Myanmar’s energy sector continues to develop. The installed energy capacities available have increased from 980 MW (2000) to 3,735 MW (2013); of these 2,780 MW (66.9%) are produced using hydropower, 996 MW (29.5%) from natural gas and 120 MW (3.2%) from coal (Hennig 2016: 1234-1235). However, despite expanding production in the natural gas sector, mostly based on foreign investment, only a very small proportion is used for domestic energy supplies due to existing export obligations. From 2000 to 2013 electricity consumption in Myanmar increased threefold to 10,112 GWh, but the country remains nonetheless among those with the lowest per-capita energy consumption in the world: 165 kWh (Hennig 2016: 1235).

The areas with the best energy supplies are Nay Pyi Taw, Yangon and Mandalay, followed by a few regional centres. The supply to several regions on the border to China (in the north and east of Shan State and Kachin State) is also relatively good, as cross-border trade and concessions for the extraction of raw materials provide higher incomes and better infrastructure in the locality. However, in the majority of the country less than half and often only a quarter of households have access to electricity. The peripheral mountain areas of Rakhine State, Tanintharyi Region and parts of Kachin State are characterised by poor energy supplies with less than 5% of all households having access to electricity, for instance for lighting. Energy supplies in Chin State are not quite as poor, a situation that can be attributed to external support provided by charitable organisations, civil society initiatives and available remittances. Also, energy is at some locations delivered across the border from India.

Thirty hydropower plants are currently in existence, 29 of them with a capacity of less than 10 MW; 17 are multipurpose dams that store water for irrigation as well as for electricity production and also help control flooding (ADB 2013). Three of the 15 largest hydropower plants were erected before 2000. These include the Baluchaung-2-Project, built in 1960 and financed by post-war Japanese reparations, which supplies electricity primarily to Yangon and Mandalay. Other large-scale projects, including the Kinda Multipurpose Dam and Yeywa, supply Mandalay and Nay Pyi Taw (Hennig 2016: 1237).

Estimates suggest that it would be possible to develop 302 potential hydropower locations with a total capacity of up to 46.3 GW in Myanmar (Hennig 2016: 1236). The controversial large-scale project of the Myitsone Dam at the confluence of N’Mai Hka and Mali Hka with the Ayeyarwady River was suspended by the Thein Sein government in 2011 due to strong public reservations (Sun 2012, Simpson 2013, Kirchherr/Charles/Walton 2016, Kirchherr et al. 2017). A number of other projects, proposed mostly by China but also by India and Thailand – for instance Nawchanka and Shweli or Tamanthi, Shwesyay and Mawlight on the Chindwin – largely or wholly for the export of energy to China and India, were in 2013 also suspended (Hennig 2016: 1237-1238, Kirchherr/Charles/Walton 2016, Mizuno 2016, each with lists of possible future projects). There has to date been no comprehensive, independent re-evaluation of planned projects that assesses ecological, economic, social and political factors.

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