



MALAYSIA'S POLITICAL TRANSFORMATION

BRIDGET WELSH, ASSOCIATE PROFESSOR OF POLITICAL SCIENCE, JOHN CABOT UNIVERSITY

OVERVIEW OF PRESENTATION

- Five separate interrelated developments:
- 1) Election: GE14 Election and Results
- 2) Electoral Turnover: May 10th and Beyond
- 3) Reconfigured Political Actors
- 4) Economic Transformation: End of Najibomics
- 5) Political Transformation: Reversal of Political Decay
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GE14 ELECTION RESULTS

- National swing 10.8%, some areas up to 30%, e.g. Johor, Negeri Sembilan, but not a “landslide” victory.
- Majority, but not comfortable majority
- Pakatan Harapan Victory ‘Malaysian, including East Malaysia and semi-rural/rural areas.
- Overpowered electoral obstacles through awareness, scope of victory and regional breadth of victory
- Pakatan Harapan victory credit to East Malaysia, 26 seats
- Sweeping changes at state levels. PH controls 9 state governments (margins Sabah, Perak and Kedah slim). BN only Pahang and Sarawak. PAS Kelantan and Terengganu

	Seats	Popular Vote
Pakatan Harapan	113	47.9% (gain 10.8)
Warisan	8	
BN (UMNO + PBB+ MCA+MIC Sabah parties)	79	33.4% (loss 13.6)
PAS	18	16.9 (gain 2.2)
Others	4	1.8

GE 14 RESULTS: PRELIMINARY ESTIMATED PATTERNS OF VOTING

BN Support	2013	2018
Malay	54%	40%
Chinese	20%	15%
Indian	42%	38%
Urban	38%	36%
Semi-Rural	53%	42%
Rural	64%	55%

- Turnout 74% (now moved up to 82.3%. Data from EC lacks consistency) Lower than 2013. Drop due to Wednesday timing, and loss of support for BN
- Largest Swing Seat Level – Semporna 65% Langkawi 38% vote. Tied to personalities.
- “Malay Tsunami” or “UMNO Tsunami”. Not all Malay support to PH, defection to PAS. Not a ‘tsunamic’. Erosion of UMNO political base real and substantial.
- Preliminary results suggest changes across ethnic groups and regions away from BN, but this is uneven across the country and unevenly distributed

Please note that findings are **preliminary** estimates based on state and 15% of polling station results

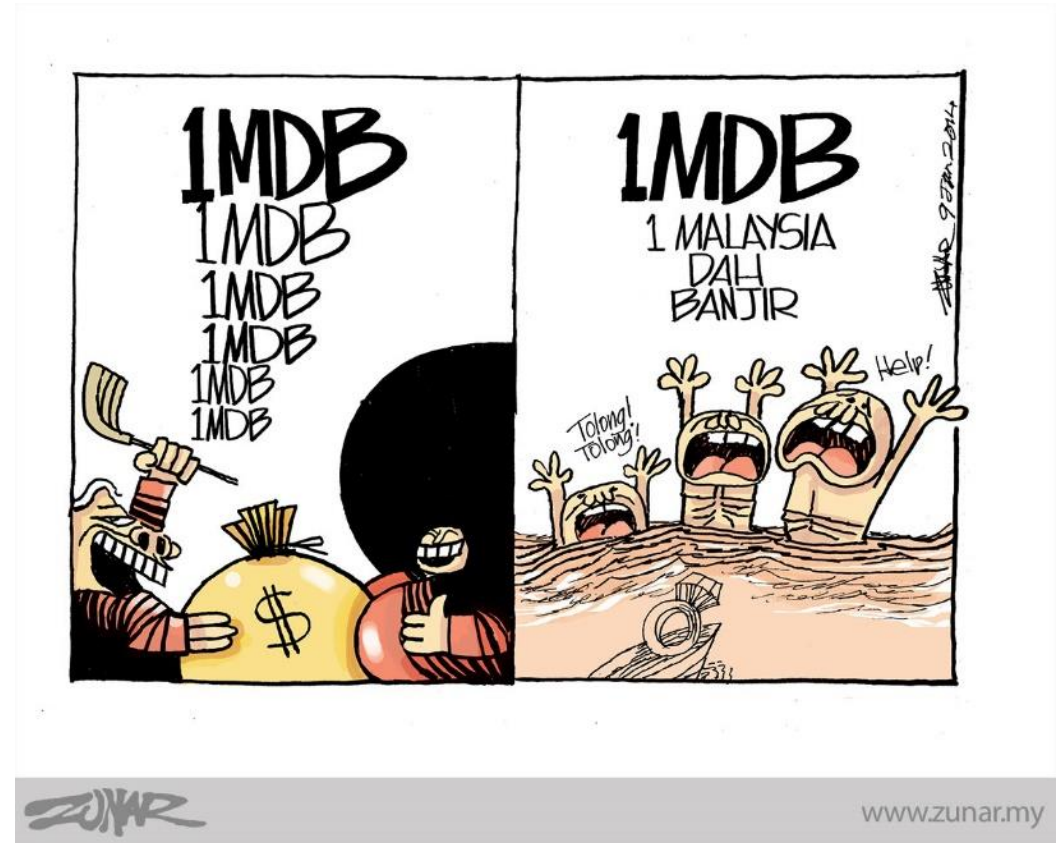
GE RESULTS TAKE TWO: IMPACT FOR POLITICAL PARTIES

- Pakatan Harapan (PH) new national multiethnic coalition
- Composition of PH victory and party distribution. PKR (47) won most seats, followed by DAP (42), Bersatu (13), Amanah (11), and Warisan (8) smaller number of seats.
- Different coalition model compared to BN: Equality but not equal representation.
- Bersatu controls more state governments than representation. Delicate balancing of representation inside parties.
- BN is dead as a viable national coalition
- Significant loss for UMNO in UMNO base. Total 54 seats for party, more than halved 24% of parliament.
- Back to East Coast 1999 Core: PAS holds 18 seats (down from 21), won two state governments Kelantan and Terengganu.



GEI 4: LEADERSHIP NARRATIVE: THREE MEN (AND A WOMAN)

- Understanding the election – three narratives
- Mahathir as “game changer” and “master strategist”. Symbolic role as ‘safe landing’ and ‘example of national sacrifice.’
- Najib as liability, as target of opposition and antipathy. Scandals 1MDB. Anger towards Rosmah Mansor, Najib’s wife, especially within UMNO ranks
- Anwar as reform anchor to provide cohesiveness to opposition, but not a major player in campaign and not his mandate



GE14: SOCIO POLITICAL FORCES

- Tax revolt – anti GST and economic conditions, notably inequality and precarity (high household debt)
- Nationalism “Save Malaysia” and Malaysian identity prioritized
- Institutional Decline of UMNO (Najib’s party)
- Broad reform momentum, e.g. v, anti-corruption and democratic pressures
- Opposition organization and strengthening since 1999, long learning process
- Middle class and globalization forces within society, as base of support for opposition among higher classes.
- Less impactful explanation compared to above
- Limited embrace of non-racial identity / Counter reaction to rise of right. Conservative forces are still present in Malaysia. Yet strengths of pluralism are also evident.



GE14 CAMPAIGN NARRATIVE

- Momentum gathered in campaign, towards “safe” place in risk taking.
- An ‘emotional’ election, helps account for change as focus was on emotions.
- Failure of BN strategies – vote buying, Najib-centered campaign, over-confidence. BN did not introduce new tactics. Loss of trust.
- Backfire in campaign towards regime for EX excesses– Mahathir photo, EC shenanigans on campaign regulations, pressures on civil society
- Dominance of narrative by opposition, strategic role of Rafidah and Daim for business elites.
- Neutralization of racial campaign by opposition’s use of “Malay tsunami” framing
- Social media ‘virality’ mobilization. ‘WhatsApp election’ counteracted Cambridge Analytica/other companies and bot dominance of BN
- PAS took UMNO votes, comfortable “race” and “religion” space. Mobilization of religion worked against UMNO.



ELECTORAL TURNOVER ON MAY 10TH SAVING OF DEMOCRACY

- Turnover of government first in 61 years. Not regime change.
- Critical acceptance of the results pushed by 'insiders' in system
- Strategic claiming of results by Mahathir late May 9
- Attempts to win over defections with delays in swearing in. Effective in Sabah initially. Subsequent discussion of defections to PH.
- Attempts to foster division in PH, playing off differences and ambitions, offering of PM-ship to Wan Azizah rather than Mahathir
- Role of the economy and elite interests as constraint on violence and factor contributing to acceptance of results, but turnover dynamic illustrates problem of resistance to change inside system.
- Problems of turnover not just at federal level, but state as well. Source of instability.

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BECAUSE I'm
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NEW PH GOVERNMENT

- Mahathir leadership, but new checks on his power (coalition and public pressure)
- Five party coalition – Bersatu, PKR, DAP and Amanah with Warisan (and a couple of independents). Idea of equal representation, but different views inside of representation.
- Small majority of less than 15 seats at federal level, less at some state levels, except Penang and Selangor.
- New government composed of former UMNO and PAS members, DAP stalwarts, civil society actors. Long involvement in politics. Considerable experience in government.
- Limited relationship with each other as opposition is less than one year old, “trust deficit”
- Professional politicians with some professional backgrounds
- Multi-ethnic coalition, but seen to have less Malays than BN
- Wide spectrum of political outlooks, umbrella coalition
- Common drivers of nationalism and reform, built around anti-Najib anger



PAKATAN HARAPAN GOVERNMENT TAKE 2

- Mahathir likely to get two years, until 2020. Anwar will likely assume mantle leadership
- Common ground Najib, Anwar, Economic strengthening (importance of building traction here)
- Points of contention: personality (and power ambitions), party jockeying, positions, differences over scope of political reform, economic policy (neoliberal versus more social democratic/populist alternatives), role of religion, race and racial policies (affirmative action)
- Greater role of technocrats, civil society activists and nationalist momentum
- Embrace of opportunity, but recognition of constraints. Expect inevitable disappointments in climate of high expectations. Compromises and learning will be necessary.
- Change will be slower process than recent events suggest. Past shapes present and present limits the future. Example of 'UMNO culture' in Pakatan Harapan





‘NEW’ (AND ‘OLD’) OPPOSITION

- End of Barisan Nasional . No longer multi-ethnic coalition. Close shop, re-ally/ become independent or become active opposition (MCA and MIC will likely close shop, move away from formal party representation to more societal NGO, Sabah parties carving out new space and alliances and PBB will likely be more autonomous. Challenge dealing being on “outside” for BN parties.
- Not the end of UMNO, but battle inside for the future identity of the party between “old” racial politics (Zahid) and “new” more governance issues (Khairy). Potential illegality and likely internal focus.
- Rise of PAS. Divisions inside party alliance with UMNO. Hadi’s men have gained power, but checks and resistance inside. Leadership will face pressures from grassroots. Agenda and alliances crucial. Potential alliance with UMNO as “joint opposition”
- Perpetuation race and religion as likely dominant opposition narrative.
- Resistance inside the system to reform and for survival. Inevitable anger and response, as this involves livelihood.

ECONOMIC TRANSFORMATION: END OF NAJIBOMICS

- Middle Income Trap
- Driver of Economic Growth/ Key Sectors
- Social Inequality and Distribution (Social Democracy)
- Race and Government Policy
- Sources of Revenue/ Debt Burden
- Role and Management of GLCS
- Relationship with China and other investors
- Reconfigured relationship with “old” and “new” cronies
- Tensions neo-liberal orientation and different actors
- Inevitable connection between economy and political power
- Challenge of implementation and internal resistance



IMDB AND “CORRUPTION”

- Focus of transformation initially will be on Najib's economic legacy
- Key targets: GST and IMDB
- “Infrastructure” projects
- Yet areas to watch beyond this are:
 - Scope of privatization
 - Management of foreign capital/ownership
 - GLC restructuring
 - Relationship with state governments, expect decentralization pressures
 - Transparency in economic data and numbers



REVERSAL OF DEMOCRATIC DECAY

- Different realms of reform and likely scope for results
 - Laws and legal reform
 - Institutions – checks and balances, institutional integrity, efficiency and governance practices
 - Corruption
 - Electoral Reform
 - Justice Cases
 - Race Relations
 - Human Rights
 - Islamization



MALAYSIA'S EXAMPLE: DEMOCRATIC FORCES REACTIVATED

- People's power and democracy is not dead
- Lessons of need for strategy/hard work, cooptation of nationalist agenda, excesses of greed/scandal in climate of inequality
- Complex varied processes at work, inside and outside the system
- Conservative forces remain strong and need careful strategic engagement, but possibility of democracy reborn
- Cautiously optimistic: Hard work ahead – leadership grooming beyond Mahathir and Anwar; both men can leave legacies but these will need to be further inculcated.

