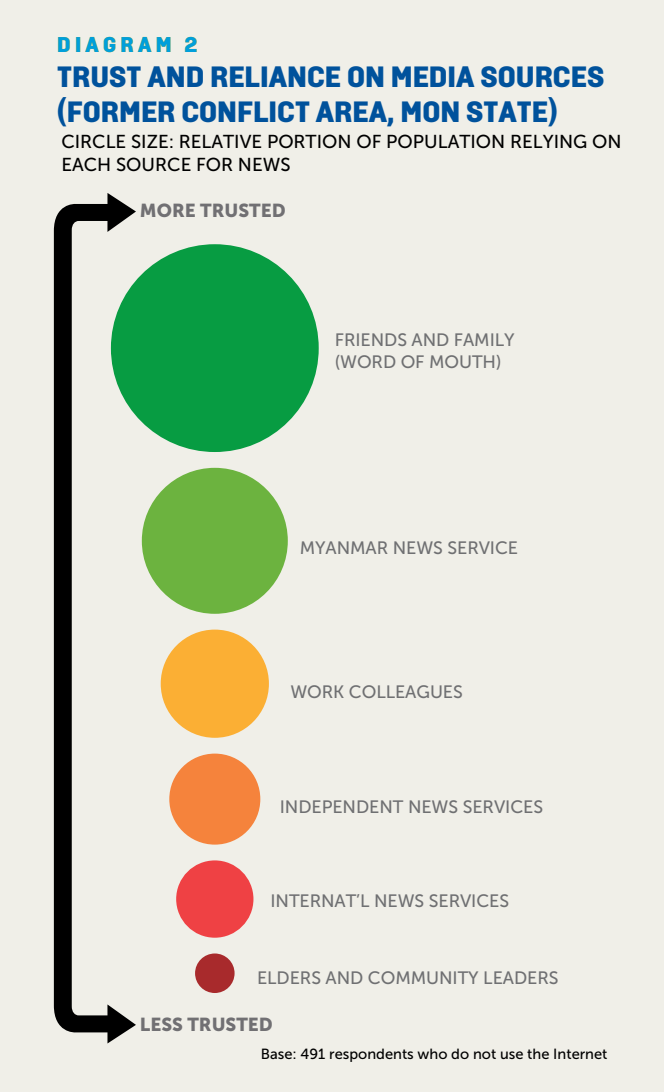


People watching a movie on TV at Bus Station – Zay Yah Mon.

Having considered the findings on how changing media access and content are influencing the “supply side” of the information ecosystem of Mon State, and having noted some of the significant quirks of the trust factors in the ecosystem, it is important to look at the notion of how information flows once it enters the ecosystem. Information flow is closely linked to trust patterns and the ways in which communities organize themselves. Where information from media or elsewhere enters the ecosystem in just a few places, e.g. a handful of radios, mobile phones or TVs accessible to just a handful of people, it is useful to understand how that information is subsequently shared and exchanged across the community. This can be helpful to stakeholders who seek to redress unequal or uneven access to information.

This section of the research that explored the flow and exchange of news and information in Mon State revealed that while primary information sources varied by location and context, the mode and locations in which individuals in Mon State share information are remarkably similar.

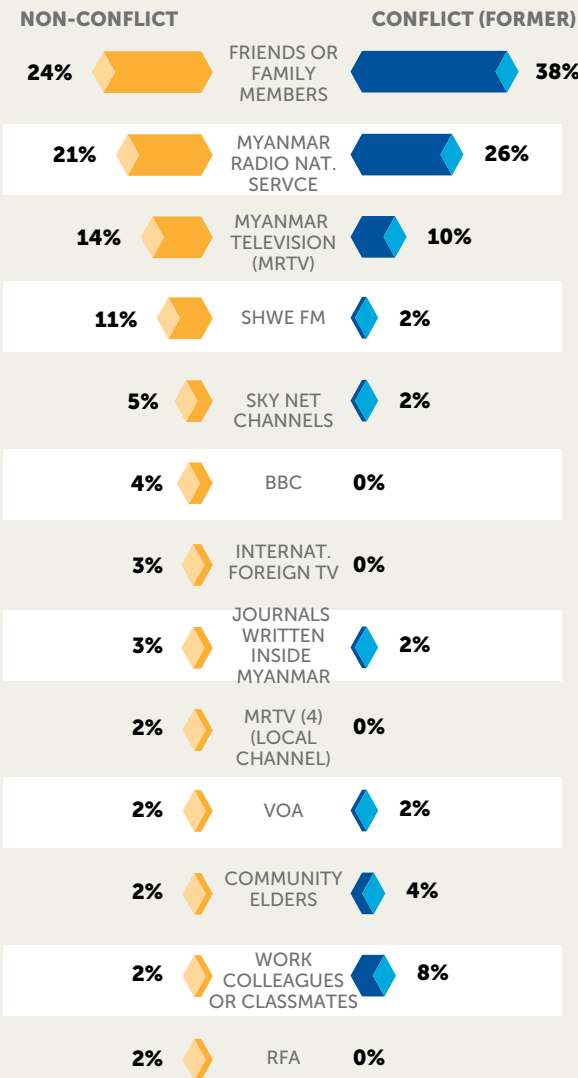
In terms of sourcing, most people in urban areas get their news through TV. In rural and former conflict areas, radio is the most common source. Once information enters a community, however, its flow is overwhelmingly face-to-face sharing through word of mouth. Moreover, this information flow largely takes place in the home (78% of respondents), and to immediate friends and family. Indeed, only 28% of respondents saw themselves as a source of news for the greater community, indicating that most information exchange tends to stay close to home.



INFORMATION FLOWS

FIGURE 6
FIRST SOURCE FOR MORE INFORMATION

(WHEN YOU HEAR THERE IS A MAJOR EVENT THAT YOU THINK IS IMPORTANT WHAT DO YOU DO TO FIND OUT MORE INFORMATION?
· WHO OR WHAT WOULD BE THE FIRST SOURCE YOU WOULD GO TO FIND OUT INFORMATION?)



Base: 450 non-conflict vs. 50 former conflict area respondents

Outside the home, other (fairly predictable) modalities exist for information dissemination and exchange. For Mon State residents interested in exchanging news and information, tea shops feature as a prominent nodal point to watch TV, read newspapers, and exchange information in general. Local authorities featured highly in qualitative interviews as key community information disseminators, by word of mouth, although they did not factor highly overall in the quantitative data. Communities also tend to have a few key local information brokers whom they know to go to for news, simply because these particular people follow the news.

TRUST AND VERIFICATION – NO SINGLE SOURCE IS 100% TRUSTED

Illustrating the relationship between sourcing, flow and trust, respondents had a high degree of trust in news from a familiar source, news spread by word of mouth, news shared by elders and local authorities or news presented with video or photographs. Despite this, respondents repeatedly expressed that they did not trust any news source completely. This somewhat surprising degree of sophistication is possibly a legacy of the country’s history of information manipulation and propaganda. Instead, most respondents felt the need to always validate information against other sources. A notable theme was that triangulation was essential prior to fully trusting any information or passing such information on to others. The evidence cited earlier - of how perceived bias in recent foreign news coverage has been enough to seriously undermine decades of trust in the BBC - points to the fragility of trust in external sources compared to news received from family, friends and other trusted people, or news that can be triangulated or personally verified.

FIGURE 7
CHANGES IN TRUST IN NEWS SOURCES ACROSS ETHNICITIES

QUESTION: “COMPARED TO 3 YEARS AGO, HAS YOUR TRUST IN INFORMATION FROM INSIDE MYANMAR CHANGED OVER THE PAST THREE YEARS? DO YOU TRUST INFORMATION FROM MYANMAR MORE, LESS, OR THE SAME AS BEFORE?”

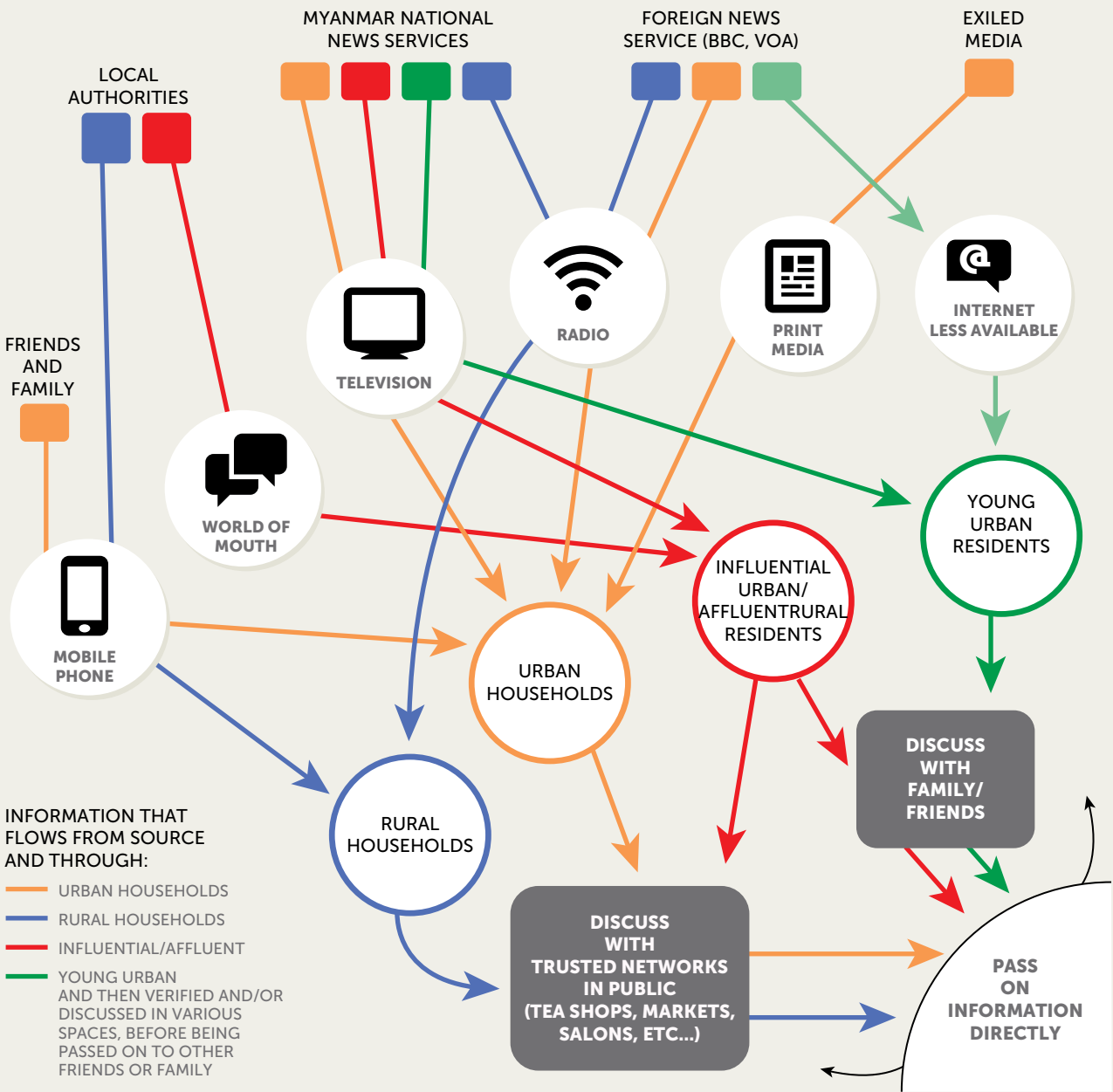
	BAMAR	KAREN	SHAN	MON	RAKHINE	KARENNI (KAYAH)	CHINESE	INDIAN/PAKISTANI/BANGLADESHI/NEPALI	OTHER	MIXED
Same as before	51%	42%	17%	40%	0%	0%	0%	35%	22%	70%
I trust Myanmar sources more	38%	46%	83%	52%	100%	0%	100%	46%	44%	20%
I trust Myanmar sources less	2%	0%	0%	1%	0%	0%	0%	19%	0%	0%
Don't know	9%	12%	0%	7%	0%	100%	0%	0%	33%	10%

“ THERE IS A 50-50 CHANCE FOR THE TRUSTWORTHINESS OF NEWS RECEIVED FROM VARIOUS SOURCES. SOME NEWS IS BEING EXAGGERATED OR SOME NEWS IS UNDERSTATED. TO DECIDE IF NEWS IS CREDIBLE OR NOT: IF I SEE IT WITH MY OWN EYES OR A VERY CLOSE FRIEND HAS MENTIONED IT TO ME, ONLY THEN DO I TRUST IT. THAT IS HOW I VALIDATE.”

URBAN RESPONDENT, NON-CONFLICT AREA, PABEDAN WARD, MAWLAMYINE TOWNSHIP

INFORMATION FLOWS

DIAGRAM 3
HOW NEWS IS RECEIVED, DISCUSSED, AND SHARED IN MON STATE (URBAN AND RURAL)



INFORMATION FLOW MAPPING

Understanding the mechanics of information flow and the relative importance of different nodes or influencers in these exchanges is a critical aspect of information systems. Once information enters a given community it may then travel through multiple routes to various consumers. The path of information is highly nuanced. For different types of information these routes may look quite different. Identification of critical information disseminators within a system and how these individuals or groups communicate provides excellent intelligence for the design of information content and delivery.

The chart below shows the flow of what can be described as current affairs news and information. Issues considered for this mapping included land issues, ethnic conflicts, election news, copper mine conflict, earthquake in Sagaing, and other Myanmar news. The flow of news and information from the urban areas where access to primary sources is much greater, to relatively information poor rural areas, through influential nodes is clear. Be they respected elders, affluent rural or officials, such nodes may vary according to the types of information being conveyed as might the means of this transmission. For example, through officials in more affluent areas, transmission is conducted to rural areas primarily via phone to trusted elders and family members. These disseminators in turn communicate with their networks of trusted family and community members at locations such as tea shops, religious ceremonies and home visits.

Additional mapping based on different types of news (i.e. community, religious, social welfare, weather, health etc.) are presented in Part 2 of this document.

INFORMATION FLOWS IN ACTION – CASE STUDIES

An important element of the research design was a series of case studies that sought to provide clear examples of the flow and impact of information access and exchange for three different kinds of event. The first case, following a natural disaster, examines the flow of news and information in Mon State after a 6.8 magnitude earthquake struck Sagaing and Mandalay Regions on November 11, 2012. The second case, international affairs, examines the flow of information about the historic visit by U.S. President Barack Obama to Myanmar on November 19, 2012. The third case, regional, examines the flow of news and information after communal violence between Rakhine Buddhists and Rohingya Muslims first broke out in Myanmar in June 2012.

Of these three events, news of the earthquake disaster and Rakhine conflict traveled much further than word of President Obama's visit. While 83% of the sample had heard of the earthquake and 82% had heard of the Rakhine conflict, just 60% heard of President Obama's visit. This indicates that in the future, news of domestic crises may spread more widely within the country than events primarily of foreign or international significance. Indeed, while 95% of respondents were fairly or very interested in disaster news or weather forecasts, even as Myanmar opens, just 40% were interested in international news.

INFORMATION FLOWS

CASE STUDY 1: EARTHQUAKE IN SANGAING AND MANDALAY REGIONS, NOVEMBER 2012

On November 11, 2012, an earthquake measuring 6.8 on the Richter scale struck Sagaing and Mandalay Regions, killing at least 16 people, injuring 52, and damaging nearly 600 buildings. News of the earthquake was more widely heard within each of the four geographical locations (urban/rural, former conflict/non-conflict) than the other two case study events with one exception: the Rakhine conflict was heard of by the highest percentage of respondents in the former conflict areas (68%).

News of the earthquake arrived primarily by word of mouth through friends in urban areas (33% of respondents) and domestic TV (23%), while in rural areas most heard of the news by domestic radio (40%), close friends (23%), or TV (19%). In the former conflict areas, most people heard by domestic radio (34%) or from close friends (31%), or through family or relatives (17%). Of all Mon State respondents, a mere 4% or less heard about the disaster through foreign TV or radio, journals, newspapers, or the Internet.



A man walks near a Buddhist pagoda that was badly damaged by the earthquake in the village of Ma Lar at Kyauk Myaung township November 11, 2012. © REUTERS/STRINGER

“WHEN THERE WAS AN EARTHQUAKE IN MANDALAY, MY SISTER GAVE ME A CALL AND THAT’S HOW I LEARNED ABOUT IT. I THEN PASSED THIS INFORMATION ON TO OTHERS.”

FEMALE, 46 YEARS OLD, RURAL, FORMER CONFLICT AREA, PA LAING KEE VILLAGE, YE TOWNSHIP

DIAGRAM 4
NOVEMBER 2012 EARTHQUAKE: NEWS FLOWS

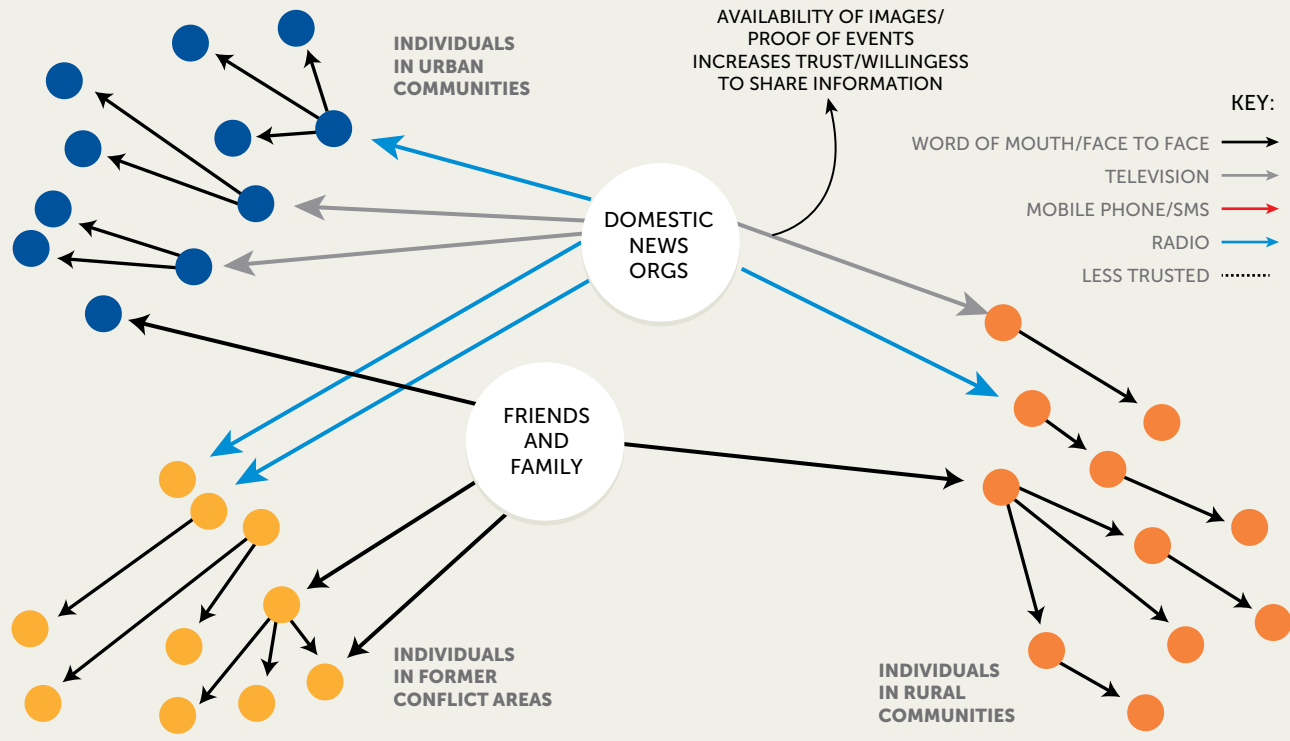
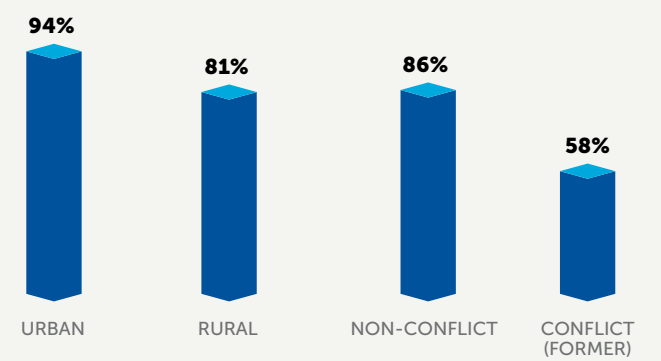
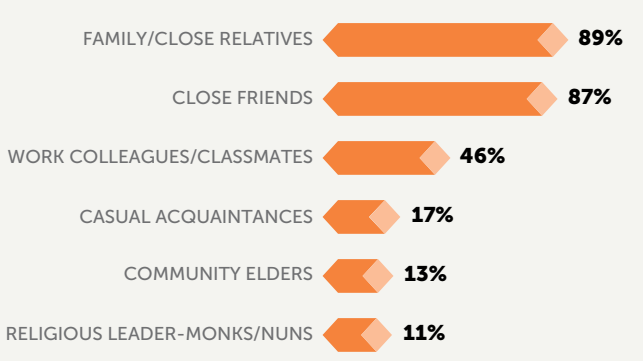


FIGURE 8
PERCENTAGE OF RESPONDENTS WHO HAD HEARD OF THE EARTHQUAKE



BASE: 417 RESPONDENTS WHO HEARD OF THE EARTHQUAKE

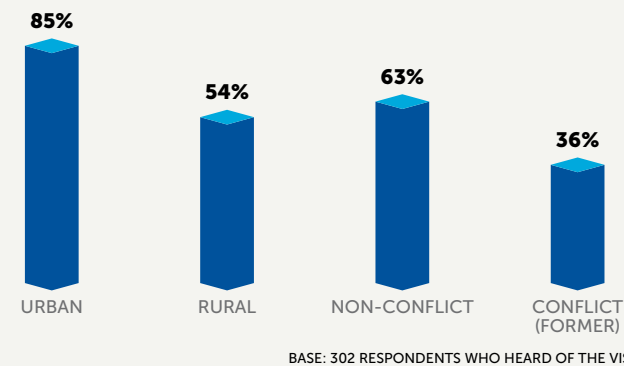
FIGURE 9
WHOM DID YOU TALK TO ABOUT THE EARTHQUAKE AFTER YOU FIRST HEARD?



BASE: 319 RESPONDENTS WHO TOLD OTHERS

INFORMATION FLOWS

FIGURE 10
PERCENTAGE OF RESPONDENTS WHO HAD HEARD OF PRESIDENT OBAMA'S VISIT TO MYANMAR



Women walk pass a wall with graffiti welcoming U.S. President Barack Obama on a street side in Yangon, Myanmar, November 11, 2012. Obama will visit Myanmar later in November. © REUTERS/SOE ZEYA TUN

CASE STUDY 2: U.S. PRESIDENT BARACK OBAMA'S VISIT TO MYANMAR, NOVEMBER 2012

On November 19, 2012 U.S. President Barack Obama visited Myanmar, the first sitting U.S. president in history to do so. The trip was seen as a U.S. affirmation of Myanmar's nascent political, social, and economic reforms, and the president used a speech at the University of Yangon to push for further reform and reconciliation. Burmese residents in Yangon turned out in the hundreds and lined the streets to await the president's motorcade.

While the news surrounding President Obama's visit flowed widely in urban areas of Mon State, news traveled to a far lesser extent—in fact the lowest of the three case studies—in Mon State's rural, non-conflict, and former conflict areas. This may in part be due to the brevity of the news event: the president was on the ground in Yangon for a total of six hours. But it is also due to the fact that most of Myanmar's rural and remote population tends to have little interest in international events, instead focusing on their daily lives, or at most, important domestic events.

Similar to the Sagaing and Mandalay earthquake, TV and radio proved to be the most important sources for this news in urban and rural locations, respectively, followed by close friends. Of note in this case is the higher percentage of rural people who heard of the event by foreign radio (10%). In the rural areas, respondents specifically interested in political news tune in particularly to foreign radio broadcasts.

In Mon State's former conflict areas, it is also interesting to note the higher percentage of villagers who heard this news through community leaders in their village (11%), compared to non-conflict areas. For areas that tend to be very remote, villagers tend to rely more extensively on local leaders and authorities for information about news outside of the village. For villagers who first heard from others by word of mouth, a higher percentage of those they heard from also heard the news from leaders in the community (29%), including monks (14%), and local government officials (14%).

THE NEWS ABOUT PRESIDENT OBAMA'S VISIT TO MYANMAR WAS SHARED BY THE PEOPLE WHO WATCHED IT ON SATELLITE TV".

FEMALE, AGE 46, RURAL, FORMER CONFLICT AREA, PA LAING KEE VILLAGE, YE TOWNSHIP

MRTV BROADCASTED THE NEWS LIVE OF OBAMA'S VISIT, SOME PEOPLE WATCHED IT AND TOLD US. I READ THIS IN A JOURNAL."

- FEMALE, AGE 24-30, RURAL, FORMER CONFLICT AREA, KAW DUT VILLAGE, YE TOWNSHIP

DIAGRAM 5
PRESIDENT OBAMA'S VISIT IN NOVEMBER 2012: NEWS FLOWS

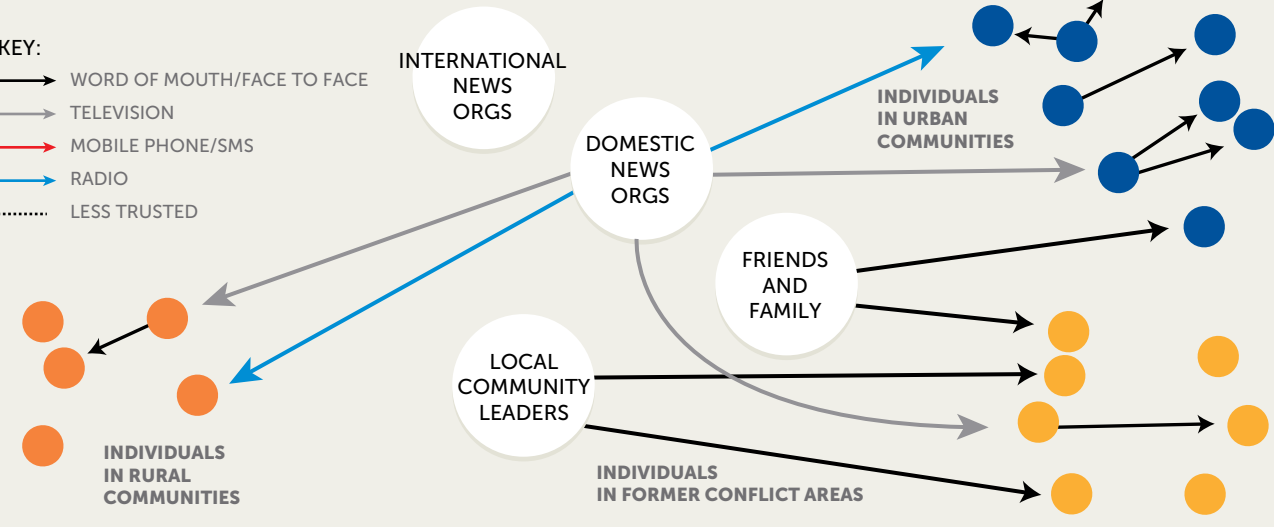
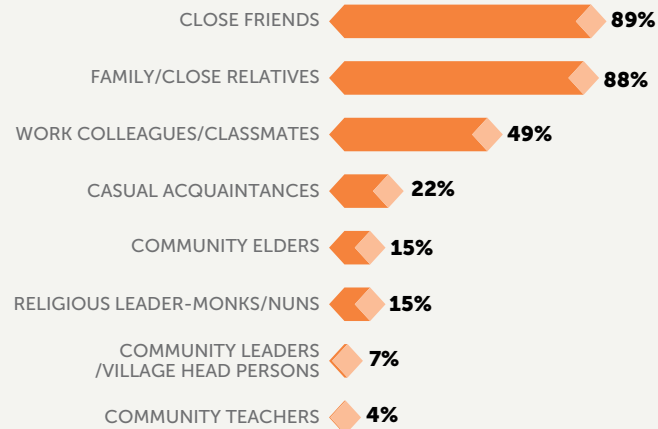


FIGURE 11
WHOM DID YOU TALK TO AFTER YOU FIRST HEARD ABOUT OBAMA'S VISIT?



BASE: 189 RESPONDENTS WHO TOLD OTHERS ABOUT THE VISIT

For villagers in the former conflict areas who heard via TV, state-run MRTV and SkyNet satellite TV were the main sources. After hearing the news, a majority in urban, rural, and non-conflict locations, albeit a smaller one, told others about it. Yet in the former conflict areas, in the only instance of the three cases, the majority did not tell others by a fairly large margin (61%). Perhaps this is because fewer people in the former conflict areas saw this news as applicable to them. This is not surprising, for life has continued without much change in remote rural areas, with most visible signs of political and other reforms limited to urban centers. Among those who did share news about the President Obama's visit, 22% told 1-5 others, 29% told 6-10 others, and 11% told 11-25 others.

INFORMATION FLOWS

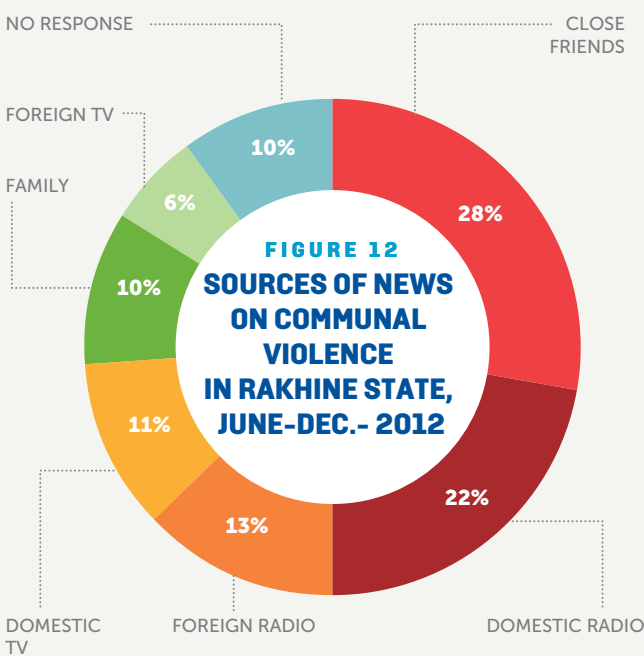
CASE STUDY 3: COMMUNAL VIOLENCE IN RAKHINE STATE, JUNE – DECEMBER 2012

The communal violence that first broke out in June 2012 between Rakhine Buddhists and Rohingya Muslims in Rakhine State has tragically continued to spread to other areas of Myanmar. Behind the violence lie previously existing tensions between Buddhists, Muslims, and those of South Asian descent, inflamed by recent events and even the greater media freedom that now exists.

As explained in the section of this report on trust and influence, the differences between domestic coverage of the conflict and foreign coverage, with the former tending to be more sympathetic to the side of Myanmar Buddhists and the latter far more critical of events and supportive toward the Rohingya, have caused unprecedented bias against foreign news sources.

In Mon State, 82% of respondents heard of the news of the violence in Rakhine State. News of the violence arrived by word of mouth through close friends (28% of those who heard), domestic radio (22%), foreign radio (13%), domestic TV (11%), family (10%), and foreign TV (6%). Similar trends regarding TV and radio use in urban and rural locations held in this case as well.

After receiving the news from foreign media sources, some respondents doubted the news' authenticity, due to the distance of the events from Mon State, and perhaps due to bias generated by the more critical foreign reports.



One minor theme within the research did point to a sentiment among respondents that foreign news sources were not always accurate for news happening inside Myanmar because they were far from the events, and in some cases, got the details wrong. Similar trends regarding the sharing of information presented themselves, as in the other cases. Yet because of the racial and religious sensitivities of the issue, some people were also more hesitant to share the news.

“WE JUST KNEW ABOUT THE NEWS OF THE RAKHINE CONFLICT BY WAY OF PEOPLE WHO CAME BACK FROM THE AREA. ALTHOUGH WE HEARD THIS NEWS FROM OVERSEAS RADIO CHANNELS AND WE READ IT IN THE JOURNALS, WE DIDN'T TRUST THEIR NEWS AT FIRST. FOR US, THE CONFLICT WAS HAPPENING SO FAR FROM US, THAT WE COULDN'T DECIDE IF THIS NEWS WAS CORRECT OR NOT.”

MALE, AGE 60, RURAL, FORMER CONFLICT AREA, KAW DUT VILLAGE, YE TOWNSHIP

FIGURE 13 HAVE YOU HEARD OF RECENT EVENTS IN RAKHINE STATE?

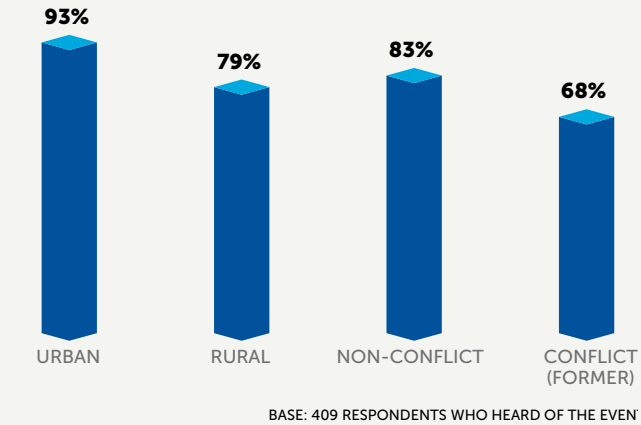


FIGURE 15 WHOM DID YOU TALK TO ABOUT THE ROHINGYA EVENTS AFTER YOU FIRST HEARD ABOUT THEM?

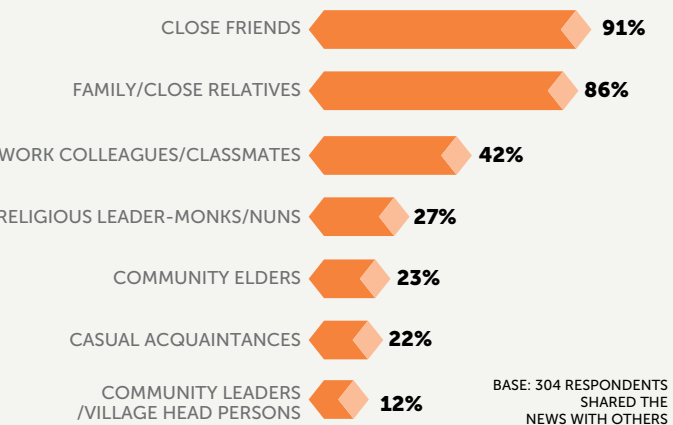
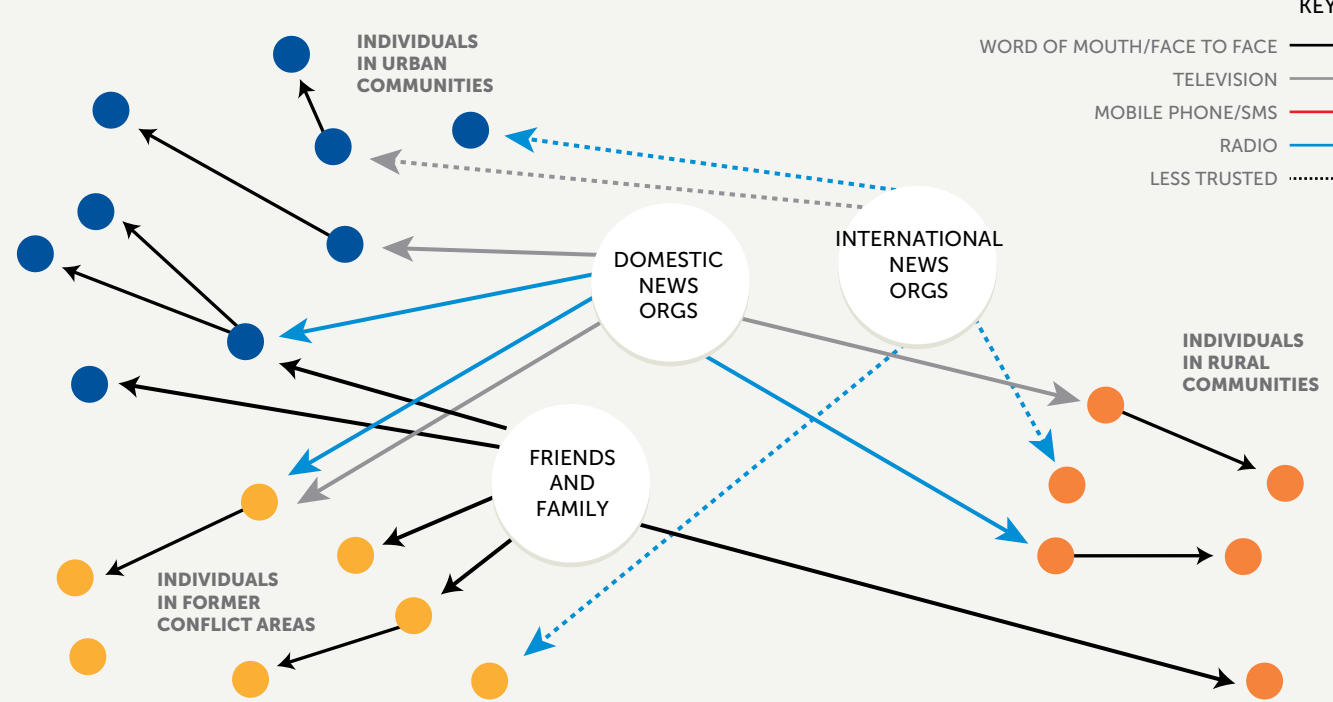


DIAGRAM 6 COMMUNAL VIOLENCE IN RAKHINE STATE, 2012: NEWS FLOWS



CONCLUSIONS & RECOMMENDATIONS



A house with two satellite dishes in Hyaik Hto town © UNICEF / DHIRAJ SINGH

CONCLUSION

This study has found that the flow of information in Mon State is marked primarily by key differences between urban and rural contexts. These differences will have implications for the ability of Myanmar authorities and international organizations to respond and deliver prompt information and aid in the event of a future natural disaster or emergency.

While in urban areas information is flowing increasingly through the use of TV and mobile phones, in Mon State's rural areas prompt receipt of information is often possible only by radio. In both urban and rural areas most respondents still trust and rely heavily on information obtained by word of mouth through trusted interpersonal sources. In the most remote areas, villagers also depend to a significant extent on information obtained from local authorities. Furthermore, Mon State residents depend more than ever before on news and information obtained from domestic media sources.

The future relevance of print media in Mon State's information ecosystem is subject to negative national-level pressures, as independent newspapers could face financial ruin in efforts to produce a daily product. Those most likely to have access to sustaining capital will be those who are already influential and powerful in the media sector (i.e. big businesses and cronies). The market may be further skewed as state-owned dailies transform into public service media and compete with independent media for advertisers.

For now, awareness of formerly exiled media in Mon State is confined to the success stories of the internationally based shortwave services BBC, VOA, RFA and (most strikingly) DVB. Future iterations of information ecosystem research in Mon and other ethnic states in Myanmar could perhaps be oriented to explore more deeply the historical role of exiled media in the information ecosystems of conflict-affected areas. The influence of formerly exiled media could also be expected to show up in future information ecosystem research as exiled groups establish a firmer footing inside the country, and bring their local language media capacity to media start-ups in places like Mon State where such capacity has been historically non-existent.

CONCLUSIONS & RECOMMENDATIONS

The research provides cross-case analysis that is likely to have relevance to the information ecosystems of other ethnic states in Myanmar: comparing non-conflict and former conflict zones across Mon State. Former conflict areas have the highest proportion of people who do not share news and information at all (26%), further indicating the challenges to information dissemination in these remote communities. A primary factor appears to be simply the daily toil to maintain a basic existence, giving little time for other interests or pursuits. This seems to indicate that differences in media technology use and information flow are caused more by the greater remoteness of Mon State’s rural, former conflict areas, than by being a conflict area in the past. However it should be borne in mind that the remoteness of former conflict areas was more than simply a geographical feature affecting respondents. The discriminatory nature of the conflict itself served to isolate and under-develop affected communities by cutting them off from education and economic opportunities while subjecting them to societal stresses and human rights abuses ranging from surveillance and displacement to arbitrary arrest, torture, rape and forced labor. Anecdotal evidence suggests that people in conflict affected areas experiencing constant stress and fear develop situation-specific modes of dealing with information. Future research would benefit from methodological enhancement that probes in more detail the “then and now” nuances of information flows in former conflict areas.

In the next iteration of this research the intention is to dive much more deeply into the nuances of these relationships – tools such as social network analysis and more design/ethnographic approaches will be added to the research design. Likewise advanced mapping tools will be used to visualize these dynamic interactions.

LESSONS LEARNED

Conceived as a pilot study, the Mon State research has not only provided rich and stimulating insights, it has also highlighted some key areas of refocus and design going forward.

1. RESEARCH DESIGN

Generally the research design worked well, utilizing a mixed methods approach combining a rigorous quantitative framework supplemented and reinforced with a variety of qualitative/applied elements.

As hoped, research aiming to provide insight into trust and influence proved most interesting.

Deeper investigation into the role and impact of diaspora media and other external information flows will also be an interesting focus. Firstly, it will give a historical evaluation of these types of activities for planning and design of future strategies and activities. Secondly, it will provide insights into how trust can evolve in communities undergoing rapid changes.

The Center for Innovation & Learning’s other work in information ecosystems will help to add new questions and avenues as the research proceeds. Frequent synthesis sessions with the field teams and key researchers will allow previous unidentified areas of interest to emerge; testing of assumptions and hypotheses, and so on. Additionally, use of techniques such as social network analysis will support a more granular understanding of the interactions at different points within ecosystems.

Based on this research, the following are recommendations for improving the delivery of information to key populations in the future.

2. PRIORITIZE TV, MOBILES, AND DVD/VCDs IN URBAN AREAS

With 83% of urban residents in Mon State owning a TV in their home and 54% of urban residents possessing a mobile phone in the home, the ability to communicate and spread information via these media in urban areas has risen greatly in recent years. Urban dwellers watch TV frequently, with 48% of urban TV watchers having watched TV the previous day and three-quarters within the past week. Because 85% of urban respondents own a DVD/VCD player in their home, information distributed via DVD/VCDs could also have wide reach in urban areas. While less prevalent than TV, radios are still important in urban areas and are owned by 61% of urban respondents, despite decreasing usage compared to TV in recent years.

3. IN RURAL AREAS, PRIORITIZE RADIO, TV, AND SIMPLE MESSAGES TAILORED FOR DISTRIBUTION BY WORD OF MOUTH

In rural areas where 62% of respondents own TVs and 61% own a radio in the home (46% and 48% in former conflict areas, respectively), both media will be important for getting information out. However, because electricity supply is frequently irregular, radios are overall the most dependable and immediate means to distribute information. Because of the limited direct reach of TV and radio, however, many individuals in rural and former conflict areas will hear news second-hand by way of a trusted interpersonal source such as a family member, friend, or local village elder or authority. As a result, to maximize the clarity and reach of information, messages should be tailored to be easily remembered and spread by word of mouth.

4. USE THE MOST RECOGNIZED AND TRUSTED MEDIA TO MAXIMIZE REACH

In Mon State, government-owned media outlets Nay Pyi Daw Myanmar Radio National Service (Nay Pyi Daw Myanma Ah-Than) and MRTV are overwhelmingly the most recognized, widely distributed, and most trusted media sources among TV and radio users. For each station, 100% of radio or TV users knew of the station, with 98% having used it. Use of these two stations by Myanmar authorities or by any other communication agencies will be critical for reaching the widest possible audience.

It should be noted, however, that it is important to communicate the same message via a combination of sources. Many in Mon State frequently cross-check sources to evaluate the trustworthiness of the information they have heard. Additionally, respondents reported that the top go-to sources they checked after hearing of a major event were: friends or family, Myanmar Radio National Service, MRTV, then Shwe FM (10%).

Because of lack of trust in any one news source, delivery of critical information in an emergency must be made through multiple media channels and medians.

5. USE PHOTO AND VIDEO TO SUPPORT THE CREDIBILITY OF NEWS AND INFORMATION

Among a public still skeptical of the full accuracy of any single source, there is demand for news and information content delivered with video and photographic visuals. The inclusion of photo and video visuals to support the trustworthiness of news and information—whether related to a health campaign, a warning against an impending major storm, or critical information in the midst of an emergency—will continue to be of high importance to information consumers in Mon State.

ABBREVIATIONS AND GLOSSARY

BBC	British Broadcasting Corporation
BBG	Broadcasting Board of Governors
CCTV	China Central Television
DVB	Democratic Voice of Burma
DVD	Digital Versatile Disc
IDPs	Internally Displaced Persons
INMA	Independent Mon News Agency
MNLA	Mon National Liberation Army
MPF	Mon People's Front
MPT	Myanmar Posts and Telecommunications
MRTV	Myanmar Radio and Television
NLD	National League for Democracy
NMSP	New Mon State Party
PSRD	Press Scrutiny and Registration Division
RFA	Radio Free Asia
RFA-TV	Radio Free Asia TV
VCD	Video Compact Disc
VOA	Voice of America
VOA-TV	Voice of America TV
WEF	World Economic Forum

Broadcasting Board of Governors (BBG): the independent federal agency that oversees all U.S. civilian international media.

Democratic Voice of Burma: Non-profit media organization established by Burmese expatriates in 1992 broadcasting uncensored news and information via shortwave. In 2005 this was expanded to satellite television.

Guiding Star: Mon language publication produced monthly by INMA. Guiding Star was given temporary authorization to publish inside Myanmar in February 2013.

Independent Mon News Agency: established by former Mon students, youths and democracy activists based in Mon State in 1999. Based in Thailand, IMNA covers news especially related to Mon communities in Thailand and Myanmar. Distribution is via print, radio and Internet.

Irrawaddy: a newsmagazine published by the Irrawaddy Publishing Group (IPG), founded in 1992 by Burmese exiles living in Thailand.

Myanmar Radio and Television: Formerly Burma Broadcasting Service (BBS), an umbrella organization for state run radio and television in Myanmar.

Mizzima News: a Burmese multimedia news organization. It was established in August 1998 by a group of Burmese journalists in exile. The International Press Institute awarded Mizzima News its Free Media Pioneer award in 2007.

Nay Pyi Daw Myanmar Radio National Services: Formerly Burma Broadcasting Service (BBS), the national radio service of Myanmar. The service runs Myanmar Radio and Myanmar Radio Minorities Service.

Ooredoo: A Qatari international telecommunications company awarded a 15-year contract for telecom development in Myanmar in June 2013.

Paduk Myay: Government owned FM radio station.

Radio Free Asia: Radio Free Asia (RFA) is a private, non-profit news organization operating under a grant from the BBG. Broadcasting daily in nine languages to listeners in Asia whose governments restrict media.

RedLink Communications: Private company owned by the sons of the former military junta's number three. RedLink was second to be licensed in Myanmar to provide WiMAX broadband in Myanmar.

Shwe FM: Private FM radio station.

Sky Net MPS (Multiplay Service): Owned by Shwe Tan Lwin Media Ltd. – Shwe Tan is a close ally of President Thein Sein. Sky Net MPS provides television, broadband Internet and Voice over IP services across Myanmar.

Telenor: Telenor Group from Norway is an international provider of tele, data and media communication services. In June 2013 Telenor was awarded one of two 15-year contracts for telecom development in Myanmar.

Than Lwin Times: Small Mon language newspaper produced 2011-2012 by associates of the NMSP.

Voice of America: Voice of America produces popular news, information and cultural programs in 45 languages and reaches more than 164 million people around the world every week on television, radio, web and mobile platforms.

Yatanarpon Teleport: State owned company primarily engaged in offering internet services including dial-up, broadband, wireless and WiMAX services.

TIMELINE 2012-2014¹⁴

- **2012 JANUARY**
Government signs ceasefire with rebels of Karen ethnic group.
- **2012 APRIL**
NLD candidates sweep the board in parliamentary by-elections, with Aung San Suu Kyi elected. The European Union suspends all non-military sanctions against Burma for a year. EU foreign policy chief **Catherine Ashton**, British Prime Minister **David Cameron** and UN Secretary-General **Ban Ki-moon** visit for talks on moving the democracy process forwards.
- **2012 MAY**
Manmohan Singh pays first official visit by an Indian prime minister since 1987. He signs 12 agreements to strengthen trade and diplomatic ties, specifically providing for border area development and an Indian credit line.
- **2012 AUGUST**
President **Thein Sein** sets up commission to investigate violence between Rakhine Buddhists and Rohingya Muslims in the west of the country. Dozens have died and thousands of people have been displaced
- Burma abolishes pre-publication censorship, meaning that reporters no longer have to submit their copy to state censors. In a major cabinet reshuffle President Thein Sein replaces hardline Information Minister **Kyaw Hsan** with moderate **Aung Kyi**, the military's negotiator with opposition leader **Aung San Suu Kyi**.
- **2012 SEPTEMBER**
Moe Thee Zun, the leader of student protests in 1988, returns from exile after Burma removed 2,082 people from its blacklist.
- President **Thein Sein** tells the BBC he would accept opposition leader **Aung San Suu Kyi** as president if she is elected.
- **2012 NOVEMBER**
Visiting European Commission chief **Jose Manuel Barroso** offers Burma more than \$100m in development aid.
- Around 90 people are killed in a renewed bout of communal violence between Rakhine Buddhists and Rohingya Muslims
- US President **Barack Obama** visits to offer "the hand of friendship" in return for more reforms. He urges reconciliation with the Rohingya minority.
- **2013 JANUARY-FEBRUARY**
The Burmese army launches an attack that surrounds Laiza, the biggest town controlled by Kachin rebels near the Chinese border, breaking a short-lived government ceasefire. The government and rebels reach agreement to disengage and begin political dialogue after Chinese-sponsored talks in the southern Chinese town of Ruili.
- **2013 MARCH**
Rioting between Muslims and Buddhists in Meiktila, south of Mandalay, leaves at least ten people dead and several mosques burned down.
- **2013 APRIL**
Four private daily newspapers appear for the first time in almost 50 years as the state monopoly ends, in line with the August 2012 abolition of pre-publication censorship.
- **2013 MAY**
President **Thein Sein** visits Washington. President Obama praises political and economic progress, but criticizes violence against Rohingya Muslims. The visit coincides with six Muslims being jailed over the Meiktila clashes in March, whereas no Buddhists have been convicted.
- **2013 JULY**
President Thein Sein visits Britain, announces that Burma will release all political prisoners "by the end of the year."
- **2014 APRIL**
At least 22 people are killed in fighting between government troops and ethnic Kachin rebels in the north.
- Thousands attend the funeral of veteran democracy campaigner Win Tin.
- **2014 MAY**
US extends some sanctions for another year, saying that despite the recent reforms, rights abuses and army influence on politics and the economy persist.

14 MYANMAR PROFILE: A CHRONOLOGY OF KEY EVENTS," BBC, <http://www.bbc.com/news/world-asia-pacific-12992883>, (MAY 16, 2014).

APPENDIX 1: RESEARCH DESIGN

RESEARCH OBJECTIVES

The objective of this study was to uncover the ways in which information circulates in Mon State and the dynamics that comprise its unique information ecosystem. The study sought to explore and document the status of media use and the ways in which news and information available in Mon State is received, evaluated, trusted, and shared.

The research centered around three key research themes:

- ▶ Theme 1: Use of New Media & Technology
- ▶ Theme 2: Information Flows
- ▶ Theme 3: Understanding Trust & Influence

The study sought to pilot this research in Mon State, with the intent to expand the research to Myanmar’s six remaining ethnic states in the future—into Chin, Kachin, Kayah (Karenni), Kayin (Karen), Rakhine (Arakan), and Shan.

METHODOLOGY AND APPROACH

Research for the study took place in Mon State between December 2012 and January 2013. The study combined quantitative and qualitative research, including household surveys, key informant interviews, and focus group discussions. In-country research was carried out through the services of field contractor Myanmar Survey Research (MSR).

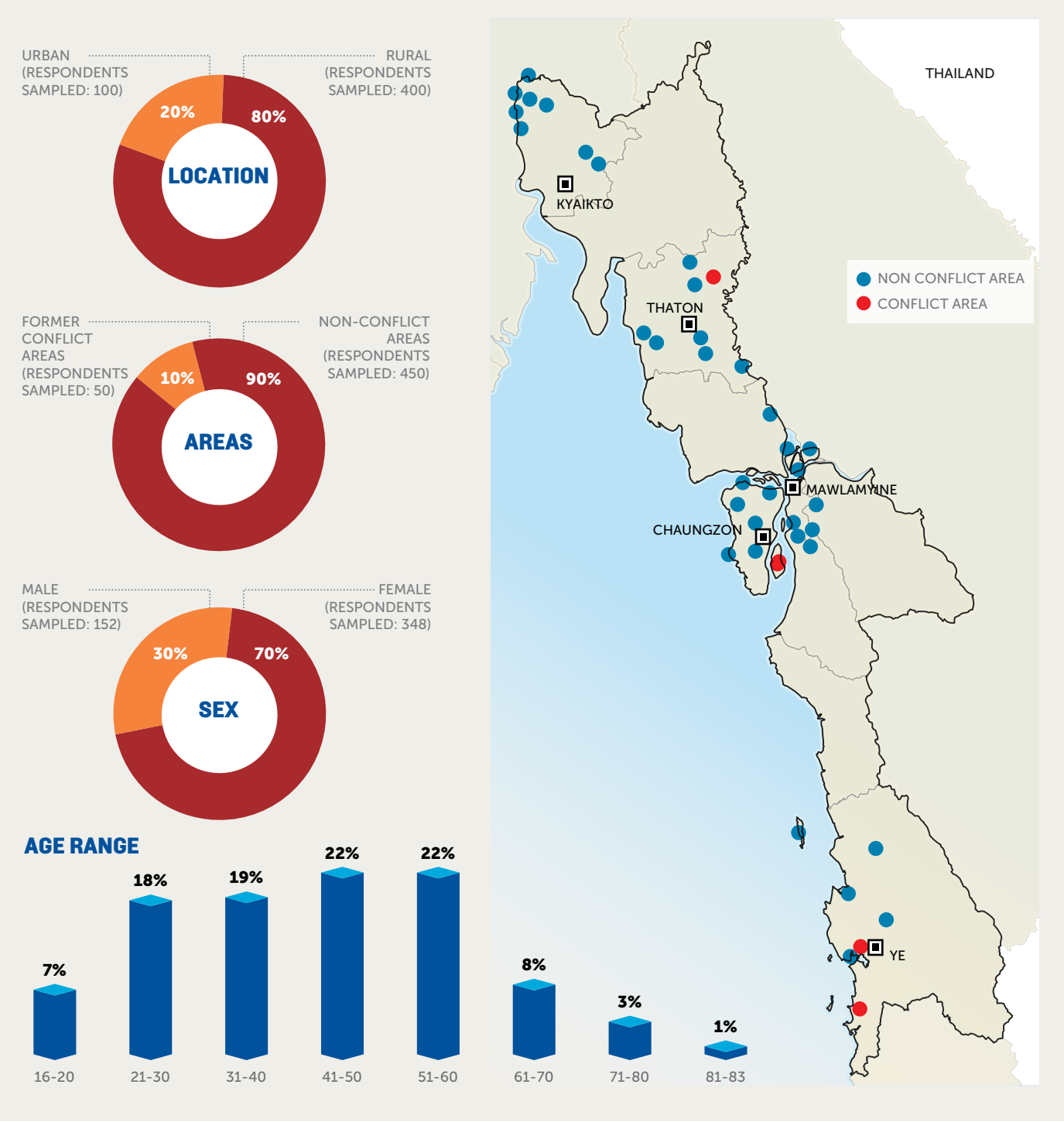
A household survey sample size of 500 was selected to allow for statistical estimates for Mon State as a whole with a 95% confidence interval and margin of error of ±6.3%. Five out of Mon State’s 10 townships were

selected for the study by probability-proportional-to-size (PPS) sampling. Both non-conflict areas and former conflict areas were selected. The townships selected for the study are presented below in Figure 1.

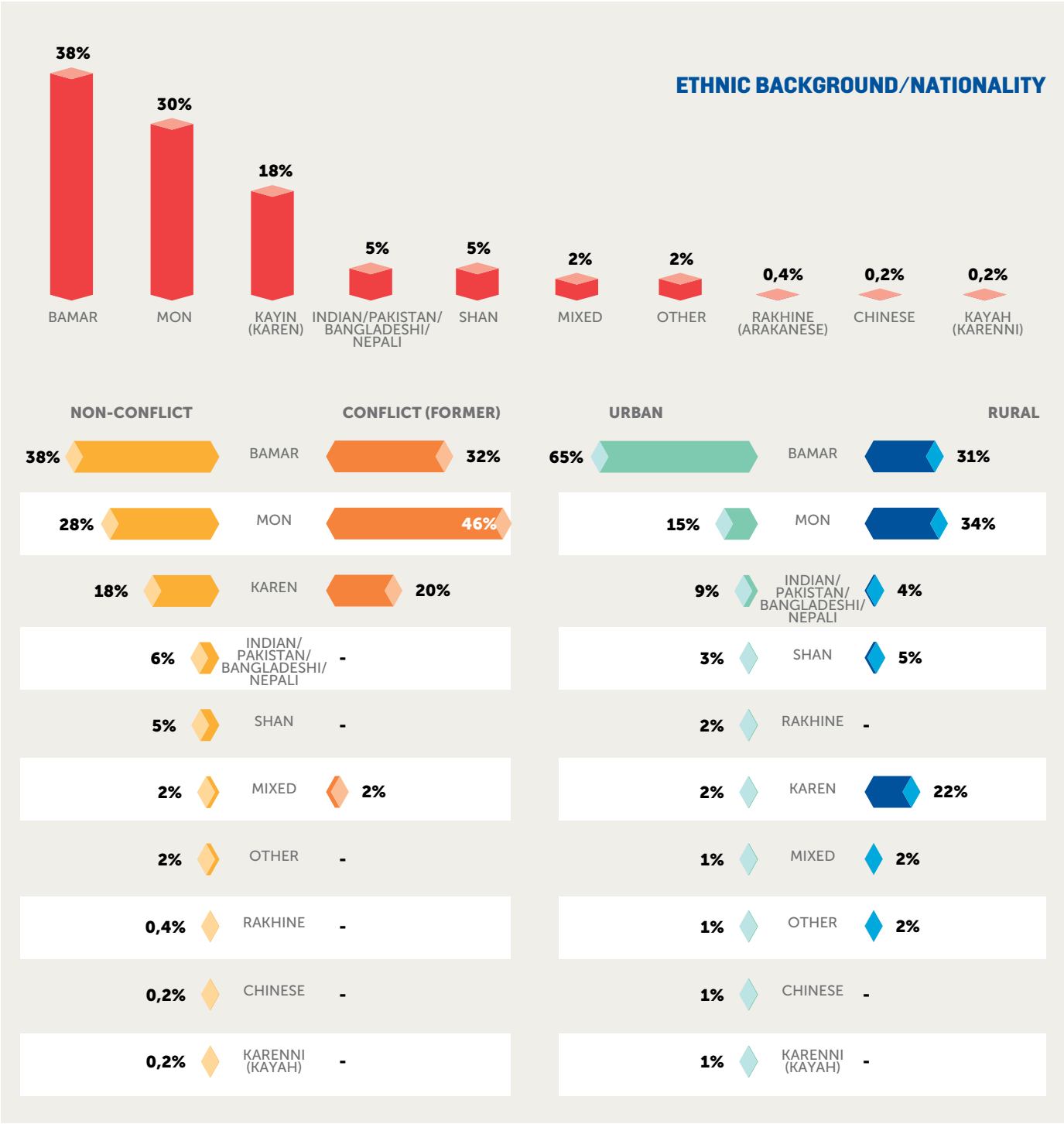
FIELD RESEARCH SUMMARY			
Field dates		December 16, 2012 to January 5, 2013	
Sampling	Household survey	500 respondents (Urban = 100, Rural = 400) (Non-conflict = 450, Former conflict = 50)	
	Focus Group Discussions (12)	Non-conflict area (8) Former conflict/ceasefire area (4)	
	Key Informant Interviews (24)	Non-conflict area (16) Former conflict/ceasefire area (8)	
	Ethnographic Observation (12)	12 locations	

Within each township, two urban wards and eight rural villages were selected by simple random sampling. A total of 10 wards and 40 villages were selected. Within each sample point, households were selected randomly based on a set interval from rotating community starting points, such as a school, market, or temple. Once a household was selected, respondents were selected through the use of a Kish Grid.

FIGURE 1: SAMPLE LOCATIONS			
Township	Number of Wards	Number of Villages	Total Sample Points
Mawlamyine	2	8	10
Chaungzon	2	8	10
Kyaikhto	2	8	10
Thaton	2	8	10
Ye	2	8	10
Total	10	40	50



APPENDIX 1: RESEARCH DESIGN



ABOUT INTERNEWS CENTER FOR INNOVATION & LEARNING

Building on the breadth and depth of Internews’ activities and experience accumulated over 30 years of promoting independent media in more than 80 countries around the world, the Internews Center for Innovation & Learning supports, captures, and shares innovative approaches to communication through creative research and development worldwide.

Founded in 2011, the Center strives to balance local expertise and global learning in support of our vision that healthy information ecosystems are a root solution to furthering human progress. The Center serves as an open knowledge hub that develops and inspires collaborative investigation and experimentation.

Through a rigorous, iterative process of pilots and experimental research, the Center seeks to contribute information and tools to better understand the changing worlds of information and communications.

In the Center, we strive to deepen and enhance the links between existing expertise in media and the increasingly diverse information worlds and research that can help address the challenges of today’s dynamic information ecosystems be they global, hyper local or somewhere between.

This is far from a purely academic endeavor. Internews hopes that the Center’s activities will engage and benefit both those who work at the front lines of global development and the communities they serve.

www.innovation.internews.org

ABOUT THIS REPORT

This report has been designed for multiple audiences. Part One – Research Findings presents key data and analysis from this extensive study. Part Two – Additional Data Analysis (available at www.innovation.internews.org) provides a broader data analysis for those audiences who are interested to explore the nuances of this research further.

COVER PHOTO

Listening to radio while reading a journal
– Moke Ka Maw Village Mon State

GRAPHIC DESIGN | INFOGRAPHICS

VROS Design | Visual Thinking Comunicación



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