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Rakhine State Policies: Considerations for the New State Government

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This discussion paper was written by David Dapice (David_Dapice@harvard.edu) following a trip to the region in January 2016 and subsequent research. *The views expressed herein are the author's alone and do not necessarily reflect those of Proximity, the Government of the Union of Myanmar, or Harvard University.* This study, along with other recent Ash-Proximity reports on Myanmar, is posted at <http://ash.harvard.edu/journal-articles>

Executive Summary

Rakhine State has recently become the poorest state in Myanmar, surpassing even Chin State. This is due largely to the religious conflict which has created large and isolated camps of Muslim internally displaced people. The conflict has also kept most of the remaining one million Muslims confined to their townships. Historic problems with state neglect and low investment have also led to very large outflows of younger workers of all religions.

A new Myanmar government has a chance to reverse these dismal trends. The following suggestions can help turn the situation around:

1. The release of the 2014 national census by religion shows that the share of Muslims in the population has changed little since 1882. (See graph in Appendix B). This can dispel arguments that some combination of migration, conversion and excess fertility by Muslims is endangering Buddhism, which remains close to 90% of the population. Publicizing this clearly would further weaken extreme religious groups who present arguments not based on facts.
2. Allow Muslims to move around for work within Rakhine State after they have been vetted by their local community and government officials. Residence permits, different from citizenship, could be issued for security purposes.
3. As labor mobility increases and income-earning opportunities grow within the state, the camps can be closed. Muslims should be allowed back into their former homes or helped to resettle in other places if they feel unsafe where they had lived.
4. Distribute improved seed for paddy and other varieties of crops and implement small-scale irrigation projects in the short term to promote dry season cropping. This will increase returns to both land and labor while increasing income-earning opportunities.
5. Continue to invest in extending the electricity grid, roads and appropriate ports to lower transport costs.
6. Develop banking facilities in the state, which are now inadequate, and experiment with different forms of finance acceptable to all groups.
7. If Kyauk Phyu port is further developed, it should be started modestly and with local control. It is unlikely that current proposed plans with Chinese company investment are economically viable.

These changes would allow for increased output, reduced poverty, and increase the chances of economic and perhaps – later – social cooperation among the various groups in Rakhine State.

Background

Rakhine State is best known for violent religious conflict in the past several years. These conflicts have resulted in about 150,000 Muslims living in camps and the majority of the state's remaining one million Muslims severely constrained in their movements. This has created a labor shortage which, along with other natural and infrastructure obstacles, has resulted in economic difficulties. Rakhine is now reportedly the worst off state in terms of poverty or per capita income. In Maungdaw Township, which is heavily Muslim, one NGO reported that malnutrition rates were among the worst in the world. The government has to deal with this situation, possibly with constrained resources. Meanwhile, the threat of continuing violence has meant that very large numbers of army, border guard and police units are stationed throughout the state, often occupying land that had been owned by farmers. The result is the displacement of many thousands of both Buddhist and Muslim farmers.

Behind this recent history is a longer-term aspect of Myanmar's history. Professor J.S. Furnivall, the co-founder of the Burma Research Society in 1906 and married to a Burmese, was the foremost scholar writing on Burma in the first half of the twentieth century. He argued that colonialism had destroyed Myanmar's traditional social structure and in its place created a "plural society" where quite different cultures lived side by side, but with no real social relations except through economic specialization. He argued that this was not sustainable and that a reorganization was needed in which the different groups came together to create genuine social and national unity. He famously wrote in An Introduction to the Political Economy of Burma in 1931, "If... the obstacles prove insurmountable, [it] can be only a matter of time and, after a period of anarchy more or less prolonged, our descendants may find Burma a province of China." He was not arguing, especially then, that China was aggressive but that it had an ancient culture that was coherent which would inevitably expand to fill a vacuum. This problem of the plural society is especially marked in Rakhine State where Buddhists and Muslims have lived side by side with limited trust. Today, China is even more unified and expansive than it was in 1931 and has announced a "one nation, two oceans" idea that is likely to have implications for Rakhine State.

The rise of militant Buddhism is partly encouraged by those seeking to undercut the NLD, but is also a deeply held belief of many in Myanmar. This false narrative is that Muslims are procreating and converting so as to create a Muslim majority in a Buddhist country. (The conversion of much of what is now Indonesia from Buddhism to Islam from the 13th to 16th centuries is often presented as evidence of a long running plot, even if history suggests the peaceful and slow, spontaneous expansion of Islam in that case.) Given that the 1881 Census of Burma had 4.5% Muslim inhabitants and the 2014 census a bit less, it is clear that these arguments do not apply to Burma or Myanmar in the last 130 years or even very much for shorter periods.¹

The lagging Rakhine economy is a long-term problem. Historically, neither roads nor electricity from the grid were very extensive in Rakhine State, thereby limiting economic opportunity. This led to extensive

¹ We had been told by experts associated with the 1983 Census that the percentage of Muslims had been understated due to the sensitivity of the issue. It is likely there has been little actual change in the share of Muslims in Myanmar in the last three decades.

outmigration of younger Rakhine (Buddhist) workers. One source estimated that a million young people have left. The outflow of Muslims is much less, perhaps 130-180 thousand people, as it requires an illegal sea journey involving much more risk and expense.² This loss of educated and even unskilled younger workers obviously limits the growth potential of the state.

Another aspect of the situation is the suspicion held by Rakhine Buddhists that some in the Muslim community want to self-identify as “Rohingya” so they can carve out a physical territory in Rakhine State and be recognized as an official ethnic group. Some Rakhine people believe that this “Rohingya” identification is used to garner support among external, foreign audiences but not in internal conversations, where the identity is Muslim and not Rohingya. It is difficult to know what is true, but these fears are part of the landscape and have to be considered. Ironically, many Rakhine persons favor allowing Muslims in the state to move more freely, both to facilitate labor movements within the state but also to lessen their numbers in Rakhine State – though some expressed fear that any “empty spaces” would only be filled by new Bangladeshi migrants who can easily enter through the porous northern border. Improved border security is possible but requires organization and efforts to limit corruption. It is unclear how many current Muslim residents would leave the state if allowed to, or how rapidly migrants might replace them. It is true that labor costs have risen in Rakhine State and male laborers now earn \$4 a day when work is available. However, real rural wages in Bangladesh have been increasing rapidly since 2008.³ V

The recent violent attacks by local Muslim extremists in northern Rakhine make a solution to this problem more urgent. Free movement within the state as in the past is now unlikely. However, review of individuals with input from both their local community and government officials to allow movement for labor within the state should be possible. Special residency cards could be issued to such people – not the same as citizenship. Simple repression without any moves to improve conditions will likely intensify resentments and may draw better armed elements in Bangladesh into the conflict. While safety and order are essential, so are steps to allow all people in Rakhine to earn a livelihood.

Some NGO representatives felt that past troubles had been fanned by “outside agitators” rather than local people, at least initially. They felt these agitators had semi-official support. It is hard to say if this is correct; however if it is indeed correct, then getting control of any such instigation will be necessary for future peace and to prevent escalation of violence.

Trip Observations

A Proximity-Harvard team visited Rakhine State during a trip to Myanmar from 1/20/2016 to 2/3/2016, the third such trip since 2014. The purpose of the trip was to survey economic prospects for the incoming

² Rakhine State Needs Assessment, September 2015, Center for Diversity and National Harmony, Yangon. The Rakhine migration figure is on p. 31 and the Muslim migration figure on p. 7, though that is a 2012 estimate and is now higher.

³ See “Rural Wages in Asia,” June 2015 by S. Wiggins and S. Keats. (<http://www.odi.org/publications/8747-rural-wages-asia>) This article shows a 50% real increase in rural wages in Bangladesh from 2005 to 2010. Factory wages have grown considerably since then. In 2014 a 77% minimum wage increase for women factory workers to \$67 was implemented and the lowest paid government job in 2015 paid \$103/month. Rural labor in northern Rakhine State can work only four months a year at \$4 a day. Men in Bangladesh normally earn 30-40% more than women, who in 2014 had been leaving urban for rural jobs as they paid better. Men have been attracted to migration to the Gulf and to urban jobs; rural poverty is dropping quickly in Bangladesh.

NLD government. Forming the state government has been a bit complicated since, unlike most states, more delegates in the state parliament were from the Arakan National Party (ANP) rather than from the NLD. The President has appointed a chief minister from the NLD who currently does not have the backing of the ANP.

The team visited Sittwe, Maungdaw and Kyauktaw townships. Maungdaw is largely a Muslim area and Kyauktaw mainly Buddhist. (Kyauk Phyu Township had been the focus of another recent visit of the team.) The team talked to a variety of people ranging from farmers and landless laborers to business men, rice millers and traders. Government and NGO representatives were also included. The discussions focused on agriculture; however issues of migration, labor supply and marketing were inevitably part of the conversations.

There was a huge need for improved rice seeds – a situation we also found in the Ayeyarwady Delta. We were told that the Ministry of Agriculture had focused on providing hybrid rice seed and that other seeds had been neglected. However, our research found that these seeds distributed by the Ministry were not appropriate for most farmers. Implementing a more varied seed distribution which includes other crops is partly a central and partly a state decision, but its implementation should have high payoffs. This applies to rice seed but also to secondary crops such as peanuts and pulses.

The second finding was that there was very little dry season farming being done with irrigation, even though there was large potential for it. Digging small ponds and dams (big enough for individual villages) and storing water from fresh water streams in the dry season would all allow much more productive second crops after monsoon paddy. These village structures would not be very expensive to build and could employ local labor. Local village tract officials could identify the best sites and an investment budget could be developed after evaluating costs, acres to be irrigated and perhaps the need. One difficulty was that non-government people did not have much faith that the official bureaucracy would be able to implement these projects well. One possible solution is to have an NGO contract the work and hire competent government technical people as consultants, as has been done in the Dry Zone. The payoff from providing dry season water for farming would be high. It would likely further persuade Rakhine farmers and land owners to hire more badly-needed Muslim laborers, as the returns to both labor and land would rise. The availability of a profitable second crop acts like a tax on prejudice; the prospects of greater financial profits could incentivize Rakhine farmers to re-engage Muslim laborers. It would also increase incomes broadly for all groups and provide more agro-processing and marketing jobs.

Roads and electricity are being upgraded but there is a great deal more to do. The road to Maungdaw town, in particular, was in very bad shape but is apparently scheduled for an upgrade soon. Electricity availability and reliability would make industrial processing much easier and more widespread. Including all areas of Rakhine State in these plans is essential. We also found that port upgrades to Sittwe and some smaller ports were likely to be low cost and would probably generate a good return. (We did not find this to be true for Kyauk Phyu port as shown in the analysis in Appendix A.) In summary, continuing and intensifying the improvement of infrastructure is an essential activity to promote agricultural and other development.

Perhaps the biggest surprise in our trip findings was that allowing the free movement of Muslim people was supported not only by the Muslims, but also by many Rakhine people. Many landless Muslims had previously lived by moving from township to township to work on land preparation, harvesting and construction jobs. With the current restrictions on movement, it is very difficult or impossible to do this. This results in severely reduced incomes and consumption, and much higher poverty rates. It also restricts the ability of Rakhine people to farm as much as before without adopting greater mechanization. Since credit is limited, it is hard to offset this big loss of labor. (In addition, the use of larger machines will require land leveling, an expensive process that will take several years to accomplish even if funds were available.) A careful consultation is needed, but if combined with seed, water and infrastructure investments, it is likely that broad if not universal support for lowering restrictions on labor movement within the state should be possible. Improving in-state labor mobility, by itself, would do more to improve agricultural output and reduce poverty than any other single policy.

A special issue involves where Muslims currently housed in camps could live as the camps are closed. The Muslims generally prefer to return to their old homes. Many of their Buddhist neighbors say they do not want them back. This is due to a mixture of genuine fear and some opportunism, as the formally Muslim land could then be acquired by the Buddhists and in many cases the plots are in good locations. In general, the Muslims should be given a choice of moving back or of moving to a new location with assistance. Some Muslims may decide that they would feel more secure in a new location, and indeed with the escalation of conflict, this may be safer. Increased police patrols, better communication and other steps could help resolve these issues.

There is the further question of whether to allow the movement of Muslims not only within Rakhine State but among states and regions in Myanmar. This is a national decision, but if a united front of parties within Rakhine State voted in favor of such mobility (as a resolution, not a law), it might cause the new Union Parliament to consider the change more quickly and favorably.⁴ Given the recent violence, selective permission may be a first step. Most people thought young Muslim people would definitely go to Yangon for a university education and that business people would again visit other areas to make contacts and sales. But neither of these necessarily involves moving out of the state for good. Some thought that landless laborers might move to areas outside of Rakhine where labor demand was steadier and year-round earnings would be within reach. (One Maungdaw laborer said he was now “lucky” to get only four months of work a year.) Others thought that allowing movement within Rakhine would reduce the likelihood of laborers moving out of Rakhine. Most agreed that if there were large movements out of the state, it would open the possibility of more migration from Bangladesh, though rapidly rising wages in Bangladesh may diminish the incentive for migration into Rakhine. On balance, if even limited mobility within the state were allowed, it seemed less likely that large numbers of workers would leave since

⁴ This is not the same as citizenship. Muslims who are long resident in Myanmar could be given a “right of abode” and mobility without being citizens. A path to citizenship could be offered with tests of language, saluting the flag, etc. if thought appropriate. Interestingly, one Muslim said he was quite willing to give a “western” salute to the Myanmar flag but not a “Burmese salute” which involved bowing to the flag. Perhaps a compromise is possible.

steadier work would be available in nearby places if not the locality where the workers lived. In any case, national mobility is likely to be off the table for some time due to concerns about Muslim extremism.

The question of credit came up again and again. Everyone agreed that banks were often not available and credit costing 10% a month made it hard to mechanize or even apply fertilizer. In Muslim areas, the religious prohibition on paying interest made things even more difficult, though there are alternatives using fees and a kind of profit sharing. If credit is expanded, offering Islamic forms of finance to both Muslims and Buddhists should be explored.⁵ It could lower risk and might be attractive if variable weather or pest attacks make regular repayments risky. However, credit is not a substitute for better seeds, more information on soil testing and pests, improved roads and irrigation for second crops. Rather, it is a complement as other inputs are improved.

Another point that was raised concerned the depletion of coastal fisheries. Many Muslim families relied on artisanal fishing but the use of huge foreign trawlers and nets that scoop up and destroy most sea life had reduced fish catches to very low levels. Enforcement of fishing laws would be required to begin a process of recovery.⁶ Fish and shrimp farms are an alternative, but require secure land ownership and significant capital. There is considerable potential to develop both capture and farmed fish production. This would also lead to processing jobs and exports of fish from the state.

Another issue in agriculture was the land situation. Perhaps 10 percent of all land has been taken over by the military, border guards and police. Often this land is “rented” back to the original owners who have to pay a rent of 25-40 percent of their output! Sometimes it is rented to others, or sold or used for other purposes, such as golf courses. Investment in land which can raise output is risky if tenure is not secure, and of course the families who lost their land are much worse off. Though this is not as large a problem as labor mobility, seeds, credit or water control, it is an issue that needs to be dealt with. It is our understanding that under current laws, military land will be exempt from re-examination or legal challenges. If it is possible to change this, at least for farm land, it would rectify some dubious land takings and allow many families to regain their livelihoods. (Beach front land taken for development in Rakhine State is not included in this discussion.)

In summary, the productivity and output of agriculture in Rakhine State has several favorable development possibilities. Improving the mobility of labor within the state is the first and least costly step. Supplying better seeds and investing in small water control projects are next in priority and would yield immediate benefits, improving both the returns to land and labor. Promoting credit and better transport are next – both take time. Continuing to expand grid electricity and electricity supply would help reduce the cost of pumping water and improve the prospects of agro-processing. Anything that can be done with land tenure and security, including revisiting past land seizures, would be pro-growth and also pro-justice

⁵ Islamic finance companies offer a variety of products that allow borrowing such as *murabahah* which uses fees instead of interest and *mudharabah*, which is risk sharing – the bank gets a share of the increased output from a fertilizer loan, for example. But if bad weather or pests destroy the crop, there is no return of interest or, depending on the type of the agreement, even the capital for the bank. Working out the terms on a pilot basis would ensure limited losses and fine-tuning of practices before wider use.

⁶ The government of Indonesia has aggressively enforced its ocean sovereignty by checking all fishing boats and, in many cases, sinking illegal ships after the crew has been safely removed. This has reduced illegal fishing.

and equity. Taken as a package, these steps would create strong financial incentives for Buddhists to support Muslims to be able to work on their plots, as it would increase the demand for labor, which is already in short supply due to the restrictions on movement and migration from the state. These steps would raise the incomes of all communities and most regions within Rakhine State and possibly begin to attract back some of those who have moved to Yangon and other places.

A SWOT Analysis

A technique used to summarize the strategic position of businesses is a SWOT analysis – it stands for **s**trengths, **w**eaknesses, **o**pportunities and **t**hreats. It is sometimes a useful way to summarize a variety of external and internal factors that could influence the future of the firm. In this case, it is being applied to the economy of Rakhine State, but the analytical approach is similar. In this analysis, we go beyond agriculture because some of the issues have broader applicability.

| Strengths | Weaknesses |
|---|--|
| Geographic location close to India and China Ocean front property on Bay of Bengal Soon to be completed road upgrade to Yangon Tourism attraction in Mrauk-U Improved local administration coming | Poor infrastructure/ government capability High migration of educated/labor costs Religious tension Very low incomes/ poor economic vitality High transport and credit costs |
| Opportunities | Threats |
| Could liberate local labor supply Improving roads/power/irrigation Agriculture multi-cropping/higher yields Sittwe port improvements Attract back young workers | Renewed religious conflict Imported Islamic terrorism Land takings increasing poverty Uncontrolled migration from neighbors Environmental degradation/climate change |

This table can be added to or elements can be subtracted, but it shows the range of variables to consider, even if does not create priorities or establish inter-relationships among policies. For example, a comprehensive approach to improving agriculture and reducing poverty would include improving labor mobility and land security, providing better seeds and farm information, investing in roads and water control and inviting banks to expand lending for agro-processing and farm inputs. The main idea in this paper is that large increases in output, labor demand and productivity are possible. If pursued, these will provide an incentive to landowners and businesses and thus make it likelier that Buddhists will hire Muslims and support their movement within the state. Increased demand for labor for longer periods over the year would reduce poverty. None of this would be coerced or required, but more and more people would see the benefits of cooperation.

The SWOT analysis refers to the threat of imported Islamic terrorism. This is something to take seriously. There are extremists in Bangladesh and the border is porous. The Muslim population in northern Rakhine is closely controlled and, because of movement restrictions, very poor. It is possible that some extremists have already infiltrated into Rakhine State. Nothing would set Rakhine State back more than an outbreak of violence that sets each religious group against the other. Urgent attention to improving the mobility of

Muslims within the state would help to defuse this threat, though it needs to be done with broad support so as not to fuel Buddhist extremism or reactions. Current information is that local Muslims do not support extremism, but this could change if conditions do not improve.

There's the difficult question of how to improve the government bureaucracy without relying on it to deliver infrastructure projects, which it may not implement well (at least at first). People and institutions learn by doing, but unless there is an ability to promote competent people and fire or sideline the less competent or corrupt, it will be difficult to develop morale and capability. For larger projects, it will be necessary to use the bureaucracy, if only to monitor private contractors. Hiring consulting engineers or similar parallel monitoring capability is one way to ensure adequate quality and cost competitiveness while helping to upgrade skills within the civil service. For smaller projects, using NGOs is a possibility, especially if they hire competent government engineers or experts as consultants. If combined with a seasoned NGO engineer, skills can again be improved on the low end of projects. Small ponds (including for drinking water), tube wells (though rocky conditions make location critical)⁷, and small dams or temporary dikes to capture fresh water from streams are all likely to prove useful for creating additional water supply and control. The impact of providing water for a high-yielding second crop is hugely positive, even when the second crop is not paddy. Many farmers grow vegetables, peanuts, green gram or other pulses in the dry season. These use less water (so a given amount of water covers more land) and this crop diversification can reduce pest problems. It may also improve soil quality.

Although it was not the focus of this report and was excluded from the SWOT analysis, an earlier visit to Kyauk Phyu and subsequent investigation raised significant questions about the commercial viability of the proposed port investment. This analysis is covered in Appendix A.

⁷ Arsenic in groundwater is a common problem in Bangladesh and should be tested for in Rakhine State. UNICEF or other aid agencies may be able to help with testing, although a state laboratory should be set up. Arsenic is a poison that causes many health problems well before it kills from an overdose. There are low-cost filtration options to reduce the problem.

Appendix A: Kyauk Phyu Port and Industrial Zone

The area around Kyauk Phyu is where the Chinese pipelines carrying natural gas and crude oil come ashore and begin their way to Yunnan Province in China. These pipelines are important for China and are not a part of this analysis. The agreements concerning their security and payments for transit should be respected. The proposed port and industrial zone investment is new investment. Kyauk Phyu has a very deep port that can take ships of up to hundreds of thousands of tons. The proposed investment is reported to cost more than \$7 billion when completed.

The population of Rakhine State is 6 percent of Myanmar's, or just over three million. If Rakhine's foreign trade were proportional to population, it would amount to \$2 billion, though this is an overestimate for the state if oil and gas is excluded. Oil and gas should be excluded from the total trade figure since they do not use the proposed port but rely on pipelines instead. Most trade into Yunnan is modest, oil and gas aside, since the road there is long and not especially good. (There are already good links to Haiphong port in Vietnam, which is closer to Kunming, the Yunnan capital, than is Kyauk Phyu.) Yunnan's total trade is \$30 billion and if oil and gas are excluded, at most \$6 billion of trade would use Kyauk Phyu port even with an upgraded road. If a \$20 billion railroad were built from Yunnan to Kyauk Phyu (and none is currently planned), the fraction of trade going through Rakhine might double to one-half of Yunnan's non-oil or gas total or \$12 billion. Jade and rice would still cross at Muse and most Chinese exports to Myanmar would not go through Rakhine. So total trade, excluding oil and gas which would not use the proposed port is less than \$14 billion, less than one-tenth of the trade of southern Vietnam.

In southern Vietnam's Vung Tau province, seven deep sea ports were built for a total cost of \$2 billion. They serve a region with 30 million people and \$140 billion in trade. The ports are 20 percent utilized, with other ports in Saigon taking some of the business. This would suggest that far less than \$500 million in port investments in Kyauk Phyu could handle all of the non-oil/gas trade for many years to come. Meanwhile, the industrial zone has very limited prospects due to a lack of labor supply and should not be built out to more than a very modest extent. It is our impression that the proposed investments cost much more than similar regional sites in Southeast Asia that are comparable for port, infrastructure and industrial zone investments.

More to the point, there are two kinds of container ships – small/medium and large. The small/medium ships collect containers at smaller ports and take them to major centers like Singapore where they are put on huge “mother ships” to go to Europe or America. These feeder ships hold hundreds or a very few thousand containers and need perhaps 10-12 meters of port depth. The mother ships hold more than 10,000 containers and need more than 15 meters.⁸ Rakhine, even with trade from Yunnan, will need feeder ships rather than mother ships because the large ships have a high daily rental and cannot waste time loading small numbers of containers. Upgrading Sittwe port, where there is more population and

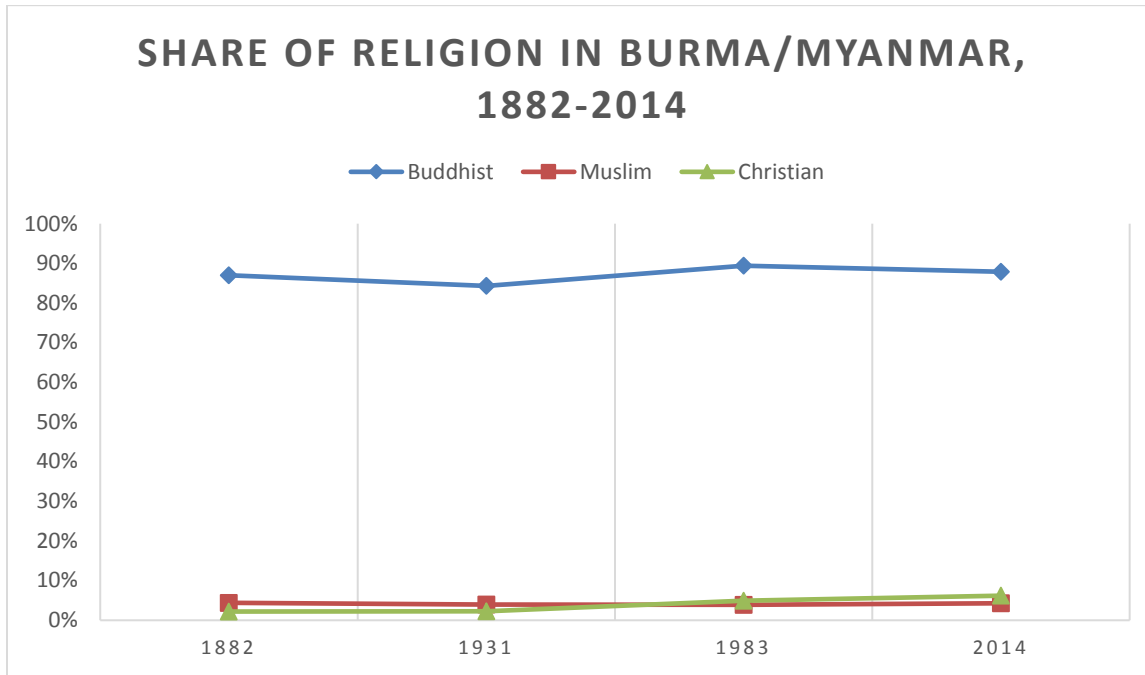
⁸ A typical container's value of goods is about \$50,000. This would imply 20,000 containers per billion dollars of trade or 120,000 containers a year for Kyaukphyu without the railroad. Using a port handling fee of \$160 per container, that would generate less than \$20 million a year in fees. An investment of a very few hundred million dollars might be justified based on this calculation.

prospects for activity, makes sense. This is already being done with Indian investment, though it could be improved a bit more. The Kyauk Phyu project has little commercial justification and should not be permitted to absorb scarce investment funds from Rakhine State or even central sources. Issues of control and extra-territoriality⁹ might also be considered but are beyond the scope of this paper.¹⁰

⁹ Most ports are controlled by the host government, not by a foreign company or power.

¹⁰ We heard rumors of large land acquisition by Chinese firms around Kyauk Phyu and possible onshore gas deposits in the area, but had no time to verify these reports. If true, they could explain some of the interest in Kyauk Phyu on the part of China.

Appendix B: Share of Population by Religion in Burma/Myanmar Since 1882



Source: National Censuses in 1882, 1931, 1983 and 2014

The argument that some combination of migration, conversion, and high birth rates are shifting the balance of religions within Myanmar, especially towards Islam, is not true and has not been true for well over a century. Buddhism is overwhelmingly predominant and shows no sign of losing its supremacy, though Christianity has grown since 1983 according to the two last censuses.