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缅甸蓝皮书

BLUE BOOK OF MYANMAR

缅甸国情报告

(2015)

主编 / 李晨阳

副主编 / 邹春萌

ANNUAL REPORT ON MYANMAR'S

NATIONAL SITUATION (2015)

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摘要

云南大学缅甸研究院（原为缅甸研究中心）自2012年以来，连续三年负责缅甸蓝皮书的编撰工作。作为国内最具影响力的缅甸研究学术机构，我们有责任和义务做好这件事情，以此向关心和关注缅甸形势发展的社会各界提供最前沿、最权威的资讯信息和研究成果。本年度的发展报告——《缅甸国情报告2015》是缅甸蓝皮书之三，按惯例，本报告仍分三部分展开。

第一部分是总报告。该报告综述2013年4月1日至2014年3月31日的缅甸形势。本年度的缅甸形势相对平稳，政治经济转型沿着既定方向持续深入，在政治、经济、外交等诸领域均有所进展。欧盟解除对缅经济制裁，给予缅甸普惠制待遇；缅甸总统吴登盛率团对美国进行了访问；成功举办了第27届东南亚运动会；缅甸接任2014年东盟轮值主席国。在国内方面，缅甸政府在政治改革、经济对外开放等领域都颇有建树。政治改革有序推进，加速私有化进程、加快经济体制改革等举措使得缅甸经济发展显现活力，国内和平进程在曲折中前进。本年度缅甸国家发展在取得巨大进步的同时，也出现了一些新的问题。不时恶化的国内民族宗教冲突让当局承受了巨大压力。为了抢占2015年大选的有利位置，缅甸国内各政治力量围绕修宪等问题展开了激烈的政治博弈。

第二部分是分报告。本年度的分报告继承了往年的风格。在报告编撰过程中，我们兼顾信息和内容的全面性和及时性，也力图体现我们对相关问题的学术思考。分报告大致按照政治、经济、外交的顺序具体介绍了缅甸本年度的国家发展形势。此外，还收录了一些同本年度缅甸发展密切相关的学术论文和研究报告。

在政治方面，本报告收录了有关缅甸各派围绕修宪问题的博弈、对缅甸



改革前景的分析以及缅甸国内智库的发展现状等论文。随着 2015 年大选的日益临近,缅甸国内各派政治势力的斗争日益激烈。由于修宪问题直接关系到昂山素季能否参选总统以及民盟是否会抵制 2015 年大选,因此修宪问题成为本年度缅甸政治领域的焦点问题。宋清润的论文《缅甸各派政治力量围绕修改 2008 年宪法的斗争》从修宪的背景与缘由、主要政治力量在修宪问题上的斗争、对修宪发展前景的预估三方面系统地分析了缅甸修宪问题的实质内涵,并对其发展趋势做出了科学合理的分析预测。对于缅甸政治改革及其未来前景,近年来国内外学术界都做了大量的分析和研究,吴哥哥莱的文章《缅甸改革:现状及前景》给出了来自缅方的最权威阐释。作为缅甸总统的首席政治顾问,吴哥哥莱全程参与了缅甸政治转型进程中一系列重大改革措施的制定和出台,他的文章对缅甸政治转型进行了全面系统的介绍,对于我们了解缅甸政治转型的发生和发展过程,准确研判未来发展方向都具有巨大的参考价值。缅甸国内智库真正得到学术界关注是在缅甸政治转型以后,当前缅甸国内智库发展呈现百花齐放的态势。张添的论文《缅甸智库的兴起及其活动》对缅甸各主要智库的管理模式、代表人物、成果形式等方面进行了全面的考察,并深入分析了缅甸智库发展存在的问题及其对中缅关系的影响。

在经济方面,本报告只收入了一篇文章,即邹春萌、薛翥跃、许清媛三位学者共同撰写的《2013 ~ 2014 财年缅甸经济改革与经济发展》。文中指出,缅甸 2013 ~ 2014 财年缅甸政府仍旧把创造就业和改善民生摆在优先位置,持续加大对国内中小企业的扶持力度和经济领域的透明度,进一步改革税制和金融。通过一系列改革举措,缅甸经济发展取得了不错的成效。GDP 继续保持较快增长,农业、油气、电力、通信与旅游等主要产业均获得不同程度的发展,外资和外贸都较 2012 ~ 2013 财年有显著增加。对于 2014 ~ 2015 财年缅甸经济走势,文章认为只要缅甸能在政治、社会方面维持稳定局面,缅甸经济仍将保持较快的发展势头。

在外交方面,本报告收录了三篇文章。2015 年是缅甸外交取得丰硕成果的一年。近年来,缅甸在政治、经济、社会等方面都取得了长足进步,改

革成就得到了国际社会的广泛认可。东盟国家对缅甸近年来的发展进步给予了充分肯定,美国及欧盟国家对缅甸进一步放松了制裁,缅甸的外交环境得到了极大改善。此外,中缅关系在本年度也逐渐走出缅甸转型之初的动荡,开始重新企稳。李晨阳和宋少军共同撰写的《2013~2014 年度的缅甸外交》一文,围绕本年度缅甸外交的新变化和新特点,对本年度的缅甸外交形势进行了全面的论述。文章认为,本年度缅甸外交形势的发展延续了转型以来的良好势头,缅甸重点加强了同周边国家的友好往来,改善了同西方主要国家和国际组织的关系。随着缅甸政治转型不断推进,越来越多的西方国家和国际组织解除了对缅制裁,良好的外交形势将为缅甸的发展创造良好的外部环境。宋清润的论文《2014 年的中缅关系:热络中存隐忧》将关注点聚焦到 2014 年的中缅关系上,对中缅关系发展的成绩给予了充分肯定,但是对于缅北复杂的局势以及缅甸民间对中国的认知有恶化的倾向等问题,认为应该给予充分重视,并在恰当时机采取有效的应对措施妥善解决。王子昌的《东盟轮值主席国与 2014 年的缅甸外交》一文,从缅甸接任东盟轮值主席国以来充分利用这一平台发展本国外交的视角出发,认为缅甸通过将南海问题设置为东盟系列会议议题、掌控会后公报以及主席声明中的措辞,较好地平衡了东盟内部成员之间以及东盟和伙伴国之间的关系,通过成功举办系列会议、依法授予部分罗兴伽人公民权,让世界了解了缅甸新政府的行政能力和解决其人权问题的决心,达到了其作为东盟轮值主席国预设的加强东盟团结和增强东盟与伙伴国之间关系、展示政府能力与形象的外交期望。

第三部分是附录。这一部分收录了杨祥章、张荣美、张景璐等几位年轻学者翻译的国外著名学者和研究机构有关缅甸国内最新形势发展的文章和研究报告。第一篇是罗伯特·H. 泰勒的《战火又起,误解重重:缅甸当前的民族政治》,该文讨论了缅甸国内日益严重的民族和宗教冲突问题,认为这一趋势如果得不到扭转,将严重影响未来缅甸的政治民主化转型。第二篇是荷兰跨国研究所缅甸研究中心撰写的《缅甸的政治改革与民族和解——必要的澄清及成效》研究报告,报告肯定了吴登盛政府执政以来取得的成绩,认为在大选前缅甸面临的主要问题是将政治改革与民族和解统一起来,政治



改革必须照顾到国内少数民族的利益才能实现进一步发展。第三篇是马特·尼尔森和斯坦·托尼森共同撰写的《缅甸大选中的高风险暴力》，全文关注的是2015年大选中面临的高风险挑战，文中从军方、民地武、少数民族和宗教冲突、民盟同巩发党的关系等大选中的主要变量因素出发，对缅甸大选中高风险的暴力因素进行了全面的分析，并根据作者的判断给出了短期和长期的政策建议。第四篇是《“缅甸之春”带来的艰难选择》，文章全面分析了未来缅甸政治发展将面临的主要挑战，并针对未来缅甸转型发展的路径选择，结合政治转型理论的分析，提出了作者的意见和看法。

每年缅甸国情报告的编撰过程，也是我们对上一年度缅甸发展形势进行全面回顾的过程。总的来说，2013~2014年度是缅甸在转型后国家各方面都大跨步前进的一年。无论是在国内政治经济领域持续推进改革，还是在外交上同西方国家基本实现了关系正常化，都体现了这一特点。此外，在学术研究领域，随着缅甸转型进程的深入，国际学术界普遍加强了对缅甸的研究工作。横向比较可以看出差距，目前中国的缅甸研究虽取得了一些进展和成绩，但总的来说，同西方主要国家甚至近邻日本等国相比，仍然显得薄弱。未来缅甸形势将如何发展，需要我们集中力量进一步加强对缅甸的研究，不断增强对缅甸国内外形势变化的研判能力。

Abstract

Since its establishment in 2012, this is the third year for the Center for Myanmar Studies of Yunnan University to responsible for the annual report on Myanmar's national situation. As the most influential domestic academic institution for Myanmar study, we have the obligation to provide the most frontier and authoritative research results for those concerning situations in Myanmar. *The Annual Report on Myanmar's National Situation (2013 – 2014)*, which includes three parts, is the second one of the series of reports on Myanmar.

Part I is the General Report. Myanmar's development went smoothly in 2014, with the political and economic transformations have been put forward in the predetermined direction and progresses have been made in all of the political, economic and diplomatic fields. A series of significant events have taken place. EU replaced its economic sanctions on Myanmar with MFN status; President U Thein Sein made a historic visit to the US; Myanmar hosted the 27th Southeast Asian Games successfully as the chair of ASEAN in 2014. For domestic affairs, Myanmar made efforts to promote political reform, demotic peace process goes forward in twists and turns. The speeding up of privatization and economic restructuring has brought vitality to Myanmar's economics. While made great progresses, Myanmar has also faces some new problems. The Myanmar Government suffered great pressures from ethnic and religious conflicts. In order to seize a favorable position in 2015 election, Myanmar's domestic political forces rived with each other openly and secretly on issues like constitutional amendment.

Part II is Topical Reports, which is of the same style as the annual reports for the past years. We try to take into consideration the comprehensiveness and timeliness while show our academic thoughts on relevant issues. This part introduces Myanmar's politics, economics and diplomacy in 2014. There are several research papers closely related to Myanmar's development. For politics,



there are three papers relevant to conflicts on constitutional amendment, the development of Myanmar's think tanks as well as reform prospects. The constitutional amendment is a focus issue, as it directly concerns whether Aung San Suu Kyi can run for presidency and NLD will boycott the 2015 election or not. In *Rival on the Amendment of the 2008 Constitution among Myanmar Political Forces and the Development Tendency*, Song Qingrun analyzes the essence of the constitutional amendment and makes reasonable forecast about its development tendency. Domestic and foreign scholars have done lots of analysis and researches on Myanmar's political reform in recent years. In *Myanmar's Reform: Current Situation and Future Prospect*, U Ko Ko Hlaing shares his understanding. As the senior advisor of President U Thein Sein, U Ko Ko Hlaing has participated throughout the formulate of major reform measures in Myanmar's political transition. He makes a comprehensive introduction of Myanmar's political transition, which is helpful for us to understand the occurrence and development process of Myanmar's political transition, as well as make accurate judgments on its future development. Due to their important role in Myanmar's political transition, Chinese scholars started to pay attention to Myanmar's think tanks, which are developing rapidly. Based on studies on the management modes, representatives and achievements of Myanmar's major think tanks, Zhang Tian makes in-depth analysis on problems facing the development of Myanmar's think tanks and their influences on China - Myanmar relations In *The Rise and Activities of Myanmar's Think Tanks*.

Myanmar's Economic Reform and Development in Fiscal Year 2013 - 2014, which is jointly written by Zou Chunmeng, Xue Xiyue and Xu Qingyuan, is the sole paper focusing on Myanmar's economics. It points out that creating job opportunity and improving people's livelihood are still the priorities. Myanmar Government made more efforts to support domestic SMEs, improve economic transparency and reform tax and finance systems. Myanmar's economic development yielded decent results through a series of reforms. GDP continued to maintain a rapid growth, major industries like agriculture, oil and gas, electricity, telecommunications and tourism gained development in varies degree, and foreign investment and trade increased significantly compared with the previous fiscal year. The authors believe, Myanmar can maintain rapid economic development as long

as it keeps political and social stability.

There are three papers focus on Myanmar's diplomacy in part II. Myanmar's diplomacy made great achievements in 2014. The reform over the past more than two years brought Myanmar considerable progresses in politics, economics and society, which has been widely recognized by the international community. ASEAN highly appreciates Myanmar's development in recent years. Myanmar's relations with the US and EU improved greatly after they further lifted sanctions on Myanmar. In addition, China – Myanmar relations gradually got over the adverse impacts of Myanmar's transition and began to re-stable. In *Myanmar's Diplomacy in 2013 – 2014*, Li Chenyang and Song Shaojun make comprehensive overviews on Myanmar's diplomacy, especial its new changes and characteristics. It points out that Myanmar's diplomacy maintain a good momentum this year. Myanmar strengthened its friendly exchanges with neighboring countries and improved relations with major Western countries and international organizations. With the advancement of Myanmar's political transition, more and more Western countries and international organizations will lift their sanctions, which will create a favorable external environment for Myanmar's development. In *China – Myanmar Relations in 2014: Intimacy and Hidden Worries*, Song Qingrun fully affirms the development of China – Myanmar relations. Meanwhile, he believes China should take effective measures to address the problems of Northern Myanmar situation and the deterioration of China's image among Myanmar civilian. According to the opinion of Wang ZiChang in *ASEAN Chair and Myanmar Diplomacy*, Myanmar takes ASEAN chair as a diplomatic platform. By listing the South China Sea issue as a topic in ASEAN Summit and publishing the Summit communiqué and the Chairman's Statement, Myanmar successfully balanced the relations among ASEAN nations and the relations between ASEAN and its partner countries. The successful holding of several significant conferences and granting some Rohingya citizenship shows the international community Myanmar's administrative capacity and determination to solve human rights issue. As the ASEAN chair, Myanmar achieves its objectives of enhancing ASEAN unity and ASEAN's relations with partner countries, demonstrating Myanmar Government's ability and improving international image.

Part III is Appendix, which collects papers and reports translated by young scholars



Yang Xiangzhang, Zhang Rongmei and Zhang Jinglu. All those papers and reports in this part are research results of famous Western scholars and institutions on the newly situation in Myanmar. In *Refighting Old Battles, Compounding Misconceptions: The Politics of Ethnicity in Myanmar Today*, which focuses on the increasing serious ethnic and religious conflicts, Robert H. Taylor points out that the development of Myanmar's political democratization will be heavily impacted if such situation couldn't be reversed. The report *Political Reform and Ethnic Peace in Burma/Myanmar: The Need for Clarity and Achievement* by TNI-BCN highly appreciates the achievements of Myanmar's new government led by U Thein Sein. It holds the opinion that it's of great importance for Myanmar to connect political reform with national reconciliation, as political reform only can achieve its objectives when the interests of minority groups have been taken into consideration. *High Risk of Electoral Violence in Myanmar*, which is jointly written by Marte Nilsen and Stein Tønnesson focuses on high risks of the 2015 election. It gives short-term and long-term recommendations based on comprehensive analysis on high risk factors, such as divergence between the military and armed ethnic minorities, religious conflict and relations between NLD and USDP. *Hard Choices Posed by the "Myanmar Spring"* explores major challenges facing Myanmar's political development. By analyzing theory of political transition, the author shares the opinion on choices for Myanmar's transition in the future.

The process of preparing the annual report is also the process for us to make comprehensive analysis and summary on Myanmar's development. Overall, Myanmar took big steps forward in all aspects, which has been demonstrated by the continued political and economic reforms as well as the normalization of diplomatic relations with Western countries. Additionally, the international academia has strengthened researches on Myanmar. Although have made progresses and achievements, China's studies on Myanmar are weaker compared with those of major Western countries or even our neighbor Japan. We have to strengthen studies on Myanmar and enhance judgment capacity on the development of Myanmar's situation.

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