



The Best of
2025
Our Audiences'
TOP PICKS

December 2025





PROMOTING LEADERSHIP AND
STRENGTHENING CIVIC PARTICIPATION

Institute for Strategy and Policy – Myanmar

Established in 2016.

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EDITOR'S NOTE

The year 2025 has come to a close. Over the past twelve months, Myanmar has continued to endure the long shadow of war following the military coup, while also confronting the devastation of the Sagaing–Mandalay earthquake. Compounded by conflict-driven socioeconomic crises, daily life for many has become a constant struggle. For most, the focus has simply been on getting through each day. Yet sustaining public resilience requires more than physical endurance alone; it also depends on mental strength and shared understanding.

In this context, careful analysis and reliable data matter more than ever. This *ISP Audiences' Top Picks* brings together the research and analysis published by ISP-Myanmar in 2025 that resonated most with our readers. Over the year, we produced **571 research-based outputs** and launched the ISP Column, publishing **105 columns** to amplify diverse youth perspectives. Our work reached **more than 44 million views** and reads on a single social media platform, and was **cited over 200 times** by media and research organizations. This engagement is both a source of encouragement and a powerful motivation to continue serving Myanmar's society. We are deeply grateful to our readers for your trust, engagement, and thoughtful feedback—and we warmly ask for your continued support in the year ahead.

In selecting the publications, we considered both social media engagement and input from Gabyin members. We begin with “**ISP-Myanmar in Numbers – 2025**,” followed by a top ten list capturing the year through data and insight.

■ ISP-Myanmar in Numbers 2025

20,412

The ISP Gabyin Community, an exclusive virtual space for subscribed members, has amassed over 20,000 members.

59%

ISP-Myanmar's email newsletters to foreign audiences achieved an impressive average open rate of 59 percent.

571

A total of 571 publication issues were released in 2025.

105

The ISP Column published 61 columnists' 105 column articles.

215

Media outlets and research institutes cited ISP-Myanmar's work more than 200 times.

44,743,637

ISP-Myanmar's research findings reached over 44 million views across social media platforms.

1,481,784

Videos from ISP-Myanmar on Facebook and YouTube accumulated over 1 million minutes of watch time.

394,499

ISP-Myanmar has attracted nearly 400,000 followers across all social media platforms.



The Best of 2025

Our Audiences' Top Picks



1

ISP On Point

The March 28 Sagaing Earthquake: Earthquake Diplomacy and Potential Political Aftershocks

ISP-Myanmar examined the prospect of “earthquake diplomacy” and subsequent “political aftershocks” in the wake of the March 28, 2025, Mandalay–Sagaing earthquake, focusing on the scale of the devastation, the influx of international aid, and the shifting post-disaster conflict landscape. Published on April 1—four days after the quake—this ISP On Point analysis was ISP-Myanmar’s most widely read research piece of the year.

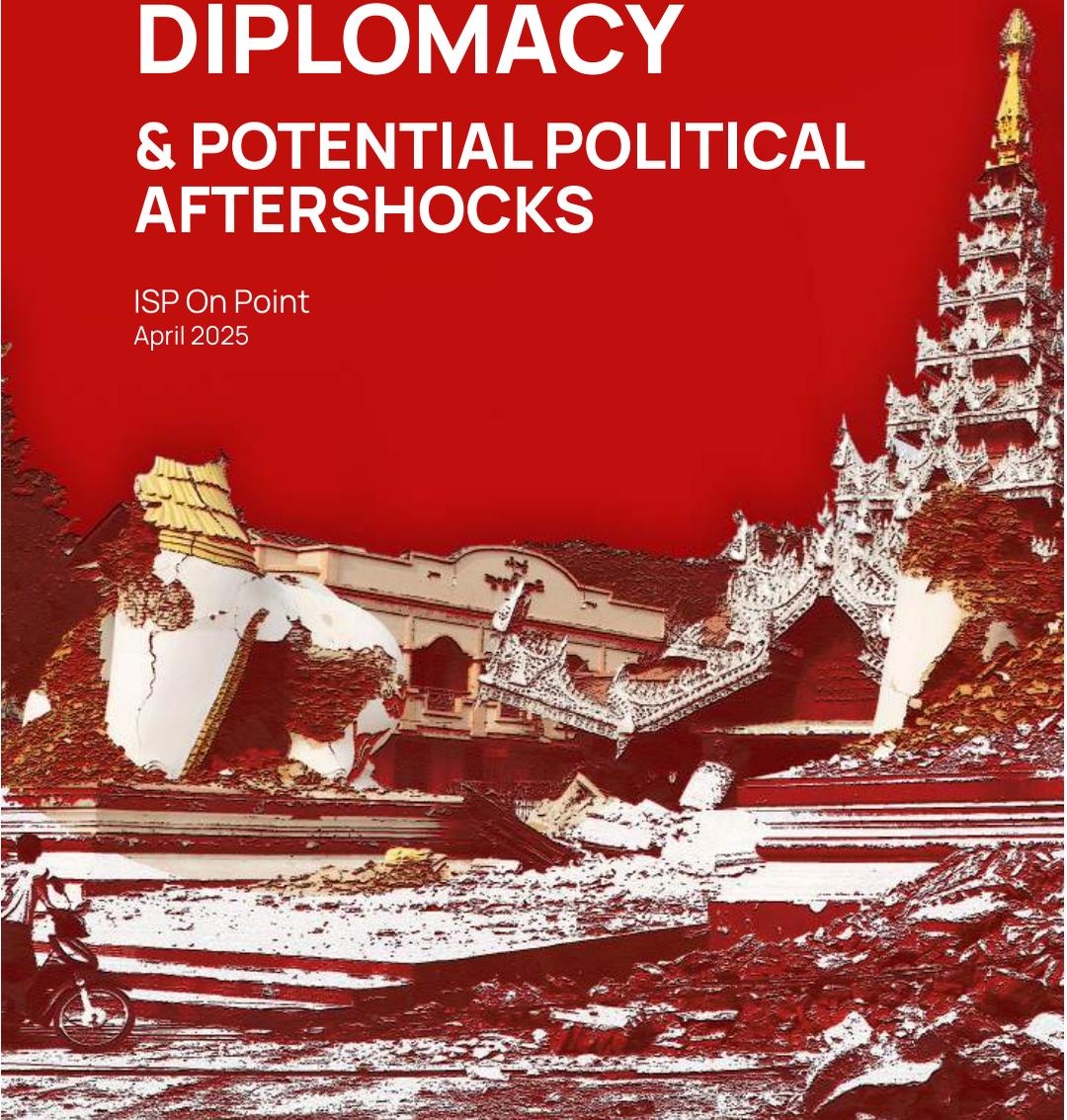




The March 28 Sagaing Earthquake:

EARTHQUAKE DIPLOMACY & POTENTIAL POLITICAL AFTERSHOCKS

ISP On Point
April 2025



■ Events

In response to the devastating Sagaing earthquake that occurred on March 28, 2025, nearly a thousand rescuers from China, India, Russia, Singapore, Malaysia, Thailand, and Vietnam arrived within 60 hours of the crisis to provide relief. International bodies and nations, including the United Nations, the European Union, ASEAN, the United States, the United Kingdom, South Korea, Australia, Norway, and others, have committed a total humanitarian aid worth at least 50 million USD. The National Unity Government (NUG) has declared a two-week ceasefire, except the defensive operations, in the impacted districts. The United Wa State Party (UWSP), the Shan State Joint Action Committee (SSJAC), and the Mongla Peace and Solidarity Council (PSC) also pledged to support financial aid. Ethnic Armed Organizations (EAOs) such as the Three Brotherhood Alliance (3BHA), the Kachin Independence Organization (KIO), and the Karen National Union (KNU) have expressed their condolences and committed to providing support in the needed areas. The State Administration Council (SAC) has designated the Sagaing, Mandalay, Magway, Bago Regions and the northeastern part of Shan State, and the Naypyitaw Council territory as emergency zones and is conducting rescue operations. Simultaneously, despite the devastation caused by the earthquake in central Myanmar, the SAC continues its military offensives and airstrikes among the towns in these regions as well as in Kachin State.

■ Preliminary Analysis

The “March 28 Sagaing Earthquake” is likely one of the most significant societal shocks faced by Myanmar. Beyond the absolute toll of deaths and destruction

caused by this earthquake disaster, the scale of relative tolls due to secondary effects—such as infectious disease outbreaks, famine, and crime— is expected to be immense. In particular, assessing the damage requires considering whether the earthquake struck regions with high population density, key economic and administrative hubs, areas with heightened pre-existing conflict, or regions with less economic development, or less conflict. Such assessments are essential not only to estimate the extent of the losses but also to gauge the effectiveness of rescue, relief, and reconstruction efforts. For example, the “March 28 Earthquake,” centered in urban areas such as Mandalay, Sagaing, and Naypyitaw, would result in a direct tally of destruction and cascading consequences. These include damage to basic infrastructure; the loss of religious, cultural, and historical heritage; disruptions to the economy and human resources; and the breakdown of administrative mechanisms, all amplifying the secondary adverse effects.

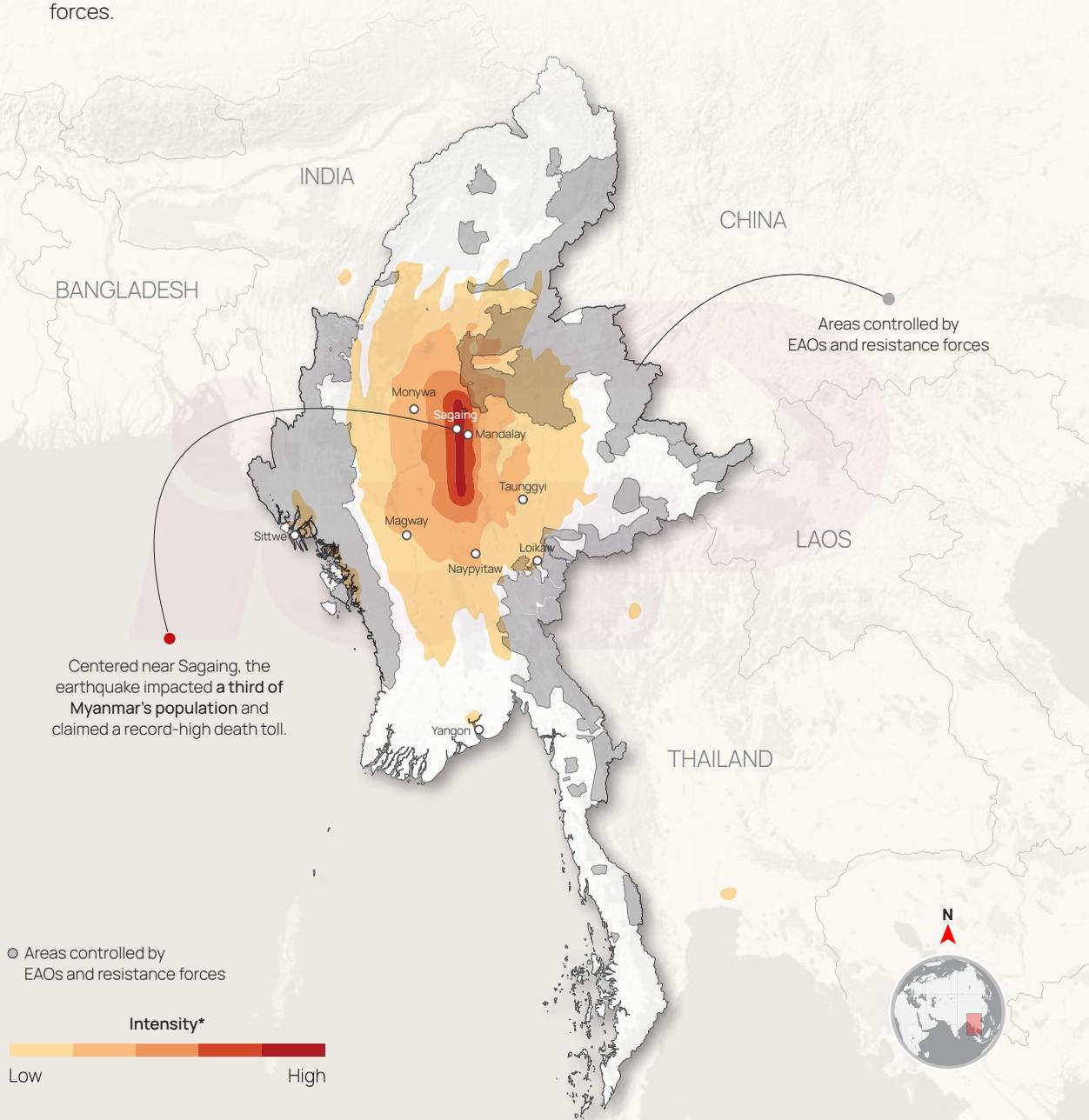
The massive earthquake’s effects were particularly severe in the Bamar regions of Central Myanmar (*Anyar*), predominantly under SAC control. This region, already strained by high tensions and ongoing conflicts between SAC troops and numerous local resistance forces, has faced significant damage. Conversely, data indicates that areas controlled by EAOs and other resistance groups faced relatively less impact from the earthquake. At the same time, the disaster has exacerbated Myanmar’s socio-economic challenges, elevating the situation from an acute crisis to system breakdowns in essential services like electricity and healthcare for some regions.

Central Myanmar Suffered the Worst

ISP Mapping Number 90

ISP Mapping

The “March 28 Sagaing Earthquake” of 2025 brought unprecedented devastation to central Myanmar. This central lowland region, under the control of the State Administration Council (SAC), experienced significantly more damages than those controlled by ethnic armed organizations (EAOs) and resistance forces.



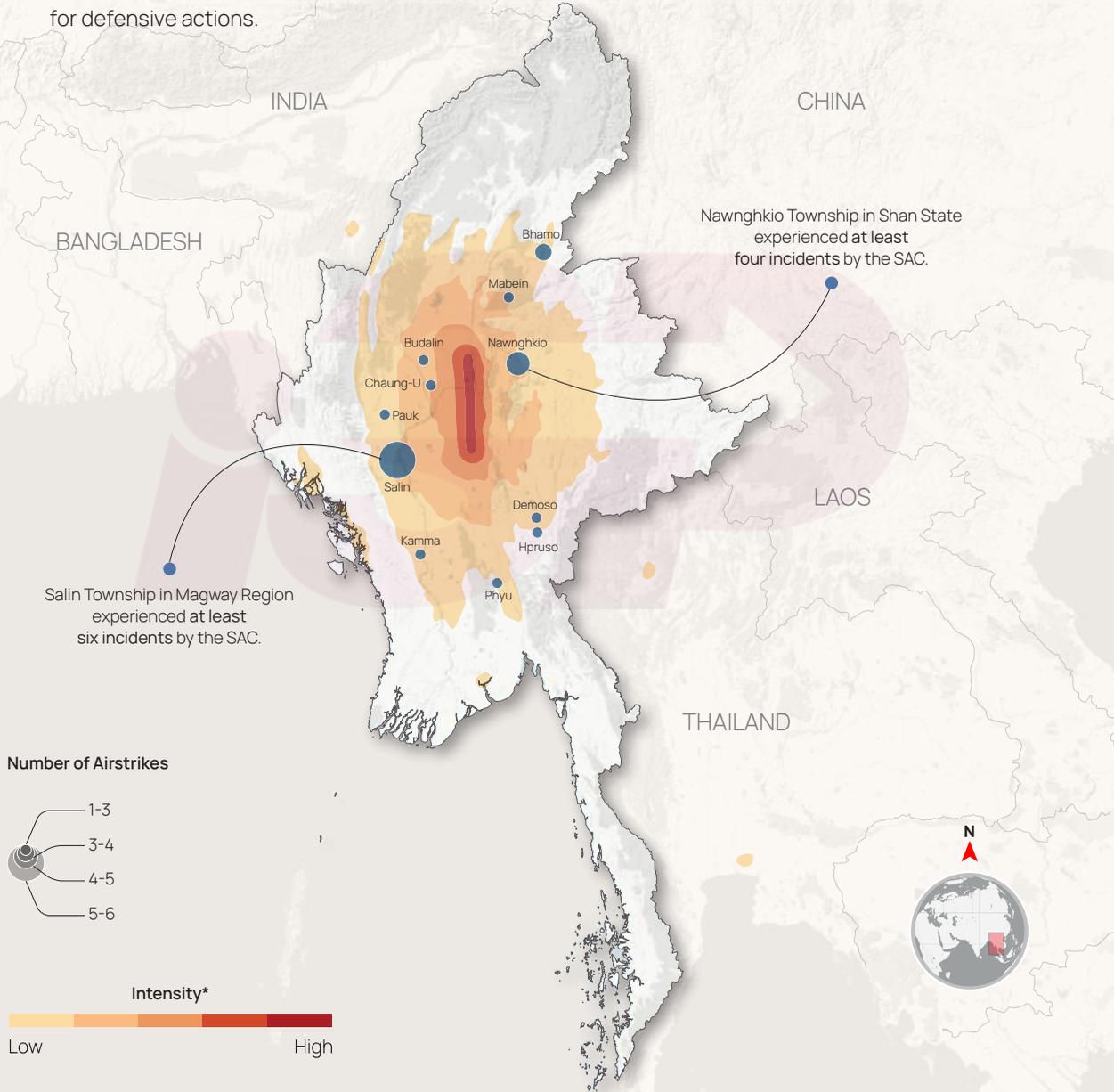
As of March 31, 2025, data are based on ISP-Myanmar's research and may vary from other sources due to methodological differences and data availability. (*) The intensity data, analyzed using vector data layers, is primarily sourced from the US Geological Survey (USGS) and detailed by The Guardian.

Airstrikes Continue Amid the Earthquake

ISP Mapping Number 91

ISP Mapping

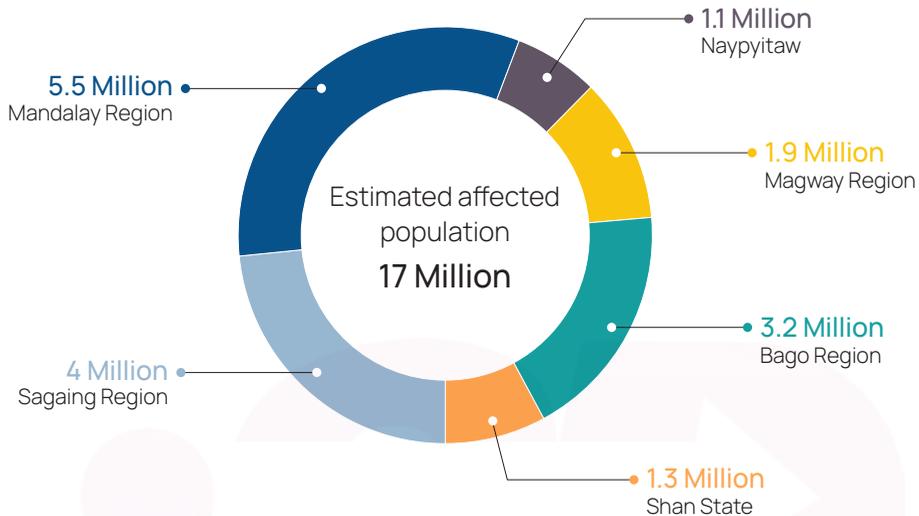
Despite the severe devastation caused by the “March 28 Sagaing Earthquake,” the State Administration Council (SAC) has continued its airstrikes. In the three days following the earthquake, at least 23 airstrikes were reported across no fewer than 11 townships. These included Budalin, Chaung-U, Pauk, and Salin—areas also significantly impacted by the earthquake. Meanwhile, the National Unity Government (NUG) has announced a two-week ceasefire in the earthquake-affected districts except for defensive actions.



The data, covering March 28 to 31, 2025, are based on ISP-Myanmar’s research and may vary from other sources due to differences in methodology and data availability. (*) The impact data, analyzed using vector data layers, is primarily sourced from the US Geological Survey (USGS) and detailed by The Guardian.

■ Nearly 17m People Affected

Approximately 17 million residents of Sagaing, Mandalay, Magway, Bago Regions, Shan State, and the Naypyitaw Council Territory were likely affected by the “March 28 Earthquake.”



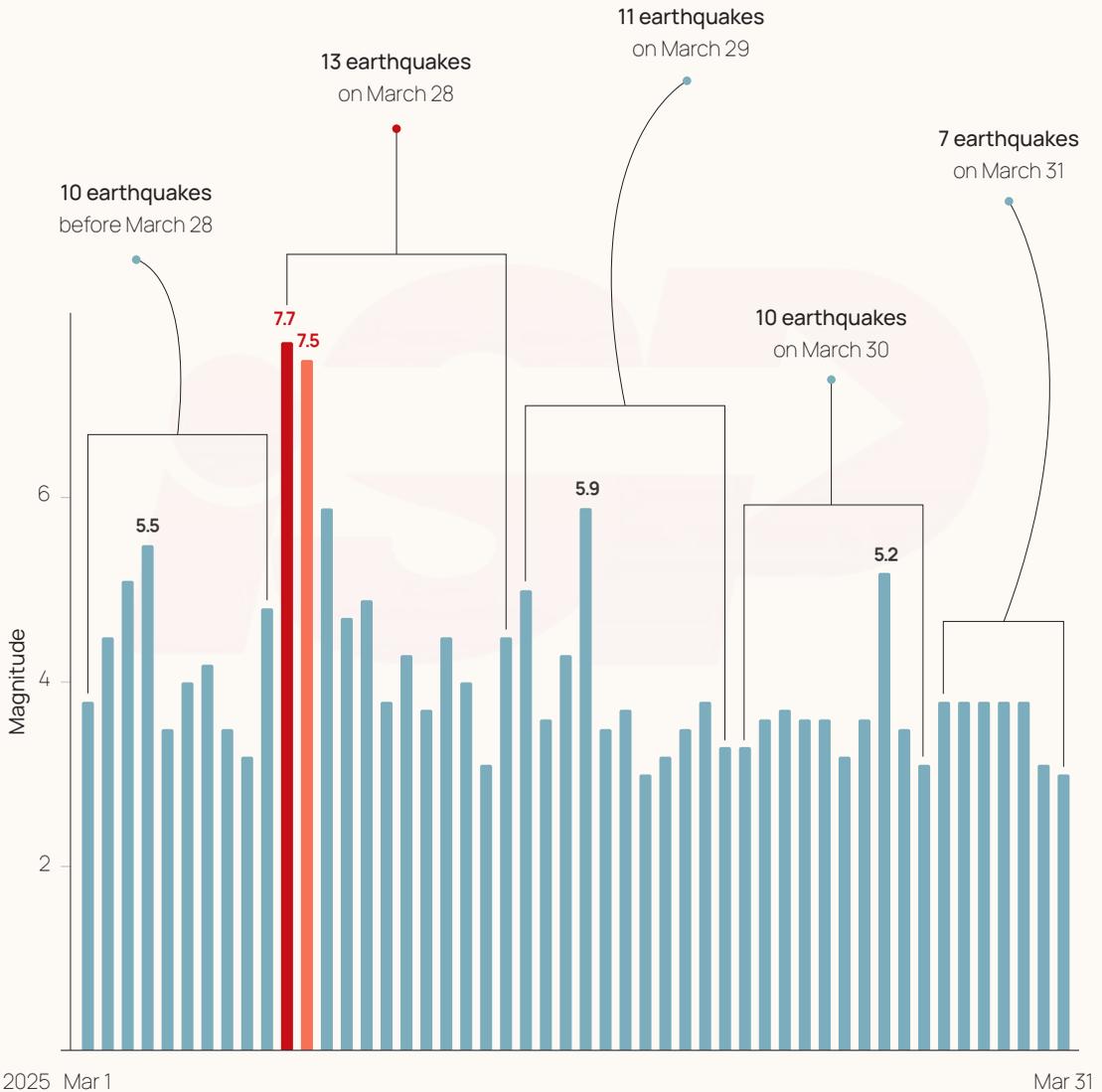
ISP-Myanmar calculated the affected population figure based on the demographic data of districts that experienced Modified Mercalli Intensity levels ranging from 5.5 (moderate) to 8.5 (severe), according to the US Geological Survey (USGS) and the most recent population data.

The international community's goodwill, especially from regional countries, should be acknowledged in light of this disaster. Since mid-2024, neighboring countries have been pressuring the SAC and resistance groups to de-escalate the armed conflict in Myanmar through trade, commerce, and investment projects. These efforts encouraged the SAC and resistance forces to consider a profit-sharing model. Now, it should be noted that the recent earthquake disaster presents an opportunity to push for a humanitarian ceasefire, essential for facilitating urgent humanitarian aid. In response to the crisis, Singapore's Foreign Minister, Vivian Balakrishnan, emphasized the need for a humanitarian ceasefire in a March 30 statement urging immediate action during this critical period.

The saying “Don't let a crisis go to waste” has been repeated so many times already. The term “crisis” originates from the Greek word “krisis,” which means a pivotal “turning point.” Researchers define such a point as a time when traditional solutions fail to meet challenges, compelling societies to develop new strategies. However, some view the earthquake disaster not as a crisis but as a mere temporary setback, comparable to a roadblock that merely requires a detour without necessitating a new route. This perspective focuses solely on the absolute tolls—deaths and destruction—while overlooking the relative or excess tolls, such as the collapse of societal systems and structures.

Myanmar Logged 51 Earthquakes of M3+ in March

According to the SAC's Department of Meteorology and Hydrology, Myanmar experienced 51 earthquakes with a magnitude of 3 and above during March 2025. Prior to the significant "March 28 Sagaing Earthquake," there were 10 such seismic events recorded.



These figures are based on data covering the period from March 1 to 12:00 PM on March 31, 2025, as reported by the SAC's Department of Meteorology and Hydrology. The Earthquake Observation Division of Thailand's Department of Meteorology reported a significantly higher number of aftershocks following the March 28 earthquake, with 157 seismic events of magnitude 3 and above occurring until 4:50 PM on March 31.

■ Scenario Forecast

When discussing earthquake disaster responses and relief initiatives, it is crucial to follow the experts and practitioners who possess both scientific knowledge and practical humanitarian assistance experience. ISP-Myanmar focuses on analysing the potential political aftershocks that could follow the immediate emergency relief. **The first scenario** is that the SAC may face public outrage due to its disrupted administrative mechanisms, incompetence, corruption, tendency to prioritize security above all else and continues oppression driven by fear, and take advantage of the crisis by strategically controlling or diverting domestic and international aid, redirecting of resources, or imposing blockades to aid. Resistance groups and Myanmar activists abroad may see earthquake aid as a political tool, using propaganda and advocacy to prevent the SAC from gaining support, leverage, or legitimacy through relief efforts.

The second scenario involves the potential delay of SAC's elections, which the junta chief announced will be organized in December 2025. The earthquake has severely impacted areas under the SAC's control, posing substantial administrative hurdles. Naypyitaw, a central stronghold for the SAC, seems to have experienced significant damage akin to that seen in Mandalay and Sagaing. If the SAC decides to proceed with the elections in December 2025, despite these adversities, it could lead to an outcome more catastrophic than the controversial 2008 constitutional referendum conducted during Cyclone Nargis in Myanmar. Pushing forward under such circumstances could exacerbate public discontent and aggravate existing grievances.

The third potential scenario is that, regardless of the type of regime—whether in the past (such as feudal monarchy, parliamentary system, one-party system, military dictatorship, or a pseudo-democracy with a military veto) or any new system that might emerge in the near future—the consequences of this massive earthquake could lead to a significant decline in Myanmar's majority Bamar society. This could lead to structural shifts in the Bamar society. For instance, in the aftermath, families struggling financially to rebuild their homes and livelihoods may be compelled to sell land and property, potentially triggering widespread internal and external migration and displacement. This displacement, when combined with that already caused by armed conflict and the Conscription Law, could significantly uproot Bamar populations from their ancestral lands and lead to massive capital flight. This could result in disruptions to education and healthcare for the younger generation, which could be severe and prolonged, setting back an entire generation. As a result, the type of structural displacement long endured by ethnic minorities in Myanmar might now severely impact the Bamar majority, increasing the potential for societal upheaval.

This third scenario is reinforced by **the fourth possibility**, the inherent characteristics of Myanmar's armed conflicts. While EAOs might show visible and wholeheartedly sympathetic relief efforts after an earthquake, it's unlikely to shift their military or political strategic calculus. If EAOs pursue conflict de-escalation, their decisions are likely influenced more by territorial control, conflict economies, and the strengthening ►

▶ of their negotiating positions or self-determination than by earthquake relief. Even if some EAOs, guided by genuine goodwill and a vision for a union rather than economic or ethnic-regional interests, are willing to de-escalate or initiate ceasefires, deep-rooted mistrust remains a barrier. Doubts will persist, from distrust of the SAC chairman to skepticism over whether regional mediators will treat EAOs fairly, given their status as non-state actors without sovereign authority.

Based on current trends, it appears unlikely that the SAC will reduce its attacks, including airstrikes and other forms of assault. In considering security threats and the security dilemma, the SAC seems not only to react excessively in tit for tat but also shows no inclination to abandon its relentless expansion of the war momentum. Although the NUG has declared a temporary ceasefire for the earthquake relief, this crisis may not be viewed as a pivotal point to de-escalate for others. For many within the Bamar PDFs, who envision seizing control of Naypyitaw and overthrowing the existing system, the earthquake has not significantly influenced their long-term strategy, and they would not consider de-escalating the conflict for an extended period, in contrast to the EAOs, who prioritize their battles for self-determination in their respective regions. The influence of Myanmar activists in diaspora communities and on social media, advocating for and fueling unrestrained combat, can exacerbate tensions, much like wind-fanning flames. At the same time, the SAC, who often fear the populace and panics about security, could put more restrictions on the operations of domestic civil society organisations, such as limiting VPN access or blocking the entry of foreign journalists. This could overshadow the more moderate

voices of local stakeholders amid the noise on social media. The predominance of social media could then drown out these essential voices, further reducing the chances of de-escalating the conflict. This analysis is backed by a study done by Brancati (2007), which analyzed the relationship between earthquakes and conflict across 185 countries from 1975 to 2002. The study found that earthquakes not only increase the likelihood of conflict but that their effects are greater for higher magnitude earthquakes striking more densely populated areas of countries with lower gross domestic products and preexisting conflicts.

In the case of other major EAOs joining the NUG's two-week ceasefire, it could create an opportunity, which is our **fifth scenario**. This ceasefire can be viewed from two perspectives: tactical and strategic de-escalation. Currently, a cessation of hostilities would aid earthquake relief logistics, safeguard civilians, ensure the flow of both domestic and international aid, and display a commitment to humanitarian spirit—constituting a tactical de-escalation. To evolve this into a strategic de-escalation, the ceasefire must be accompanied by confidence-building measures aimed at long-term political resolutions. These measures could include creating safe zones, establishing humanitarian corridors for aid delivery, facilitating joint management of aid by opposing groups, integrating Civil Disobedience Movement (CDM) workers into relief efforts, addressing the needs of those displaced by both the earthquake and conflict, and negotiating for the unhindered operation of independent media, civil society organizations (CSOs), and community-based organizations (CBOs). These steps could further foster discussions on post-disaster rebuilding ▶

International Aid Totals at Least \$50m

ISP Data Matters Number 151

ISP Data Matters

In response to the “March 28 Sagaing Earthquake,” international aid commitments have reached at least 50 million USD for rescue and rehabilitation efforts. This figure, based on announcements made up to March 30, includes not only monetary pledges but also contributions of rescue teams, food, medicine, and other essential supplies from a variety of countries. China has made the most significant contribution, committing humanitarian aid valued at 100 million RMB. Additionally, China has dispatched the largest contingent of rescue forces to aid in the relief efforts.

Countries	Amount	Amount in USD
China	RMB 100 Million	14 Million
European Union (EU)	EUR 2.5 Million	2.7 Million
Singapore	SGD 0.15 Million	0.1 Million
South Korea	USD 2 Million	2 Million
United Kingdom	GBP 10 Million	12.6 Million
Australia	USD 2 Million	2 Million
United States (US)	USD 2 Million	2 Million
Cambodia	USD 0.1 Million	0.1 Million
Vietnam	USD 0.3 Million	0.3 Million
Malaysia	MYR 10 Million	2.1 Million
Norway	NOK 120 Million	12 Million
Taiwan Red Cross	USD 0.05 Million	0.05 Million

Data as of March 30, based on preliminary information and subject to change over time. The exchange rates to US dollars are estimated based on market rates.

■ Nearly 1,000 International Rescuers Arrived

Within 60 hours of the “March 28 Sagaing Earthquake,” 985 members of various international rescue teams arrived in Myanmar. These teams include personnel from China, India, Russia, Singapore, Malaysia, Thailand, and Vietnam.



Data as of March 30. Aid materials from Bangladesh had arrived by this date, though the number of Bangladeshi rescue team members is not known. Additionally, the US, UAE, Laos, the Philippines, Belarus and other countries are also dispatching rescue forces.

► and political negotiations, potentially including election postponements and substantial talks on institutional transformation, such as issues related to the country’s constitution. To initiate this process of strategic de-escalation, domestic political organizations such as the NUG, key EAOs, the Shan Nationalities League for Democracy (SNLD), and groups like the 88 Generation could lead the efforts. However, for the SAC to adopt this path—characterized by goodwill toward the people and the Union and respect for national dignity—pressure and support from regional countries like China, Thailand, and India, as well as ASEAN and international bodies like the United Nations, are essential. This approach, often referred to as “earthquake

diplomacy,” uses the disaster as a catalyst to foster cooperation among adversaries, reduce conflict, and lay the groundwork for peace. Without effective international and regional intervention, the prospects for achieving strategic de-escalation through humanitarian efforts remain limited. However, whether it’s discreet diplomatic efforts or public expressions of desire from the masses for this approach, these should be valued and encouraged. At the very least, if there’s agreement to tactically de-escalate the conflict and cease hostilities, it could be regarded as a positive precedent amidst the adversity for the country. As Kelman (2012) pointed out, the pursuit of “peace from the ruins”—striving to create peace amid extreme suffering and destruction—makes

In 2024, over 5.6 million people experienced flooding, with over 24 percent of cropland flooded. This is only a tiny spillover of the climate crisis. In times of conflict and climate change crises, Myanmar's society urgently needs the emergence of everyday champions. Visit www.ispmyanmar.com or scan the QR below to read the complete analysis.

SCAN THIS CODE



The Terror Twins of CLIMATE AND CONFLICT

- ▶ earthquake diplomacy a double-edged sword, with potential for both progress and risk.

On one hand, it risks inadvertently legitimizing the SAC. On the other hand, prioritizing humanitarianism over a zero-sum conflict could present a golden opportunity. However, crises do not automatically lead to change—only those who seize the moment can shape history.

Strategic action is essential for transforming a disaster into a historical turning point rather than another missed opportunity. Neither an earthquake nor any natural calamity will create change on its own; it is up to people to drive that change. A disaster may open a window of opportunity, a political entry point. Still, if leaders across the spectrum refuse to act, Myanmar's society will remain trapped in a vicious cycle of hardship.

Reference

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2

30 Minutes with the ISP

Armed Struggle – Will It Lead to Political Resolution?

Following Operation 1027 in October 2023, the Myanmar junta suffered major reverses, while resistance forces gained an unprecedented battlefield advantage in the country's modern history of resistance. Yet, unable to convert these gains into a decisive political turning point, the resistance soon faced a counter-offensive, as the military adopted new tactics to retake several lost towns. Against this backdrop, ISP-Myanmar examined the crucial challenge of turning military gains into political outcomes. The concept note on this theme became the most-read publication, and the corresponding *30 Minutes with the ISP* episode was the most-watched program of the year.





ARMED STRUGGLE WILL IT LEAD TO POLITICAL RESOLUTION?

September 2025



CONCEPT NOTE

A series of territorial gains by the resistance forces following Operation 1027 caused a major stir in the recent past. The Spring Revolution began in 2021 as a largely peaceful uprising. But over time, armed struggle eclipsed all else. News media in exile too became dominated by military headlines: war seemed to be everything.

Yet military victories do not by themselves translate into political success, let alone lasting peace. Political success rests on turning victories into institutions. Armed struggle is only the means, not the end. As the cliché has it, “Politics is war without bloodshed, and war is politics with bloodshed.”

The public has already carried its share of the burden: marching, voting in landslides, and keeping the revolution alive with resources and resilience. They launched the Civil Disobedience Movement (CDM), boycotts, pot-banging protests, and silent strikes—and forgave missteps along the way. The shortfall is not in popular support but in leadership’s failure to turn it into political gains. The regime, meanwhile, has endured its gravest setbacks in decades. Operation 1027 left it humiliated and fractured; its cohesion, command, and ideology were all severely challenged. ISP-Myanmar described Naypyitaw at the time as “stormy, hollowed-out, and corroded.” (view 30 Minutes with the ISP Event No. 2, *Naypyitaw-logy: Three Words Characterizing Naypyitaw*)

But the generals are not finished. Junta forces have retaken some strategically important towns, such as Moebye and Nawngkhio, and reorganized themselves under a newly formed State Security and Peace Commission (SSPC). It is also pushing ahead with plans to hold elections before the year’s end. Resistance forces, meanwhile, are preparing to disrupt the vote—though their response is likely to be more tactical than a coordinated political offensive.

The critical question is how far past military victories can be converted into political gains. Success lies in transforming battlefield momentum into institutionalized achievements, rather than letting victories dissipate. And as Myanmar's geopolitical landscape shifts, the connection between military gains and political outcomes will remain the defining issue.

The real test lies ahead. Can the resistance turn battlefield momentum into political achievement? Can fleeting victories be institutionalized into lasting gains? For Myanmar, the struggle is no longer only on the front lines but in the conversion of war victories into politics. ■



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30 MINUTES
with the **ISP**

ARMED STRUGGLE WILL IT LEAD TO POLITICAL RESOLUTION?



Htet Shein

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist



Khin Khin

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist



Naing Min Khant

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist



Su Lin Han

Emerging Researcher
Communications
Host

This event was held on August 16, 2025, exclusively for ISP Gabyin Community members. The recorded video of the event is available on ISP-Myanmar's YouTube Channel with English subtitles. DVB broadcasts the recorded video of the live event on its TV and social media channels regularly on Mondays and Wednesdays.



Su Lin Han

Emerging Researcher
Communications Department
Host

Hello and welcome, Gabyin members, to today's *30 Minutes with the ISP*. I'm Su Lin Han, your host for this session. Today's topic is "Armed Struggle— Will It Lead to Political Resolution?" Joining us are emerging researchers from ISP-Myanmar's Conflict, Peace, and Security Studies: Htet Shein, Naing Min Khant, and Khin Khin. To start us off, I'd like to invite our first panelist, Htet Shein, to begin the discussion.



Htet Shein

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist

First of all, I'd like to thank all of you for joining today's *30 Minutes with the ISP*. Today, we reflect on the four years since the military coup. After the coup, people resisted the junta through various non-violent means: marches, protests, and other civil disobedience movements. Later, armed resistance became an alternative strategy, confronting the

junta with increased strength. Within two years of the coup, numerous armed groups had sprung up across the country. In that time, they built their strength, and clashes between the resistance and the junta took place nationwide. Then came Operation 1027, which brought significant military successes. Throughout this period, armed struggle became a central means of opposing the junta. Those fighting on the frontlines were often portrayed as heroes. Both local and international media were dominated by reports of warfare; the war was the central theme of everything.

So today, we should ask: have these military gains translated into political outcomes? How important is it to transform military gains into political achievements? How do civil wars typically conclude across different countries? And do those endings actually deliver the fair outcomes that people desire? What results have we seen in Myanmar's own history? And in today's context, what scenarios or possibilities are unfolding? We'll discuss all this in three parts in today's program.

First, I want to briefly discuss today's situation. After Operation 1027, resistance groups achieved many military successes and expanded their territories. Such outcomes

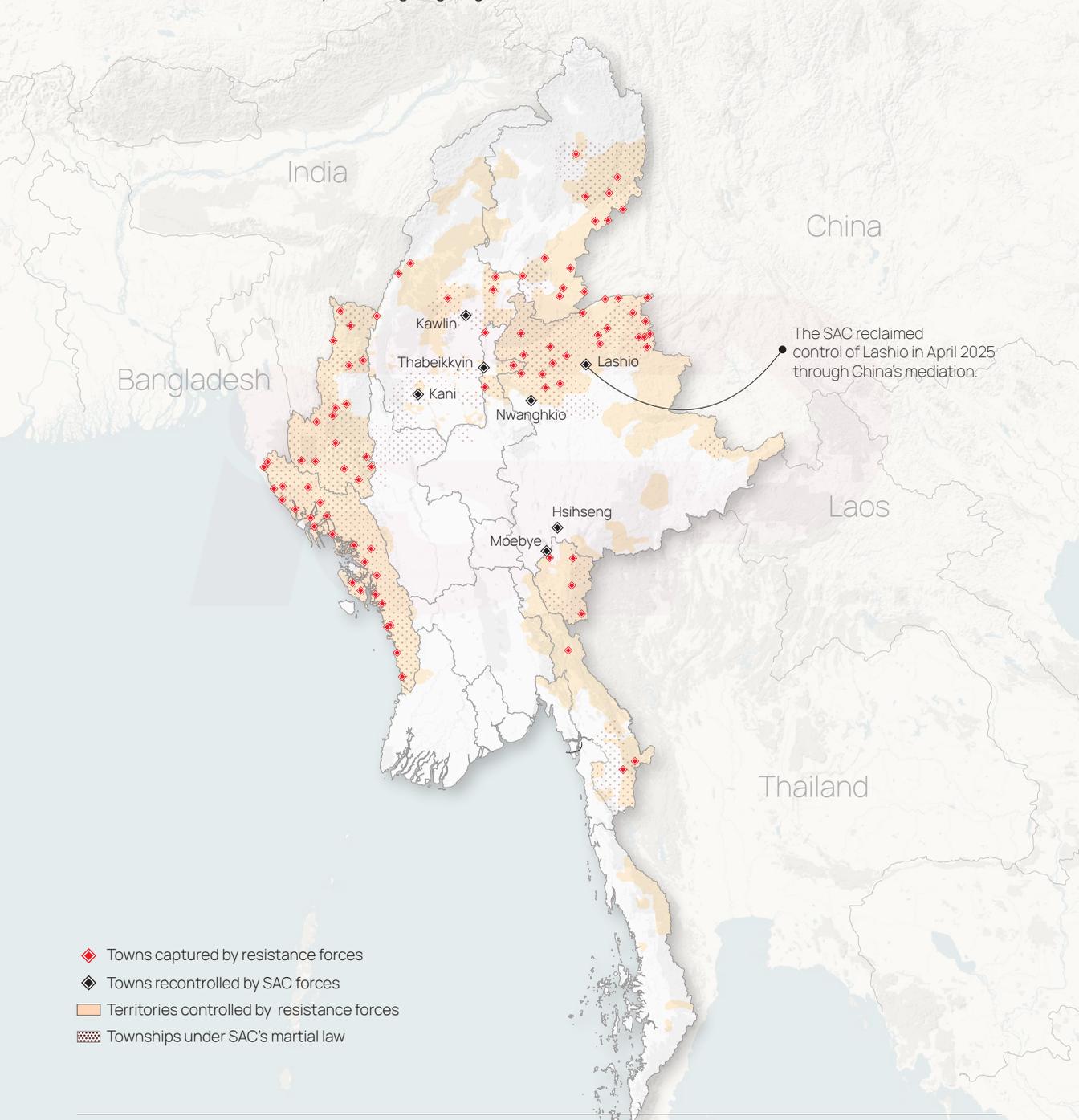
► came at the cost of enormous sacrifice from fighters on the ground. As a result, the groups leading these offensives gained recognition and expanded control. The public praised them, saying: “Any freedom won is freedom for all.” In these areas, they also initiate both governance and economic activities. This is most evident in resource-rich areas like Mogoke and Thabeikkyin. Despite these offensives, there were no significant political agreements between the leading armed groups, especially those in northern Myanmar, and the National Unity Government (NUG). Their cooperation did not go beyond jointly fighting the regime as a common enemy. Meanwhile, the junta itself was collapsing in terms of military, moral, ideology, and technologies. Within four months of Operation 1027, the junta lost around 40 towns, including its Northeastern Command. But at that time, the junta received help from China, a powerful neighbor. With China’s backing, they regained control of Lashio from the resistance. Now, they’ve also managed to retake some strategically important areas. At least seven towns have been retaken in Mandalay, Shan, and Sagaing. Though still few in number, it marks a turning point. The junta has also reformed itself as the State Security and Peace Commission (SSPC) and is preparing for elections. This, too, can be seen as a political offensive.

So overall, despite their battlefield success, the resistance has not been able to translate their military victories into political achievements. Yet, one could argue that the revolution is not over yet; new offensives may still strike the junta. Some will say there are wins and losses in battles, but overall, a war is taking shape. Despite that, it is clear that the junta gains more manpower through conscription, receives weapons and technology from neighboring powers, and enjoys geopolitical cover. So, unlike before, it will be much harder to hit the junta where it truly hurts. But that does not mean the resistance will collapse. It means the armed conflict has reached a strategic stalemate where neither side can claim a decisive victory. At this stage, politics must be considered alongside the conflict. This is my overall analysis of the current situation. Please continue with the second part of the discussion, Khin Khin.

● Significant Territories Under The Resistance's Hand

ISP-M2025-109

Following Operation 1027, resistance forces captured significant territory, leading the State Administration Council (SAC) to lose control of **98 towns** and several key outposts. In response, the junta, now operating as the State Security and Peace Commission (SSPC), imposed martial law in **63 townships**. With newly acquired troops and technology, the SSPC has launched counteroffensives, reclaiming **seven towns** across Shan State, Mandalay, and Sagaing Regions to date.

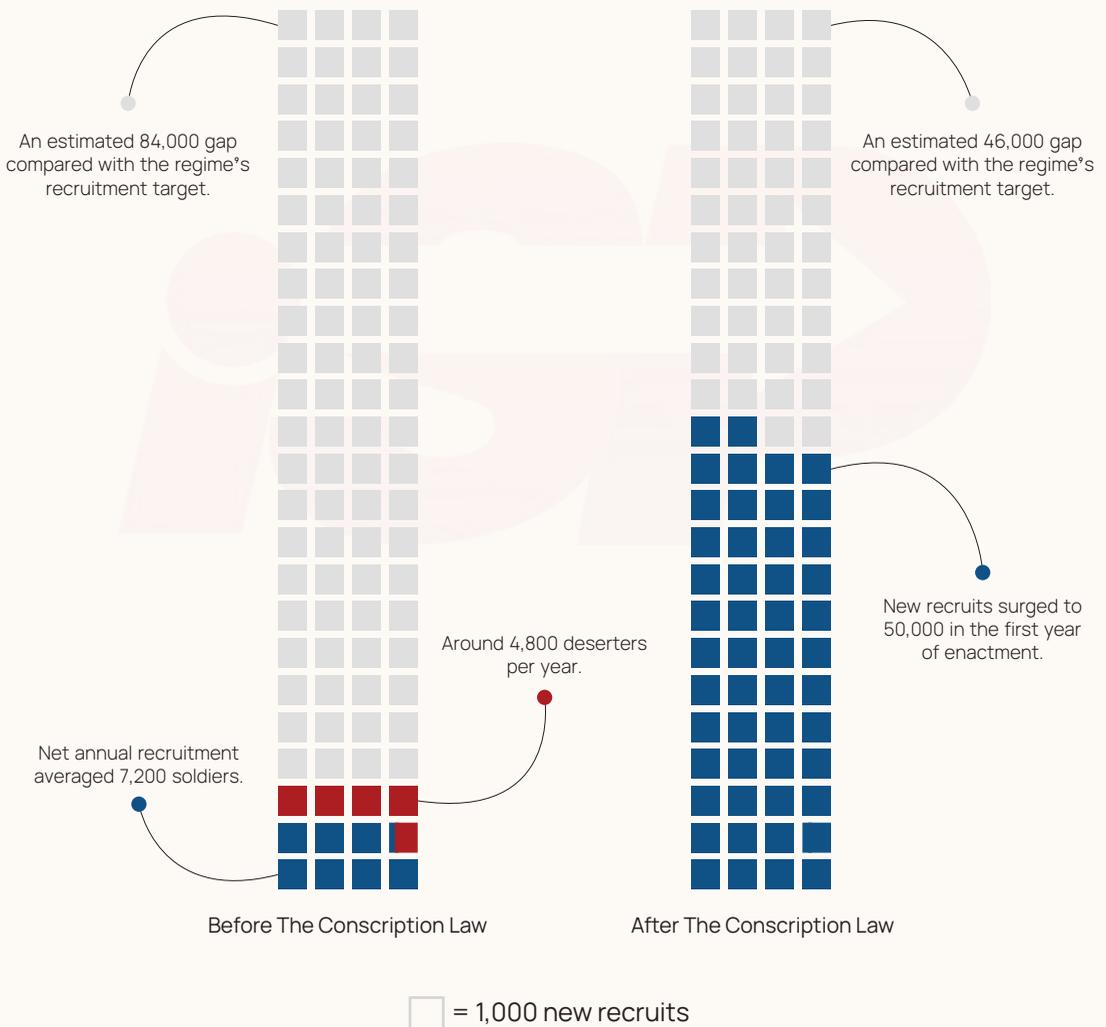


Data as of August 15, 2025, is based on ISP-Myanmar's research. It may vary from other sources due to differences in methodology and data availability.

● Junta Troop Numbers Swell Sevenfold After Conscription Law

ISP-DM2025-170

The regime once aimed to enlist **96,000 recruits** annually—10 recruits per battalion, or 8,000 across all battalions each month. In practice, between the years 2000 and 2020, it managed only 12,000 annually on average, with a net recruitment of just **7,200** after desertions. That changed abruptly with the enactment of the People’s Military Service Law: in its first year alone, **more than 50,018** were drafted, nearly **seven times** the previous rate.





Khin Khin

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist

In this second part, I'll approach the question of how civil wars end by drawing on international examples and looking at it from a research perspective. Civil wars and armed conflicts are not unique to Myanmar; they happen worldwide. What makes Myanmar's case different is its unusually prolonged and complex nature. We can describe it as a multi-

party civil war involving numerous actors. This point is crucial because the more groups there are, the more diverse their political goals, positions, and strategies become.

When we study how armed conflicts come to an end, there are generally three main outcomes: (1) Rebel Victory, (2) Incumbent Victory, and (3) Negotiated Settlement. But in practice, the outcomes are rarely this simple. Let's take a look at this chart and consider the first scenario: a Rebel Victory. One possibility is that a single resistance group achieves complete victory and control over the entire country. However, given Myanmar's historical and current circumstances, we assess this outcome as highly unlikely. A second possibility is that an alliance front of resistance groups could prevail together. For those strongly opposed to the dictatorship, this would be regarded as the most desirable outcome. But we view it more as a fascination than a reality in Myanmar's context. Practically speaking, such a victory is very difficult to achieve. The third scenario is a failed state or state collapse, where the state disintegrates entirely and rebel forces prevail by default. As long as the junta keeps receiving support from powerful states, like China, India, and Russia, we assess that this outcome too remains unlikely, as Htet Shein noted. We have seen such cases in countries like Syria and Yemen.

● How Armed Conflicts Usually End?

ISP-DM2025-171

Multi-party civil wars tend to end in one of three ways: a rebel victory, an incumbent victory, or a negotiated settlement. The first two are decided on the battlefield; the third at the negotiating table. Settlements may take either a military nature or a political nature. Which model prevails depends on the actors involved, the issues at stake, and the political tide.

- 1 A single armed group achieves decisive military victory.
- 2 Alliance front of resistance groups secures victory.
- 3 Military victory emerges amid state collapse and institutional breakdown.

Model (1)
**Rebel
Victory**

Model (3)
**Negotiated
Settlement**

Model (2)
**Incumbent
Victory**

- 1 The incumbent defeats all resistance forces.
- 2 The regime wins sequentially against fragmented resistance groups.
- 3 Resistance collapses, leading to swift and uncontested incumbent victory.

- 1 A comprehensive peace process outcome.
- 2 Bilateral negotiations.
 - Ceasefire negotiation (military negotiation)
 - Power-sharing arrangement (administrative or political negotiation)

But we must note that Myanmar's military and political conditions are quite different from those countries. We also assess that the second scenario, an outright military victory by the junta, is also highly unlikely in Myanmar. And the possibility of completely defeating each armed group individually also appears very unlikely, considering the prolonged conflict. Finally, scenarios where some groups collapse or merge into others are also difficult to foresee in Myanmar's context. So, looking at the research data overall, a decisive victory by the ruling junta appears very unlikely in Myanmar.

Last but not least, let's consider the third type of outcome: a negotiated settlement. In Myanmar, this phrase itself has often carried a sense of political red line. Such a process can take many different forms, depending on the context, actors, background conditions, and balance of power. Scholars often classify these into several sub-categories. But we'll simply explain it in just two broad types. The first is a comprehensive peace agreement, leading to political settlements and security sector reforms. For the nation, that'd be like hitting a jackpot, but realistically speaking, it's easier said than done. The long but failed NCA (Nationwide Ceasefire Agreement) is a cautionary example. Especially in a country like Myanmar, with such a long history of armed conflict, with numerous armed groups and differing political positions,

and with diverse ethnic and political grievances, we assess that such a comprehensive peace process would be very challenging. The second type tries to resolve issues group by group. It can differ depending on whether they focus on merely military, political, or administrative arrangements.

For example, some ceasefires may only be temporary without addressing any politics. This was the pattern seen with the KIA before 2010. Sometimes a ceasefire was apolitical and tied to business deals under 'regional development.' It's just like former Gen. Khin Nyunt's model: "surrender the path of armed struggle and return to the legal fold". But such arrangements really just favor the junta. Groups that accept the deal become the Border Guard Forces (BGF), as seen in Myanmar. Another type is granting significant administrative authority. This is done in Myanmar through the framework of Self-Administered Zones. Internationally, some cases went further, granting both administrative powers and partial federal arrangements. We can see certain arrangements in Aceh, Indonesia, or in Nepal, for example. Such models were also studied by different groups during the NCA process. But they were never practiced. In summary, it is hard for Myanmar to imagine only one model or single formula succeeding. With that, I'll hand over to Naing Min Khant for the next part.



Naing Min Khant

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist

In this final section, I would like to discuss my assessment of the most likely outcome for our country. But before that, let's reflect on some of our country's basic historical patterns. Looking back through history at times of popular uprising, the people always took part fully, pushing and resisting together. In elections, they voted in

overwhelming numbers for landslide victories. In the armed revolution, too, they gave support from all sides. Across generations, we can say that people have fulfilled their responsibility. Even when mistakes or setbacks occurred, people did not harshly blame their leaders. Instead, they understood and forgave them. Yet throughout history, leaders often rode the wave of public support but failed to translate it into meaningful political gains for the people. Rarely did they transform it into true political progress. Now, as Htet Shein explained earlier, Myanmar's armed resistance has reached its strongest state when compared to the past movements. Even neighboring countries and the international community acknowledge that the Myanmar Armed Forces now face unprecedented pressure. However, this success must be translated into tangible political outcomes. In other words, military achievements must be capitalized into political gains. Basically, these victories need to become institutionalized gains.

But, as Khin Khin discussed earlier, if we look back at Myanmar's history, most disputes were settled through formal documents, agreements, and treaties. Yet, when we examine the outcomes, expectations, and results, they rarely match. They rarely succeeded. From the Panglong Agreement to the NCA, we are still

► far from a concrete solution. Most peace processes relied on informal talks, based solely on trust, understanding, and fragile power-sharing arrangements. But if we look at them constructively, we can see that foreign countries did not step in to impose their own solutions. Myanmar resolved its domestic issues through its own ways and means. However, the situation has shifted significantly. Today, Myanmar's conflict actors are unable to solve problems on their own. That is why China has stepped in, pushing for solutions that suit its own interests. That's just a bitter reality to resist. If the conflict actors in Myanmar fail to grasp this reality, it will be like sleepwalking, not knowing where they are headed, only to wake up and find themselves being used at the will of a great power. That would be a grave danger.

Currently, all sides are striving to maximize their own interests. The SSPC, formerly known as SAC, has used military, political, and diplomatic means to secure what it wants. The resistance has also committed all its resources to shaping the desired conditions. But for a real political breakthrough, the current military gains must be used like a political tool to create a tangible, institutionalized political shift. Therefore, it is important and pragmatic to turn these military gains

into an institutionalized political shift. And when we speak of political shifts or outcomes, multiple interpretations and approaches can be applied. Looking at Myanmar, a sudden, overnight change is unlikely. It is a situation where we must build and change incrementally. And this gradual path is the more realistic possibility. However, if we fail to create such conditions, the people will continue to struggle with hardship. I'd like to conclude the initial part of our discussion with this remark.



Su Lin Han

Emerging Researcher
Communications Department
Host

Thank you, our panelists,
for your presentations. We'll now
move on to the Q&A session.
We've gathered some questions
in advance from our Gabyin members.
We've combined them into two
questions to discuss today.
Here's the first question:

Between 2010 and 2020,
efforts were made to push
for a political reform. But
when the regime seized power
again, all progress collapsed.
So, how can we ever trust
a regime that keeps destroying
what has been achieved?



Htet Shein

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist

That's right. If we look at history, it's understandable to say that the regime's political intentions cannot be trusted. In times of intense conflict, mistrust between both sides is natural. And this isn't unique to Myanmar—any civil war, anywhere in the world, shows the same pattern. That's why, when it comes to negotiations, we often see powerful

countries or international organizations step in as mediators. However, there's a perception that the side initiating talks does so from a position of weakness. So, as I mentioned earlier, transforming military results into political outcomes is just one of the methods. It's not the sole path, and it's certainly not the final destination. In negotiations, the stronger side typically holds more influence and bargaining power. This is exactly why it is important to realize how the already achieved military gains can be strategically used as bargaining power in producing political outcomes. And for that, what matters is how strategically we prepare and plan in advance.

What role do neighboring countries play as conflicts move toward political resolution?



Su Lin Han

Emerging Researcher
Communications Department
Host

Thank you for the insight, Htet Shein.
I'd like to continue with the second
question:



Khin Khin

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist

According to research, neighboring countries want Myanmar's conflicts to de-escalate. However, many view de-escalation solely through economic incentives. For example, in northern Shan State, the junta has launched offensives. These offensives occur along trade routes, which favors China. Similarly, in Karen State, if offensives target the

Asian Highway, which is an economic incentive for Thailand. So, in our assessment, in places like Chin State or Rakhine State, the junta is likely to link its offensives to neighboring countries' trade routes and conduct operations accordingly. Thank you.



Su Lin Han

Emerging Researcher
Communications Department
Host

Thank you for your response, Khin Khin. Now, we'll take one question and one comment from our participants. We'll turn on the mic for our Gabyin member. Please go ahead with your question or comment.

As the earlier speakers have discussed, relying only on the military path has brought us no solution, even after over 70 years. We have not seen clear success on one side, nor outright victory on the other. So if the military path alone is not the answer, what would be the strategic way forward? I'd like your thoughts on this.



Htet Shein

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist

Given the time limit, I'd like to provide a brief answer based on our study.

It's true, when we look back at Myanmar's history, we see nearly 80 years of civil war. The struggle has been fought militarily, but no solution has yet emerged. As we discussed earlier, political outcomes are crucial. Whether it is military action,

political action, or public pressure, it is not a matter of using one method alone or switching completely to another. These methods must rather be used strategically, by deciding when and to what extent each should be applied. That's the key point I'd like to emphasize. It does not mean we should abandon armed struggle altogether.

To resolve our problems, we must consider which tools and which methods to use. Our toolbox should carry both hammers and saws. If we only hold a hammer and try to hit everything, nails or wood, it won't solve the whole problem. We need to know when to use the hammer for nails and when to use the saw for wood. Based on the right timing, actors and contexts involved, we need to coordinate multiple approaches. This is because Myanmar's conflict involves numerous actors with diverse objectives. Therefore, it is nearly impossible to achieve a single result through a single path. That is as much as I can answer within the available time. Thank you.



Su Lin Han

Emerging Researcher
Communications Department
Host

Thank you, Htet Shein, for sharing your thoughts. Now, I'd like to open the floor for comments. Participants, you're welcome to share your views on today's discussion. We'd love to hear from you. I see one participant with their hand raised. Please go ahead and share your comment on today's session.

My question is about what Naing Min Khant mentioned, "the need to turn military gains into an institutionalized political shift." What exactly does that mean? What kind of model or structure do we call something 'institutionalized'? If you could give a definition and explain its process, that would be even better.



Naing Min Khant

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist

When we talk about institutionalized results, it's really about how to weaponize the military achievements to secure a political solution. As I mentioned earlier, the SAC, or the SSPC, is also making efforts, in its own way, to shape the results it wants. Right now, they're emphasizing the election. On the resistance side, progress is seen both in military

victories and in political dialogue and coordination. There are also military successes on this side. Meanwhile, the SAC is pushing its own election agendas and seeking to secure the outcomes it desires. The resistance must figure out how to leverage and translate their military gains against this. As Htet Shein also discussed earlier, there are many sides to this conflict. There will be different events and different timings. It depends on which strategies are used accordingly. And what I urged for here is to transmit a political shift through these strategies.



Su Lin Han

Emerging Researcher
Communications Department
Host

Thank you for your thoughts, Naing Min Khant. Due to time limitations, we'll conclude our Q&A session here. Before we end, I'd like to ask our panelists—do you have any final points to add on to today's discussion?



Htet Shein

Emerging Researcher
Conflict, Peace, and Security Studies
Panelist

Alright, I will pull out three key points from what we've discussed today to wrap it up. First, as we've already discussed, translating military successes into an institutionalized political shift is crucial. If we fail to do that, those military results may only make political settlement harder for all in the long run. Second, if we really want to move toward



▶ the political results we're aiming for, we need to use a range of tools and approaches, timed and adapted to the situation. That can mean military pressure, popular pressure, international pressure, and so on. These are methods, not end goals, not the final destination; they're simply means along the way. If we wrongly interpreted these means as end goals, it would be like reading a map upside down and hunting for the treasure. Third, we must always ask whether the methods we're using are truly leading us to the political outcome we want. Are they actually bringing us closer to that goal? We need to constantly reflect on this. If not, the military gains and successes we achieve might end up wasted—spent without ever turning into political results. And with that thought, I'd like to conclude today's discussion.



Su Lin Han

Emerging Researcher
Communications Department
Host

Thanks for the insight, Htet Shein. For additional research, you can visit our website at www.ispmyanmar.com or our social media platforms. I'd like to conclude today's program by expressing gratitude to all of you for being here.



3

ISP On Point

“O... Northern Road ...”

Myanmar’s Conflict Resolution that Needs Guardrails and the Future Prospects

Under the theme “O... Northern Road ...” ISP-Myanmar published a trilogy of On Points, addressing the need for guardrails in resolving Myanmar’s conflict and assessing its future prospects. These articles were titled *Subcontracting Sovereignty*, *A Much-Needed Thai Model for Myanmar’s Political Puzzle*, and *Rakhine: A De Facto Rival Power Center*. The assessment concluded that due to diverging political objectives among Ethnic Armed Organizations (EAOs), it remains unlikely that the North-Eastern, South-Eastern, and Western corridors could unify to pressure and overcome Naypyitaw politically, or to envision a new nation based on these three corridors. All three of these initial assessments garnered significant audience interest.





“O’ Northern Road...”

SUBCONTRACTING SOVEREIGNTY

Myanmar’s Conflict Resolution that Needs Guardrails
and the Future Prospects

ISP On Point No. 24
May 2025



“O’ Northern Road...”¹

Subcontracting Sovereignty

Myanmar’s Conflict Resolution that Needs Guardrails and the Future Prospects²

“Will we reach today?

Tomorrow?

Don’t wait (for me)...”

— Sai Hsai Mao. (1980). Muse-Namkham Road [Song]. *On My Dear Sein*.

■ Events

The Myanmar National Democratic Alliance Army (MNDAA) withdrew from Lashio between April 21-23, 2025. Lashio, the capital of northern Shan State and the base of the Northeastern Regional Military Command (RMC), was captured by the MNDAA last August. The MNDAA removed its flags and Special Region (1) flags raised in Lashio. Guo Jiakun, spokesperson for China’s Ministry of Foreign Affairs, formally confirmed that this withdrawal was possible thanks to Chinese mediation. During the Kunming Talks on April 28-29, mediated by China, the SAC demanded

that the Ta’ang National Liberation Army (PSLF/TNLA) withdraw from five towns they captured. The following press conference on May 4 by the PSLF/TNLA stated, “No agreement was reached.” Another round of talks is planned in August. On May 1, the Three Brotherhood Alliance (3BHA) announced an extension of its unilateral ceasefire for another month to continue the earthquake relief efforts. The military junta also declared on May 6 that it would extend the temporary ceasefire until May 31.

1 The phrase of this OnPoint’s title “O’... Northern Road...” is taken from the Muse-Namkham Road [song] composed and sung by famous Shan singer Sai Hsai Mao.

2 ISP-Myanmar plans to publish a trilogy on this topic: Myanmar’s Conflict Resolution that needs guardrails and the future prospects. This OnPoint is the first of the three.

■ Preliminary Analysis

The Lashio incident marks a significant turning point not only for the Myanmar National Democratic Alliance Army (MNDA), which had to relinquish the city, but also for China's initiative and the history of Myanmar's conflict resolution, since a critical shift at the time of ceasefires in 1989. In 1989, led by then-Brigadier General (later General) Khin Nyunt, ceasefires were negotiated with two ethnic armies that had broken away from the Communist Party of Burma (CPB): the MNDA (April 14) and the UWSA (May 18). Following the ceasefire with Northern groups, around 17 major armed groups, including the Pa-O National Organization (PNO), Kachin Independence Organization (KIO), and New Mon State Party (NMSP), also entered into ceasefires with the then military regime. For ethnic armed groups, these agreements meant they could retain their weapons and control designated territories without disarmament. Negotiations included diverse issues from establishing checkpoints to launching liaison offices.

Moreover, the ceasefire groups freely engaged in activities ranging from mining, logging, and tax collection to illicit businesses like drug trafficking. New troop conscripts were allowed, and all conflicting parties agreed to inform in advance when troops pass through another's territory. While these arrangements halted major aspects of armed conflict, political talks were excluded. Political dialogue was only permitted at the National Convention,

which was dictated by successive military regimes, such as the State Law and Order Restoration Council (SLORC) and the State Peace and Development Council (SPDC).

Most Myanmar people and international analysts have focused primarily on the 1988 Democracy Uprising, the 1990 multi-party elections, and Aung San Suu Kyi as key movers for Myanmar politics. These issues are undeniably significant due to the immense public support, legitimacy, and the heroic sacrifices made by people driven by their democratic aspirations. However, what truly shaped Myanmar's conflict, actors, and political economy was the 1989 ceasefire negotiations. In practice, consecutive military regimes utilized a containment strategy to prevent battling on two fronts. They achieved ceasefires with majorities of ethnic armed groups, enabling the regime to concentrate on suppressing urban democratic uprisings. As a result, armed conflicts were stopped in most regions except in Karen State, enabling the SLORC/SPDC military regimes to harshly repress urban democratic movements. This suppression peaked at the 2007 Saffron Revolution and the enactment of the 2008 Constitution, which formalized a quasi-civilian framework. Some ethnic armed groups were coerced to transform into Border Guard Forces. The ceasefire agreements fundamentally gave rise to a "ceasefire crony capitalism," marked by the arbitrary extraction of natural resources and

- ▶ widespread land grabbings across Myanmar, leading to severe social disruption. The 1989 ceasefire framework was merely a domestic model, negotiated among conflicting parties. However, this model drove to weaken the state, fostering an illicit economy that flourished at the expense of the people and the country's natural resources, which suffered immense losses.

In the 2021 Spring Revolution, the SAC's strategy of avoiding a two-front warfare failed. The SAC could neither divide nor contain the coordinated resistance between the newly emerged Bamar resistance forces, such as the National Unity Government (NUG) and People's Defense Forces (PDFs), and the Ethnic Resistance Organizations (EROs); the containment strategy proved ineffective. From this perspective, the recent emerging "Lashio model" appears to pave the way for reviving the containment approach through ceasefires, potentially giving the SAC a strategic advantage. However, unlike the 1989 ceasefire model negotiated among conflicting parties, the current Lashio model was driven by China's proactive mediation and pressure. Under the model, the junta will take over urban administrative responsibilities, while the MNDAA shares its rule, retaining control over rural areas, establishing a form of joint governance that could persist for some time. This arrangement may also enable the reopening of trade routes in northern Shan State. According to a BBC Burmese report citing a source close to the Chinese government, this new setup resembles the Mongla model of the



The MNDAA would likely desire China's guarantees and its capacity to monitor and mediate. If the Myanmar junta accepts this arrangement (orderly return of an occupied territory without a fight) managed by a superpower neighbor, it could be interpreted as an unprecedented approach in Myanmar's conflict management: subcontracting sovereignty to an external actor, China.

▶ National Democratic Alliance Army (NDAA) in Special Region 4 (Mongla) in eastern Shan State. For such a joint governance model to work, the MNDA would likely desire China's guarantees and its capacity to monitor and mediate. If the Myanmar junta accepts this arrangement (orderly return of an occupied territory without a fight) managed by a superpower neighbor, it could be interpreted as an unprecedented approach in Myanmar's conflict management: subcontracting sovereignty³ to an external actor, China.

In fact, the United Wa State Army (UWSA) offered this Lashio model before the MNDA captured Lashio City in 2024. The UWSA had already sent thousands of troops from its southern areas to Lashio, stating, "We're not here to fight but to protect. The Wa forces only wish to act as a peacekeeping 'blue helmet' force." However, the SAC was suspicious of the UWSA's maneuver to control Hopang without firing a shot. Citing this as an example, the junta rejected the UWSA's offer, expressing distrust by saying, "The Wa's 'temporary' presence can't be trusted; they won't leave eventually."

Consequently, the UWSA's "blue helmet" forces did not literally end up controlling

Lashio. Nevertheless, it is understood that the UWSA evacuated dozens of junta military officers and staff trapped in the Northeastern Regional Military Command headquarters during the fighting. After Lashio and the Northeastern Regional Military Command (RMC) headquarters fell under MNDA control, the Lashio model re-emerged in this new form. Unlike earlier proposals where the United Wa State Army (UWSA) would take on a "blue helmet" peacekeeping role, this model is managed directly by China. China's spokesperson boasted that both the SAC and the MNDA expressed gratitude for China's constructive role in maintaining peace and stability in northern Myanmar. China will continue to advance the Kunming peace talks and remain committed to supporting conflict cessation and peace negotiations to ensure peace and stability along the China-Myanmar border.

In reality, the Lashio model can be seen as a strategy of the SAC weaponizing its own vulnerability—the risk of Myanmar becoming a failed state and collapsing—as a tool by courting China to help prevent the center from falling. For China and other neighboring countries like Thailand and India, which link Myanmar's stability to ▶

3 The concept of "subcontracting sovereignty" is also used in academic discourse, referring to a state's delegation of core sovereign responsibilities to private entities. This is particularly evident in sectors such as security and military affairs, where private companies or organizations are authorized to carry out state functions. In the case of small or weak states, geopolitical pressures may compel them to relinquish certain sovereign roles. Such arrangements raise concerns over the erosion of state authority, reduced accountability and oversight, instability, and the commodification of military power.

Verkuil, P. R. (2009). *Outsourcing Sovereignty: Why Privatization of Government Functions Threatens Democracy and What We Can Do About It*. Cambridge University Press.

● Operation 1027 and the UWSA's Stance

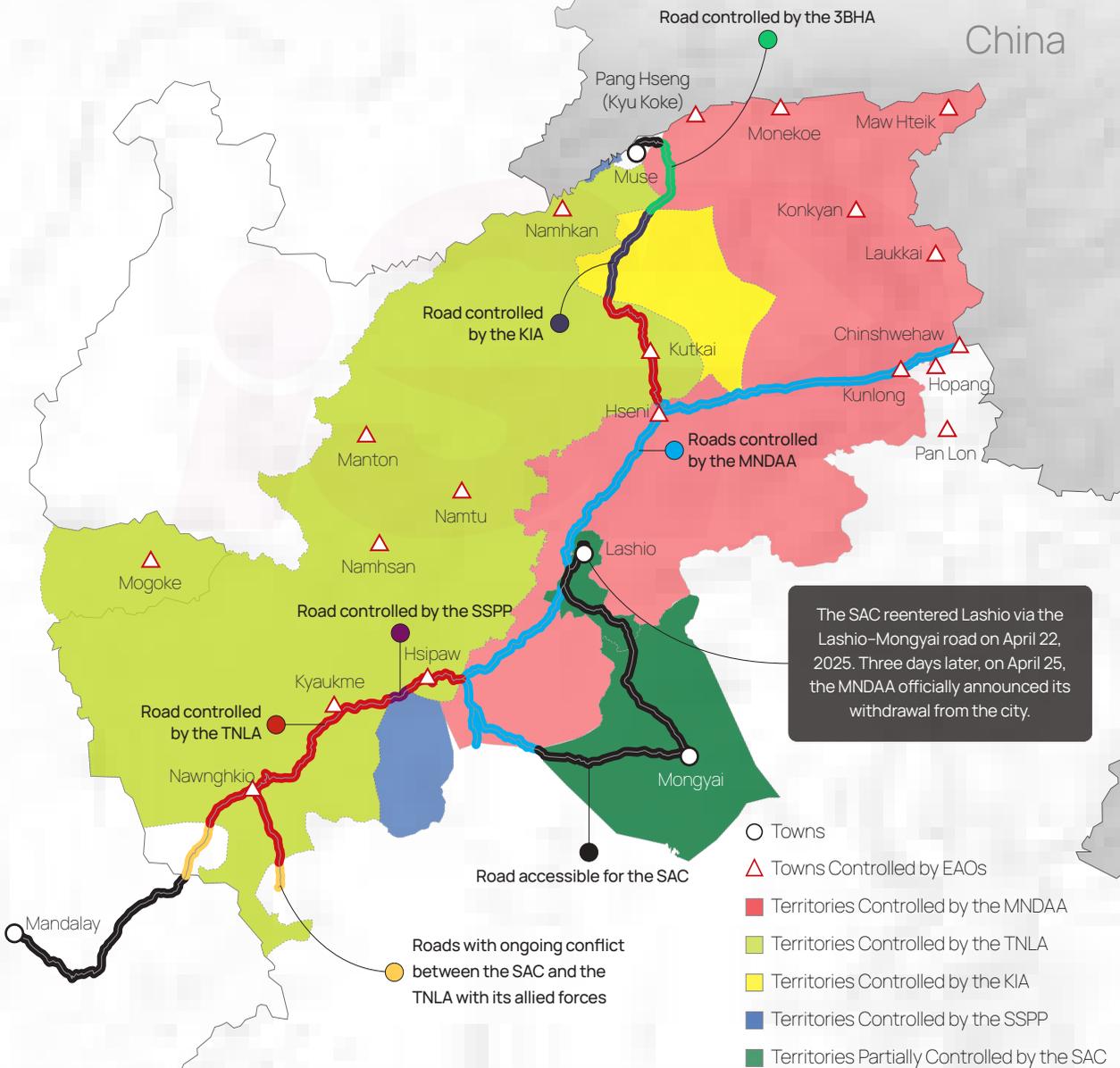
In late October 2023, during the initial phase of Operation 1027, the Three Brotherhood Alliance (3BHA) seized Hopang town, which was later handed over to the UWSA. UWSA forces entered and temporarily administered the town. Following negotiations with the State Administration Council (SAC), the SAC officially transferred control of both Hopang and Panglong towns to the UWSA in early January 2024, without a single shot being fired. In July 2024, the UWSA consolidated Hopang, Panglong, Namtit, and Narwee towns into a new administrative unit known as Hopang District, initiating a fresh governance structure. Although the SAC reappointed Nyi Nat as chairman of the Wa Self-Administered Division's administrative body, control was later shifted to the Pangsang administration, prompting dissatisfaction from the SAC. As the North Eastern Command and Lashio came under threat, the SAC blocked UWSA forces, who had arrived in Lashio claiming they intended to minimize casualties and offer protection, from proceeding further.

On the other hand, after its takeover of Hopang and Pan Lon, the UWSA issued a statement on July 29, 2024, reaffirming its commitment to a neutral policy regarding military conflicts among other organizations and refusing to exacerbate further warfare. The UWSA stated that this position reflects the interests of all ethnic groups in Wa State, as well as those throughout Myanmar. It warned that ongoing armed conflict has pushed the country to the brink of collapse, sparked an economic crisis, and left the public in despair. Prolonged fighting, it added, risks deepening divisions among ethnic and social communities, intensifying animosity, and inflicting lasting psychological harm. The UWSA stressed that the public's desire for peace must not be ignored, urging all parties to avoid acting out of self-interest at the expense of the people's well-being. It called for peaceful resolution through dialogue and negotiation, reaffirming Wa State's commitment to pursuing peace.

Minutes from a meeting between Chinese Special Envoy Deng Xijun and senior UWSA leaders, leaked in October 2024, made the UWSA's stance clear. Notably, UWSP/UWSA Vice-Chairman Zhao Guoan informed Mr. Deng that, following China's guidance, the UWSA would refrain from involvement in military conflicts.

Control of Lashio and Surrounding Trade Routes Post-April 2025

On April 28, 2025, the State Administration Council (SAC) regained control of Lashio, a town previously held by the Myanmar National Democratic Alliance Army (MNDAA). However, several Ethnic Armed Organizations (EAOs) continue to control key roads along the Myanmar–China border trade route. In particular, the Three Brotherhood Alliance (3BHA), the Kachin Independence Army (KIA), and the Shan State Progressive Party (SSPP) each maintain control over segments of the Mandalay–Lashio–Muse road.



Data as of May 8, 2025, is based on ISP-Myanmar's research and may vary from other sources due to differences in methodology and data availability.

► broader regional security, the collapse of Naypyitaw is a major concern. There is a growing concern among neighbouring countries over the possible emergence of "mini-states or quasi-states" in a fragmentation scenario—as noted in ISP's OnPoint No. 19 from December 2023, "Operation 1027: The Need for New Political Imagination and Pragmatic Strategy", if the opposition forces fail to fill the resulting power vacuum after the fall of the center. Consequently, the Chinese-initiated Lashio model has emerged as a means of scaffolding Naypyitaw, reluctantly embraced as a necessary compromise, a case of swallowing the bitter pill. Just as putting out the fire in a burning house takes precedence, Myanmar's stability and security are integral not only to China's geopolitical interests but also to preserving its international image as a superpower capable of managing crises in its own neighborhood. As the ISP-Myanmar noted in OnPoint No. 17 (published in November 2023, "Operation 1027: Will All Roads Lead to Laukkai or Naypyitaw?"), "significant shifts often occur rapidly when China's interests in Myanmar reach a pivotal point." This assessment remains relevant today. In the current Lashio model, the SAC resembles someone who sets their own house on fire, only to be saved by neighbors rushing in to extinguish the flames.



The Lashio model can be seen as a strategy of the SAC weaponizing its own vulnerability—the risk of Myanmar becoming a failed state and collapsing—as a tool by courting China to help prevent the center from falling.

■ Scenario Forecast

The Lashio model seems to exemplify China’s approach to facilitating a “soft landing” for Myanmar’s crisis—an idea emphasized by Chinese Foreign Minister Wang Yi during the Lancang-Mekong Cooperation Foreign Ministers’ Meeting on August 16, 2024.

However, if the SAC permits a China-sponsored model like the “Lashio model”—which effectively subcontracts sovereignty—to take root and stabilize, a critical question emerges: could similar arrangements arise in other conflict-affected areas? This includes towns under TNLA control or key border towns such as Myawaddy and Kawkareik along the Myanmar-Thailand frontier—either under

China’s direction or through the mediation of neighboring countries like Thailand or India. This possibility calls for careful deliberation. If such scenarios materialize, they would mark a sharp departure from the 1989 ceasefire framework, potentially reshaping Myanmar’s conflict dynamics, political economy, and geopolitical landscape. While the 1989 ceasefires led to a weak state, a post-Lashio model era could signify a deeper slide into diminished statehood.

Another possible scenario concerns the ultimate goal of the Lashio model and where it might lead beyond immediate conflict de-escalation. Our ISP OnPoint No. 21: “Seeking a Process Strategy for Myanmar: China’s Initiative” (published in August 2024) has examined this scenario previously. It noted, there is “a vacuum for ▶

ISP ON POINT NO.17



Operation 1027
Will All Roads Lead to
Laukkai or Naypyitaw?

ISP ON POINT NO.19



Operation 1027
The Need for a New Political
Imagination and a Pragmatic
Strategy

▶ domestic and international leadership to effectively implement a 'process strategy' to resolve the Myanmar crisis. China has been using its power to trailblaze through this initiative, like a Burmese saying 'the elephant's steps create a path.'... China's process is based on the SAC's path of convening a General Election and its support 'to realize political reconciliation and resume the process of democratic transition... within the 2008 constitutional framework.' This strategy could be surmised as China's desire to 'hold elections in Myanmar as early as possible, transfer power to a civilian government, prioritize economic development, and implement the peace-making process patiently, while resisting influence from the Western powers'... Nonetheless, the success of any mediation hinges on a strategy that fully involves all stakeholders



While the 1989 ceasefires led to a weak state, a post-Lashio model era could signify a deeper slide into diminished statehood.

and respects the aspirations of the people of Myanmar. Skillful deployment, thorough consultation, and collaboration are crucial for the strategy's success and effectiveness. These elements will pave the way for a workable solution to emerge from the process."

Traditional clay water pots in rural Myanmar are commonly seen providing for public use. Typically resting on a rounded base, these pots are supported by a frame known as *ka-yut-khwe* in Burmese, which acts as a guardrail to keep them steady. Without this frame, the pot would wobble, risk tipping over, and be vulnerable to breaking. Wobbliness lacks grace and would quickly become the talk of the town. Similarly, China's political process in Myanmar requires guardrails: the support of the Myanmar people, inclusion of relevant stakeholders, and alignment with internationally accepted frameworks, such as UN Security Council resolutions and ASEAN's Five-Point Consensus. Without these guardrails, the process risks collapsing or drawing criticism. Only with such grounding can it endure. ■

ISP ON POINT NO.21



Seeking a Process Strategy for Myanmar: China's Initiative



“O’ Northern Road...”

THREADING THE NEEDLE

A Much-Needed Thai Model
for Myanmar’s Political Puzzle

ISP On Point No. 25
JUNE 2025



“O’ Northern Road...”

Threading the Needle: A Much-Needed Thai Model for Myanmar’s Political Puzzle

Myanmar’s Conflict Resolution that Needs Guardrails and the Future Prospect

■ Summary

ISP-Myanmar is publishing a trilogy of preliminary analyses (OnPoint) on “Myanmar’s Conflict Resolution that Needs Guardrails and the Future Prospect.” This analysis is the second part of the trilogy.

The Karen National Liberation Army’s (KNLA) Brigade 4, along with allied People’s Defense Forces (PDFs), seized the Htee Hta Tactical Operation Command (TOC) and the Htee Khee border checkpoint from the State Administration Council (SAC) in Tanintharyi Region from late April to early May 2025. Fierce fighting continues in Kawkareik and Kyainseikgyi townships between SAC troops and the KNLA Brigade 6. The SAC’s efforts to retake the Asian Highway (AH-1) through Operation Aung Zeya have not yet succeeded.

Thailand has shown interest in resolving Myanmar’s conflict, aiming to reopen the Asian Highway and achieve peace. Former Thai Prime Minister Thaksin Shinawatra has emphasized that Myanmar’s conflict should be resolved by its people through dialogue. He facilitated a meeting between the SAC leader and the ASEAN chair. Thailand’s efforts are driven by three primary interests: securing its border, addressing humanitarian concerns, and resolving Myanmar’s armed conflict to achieve sustainable peace. While not explicitly rejecting international frameworks like those of the UN or ASEAN, Thailand is leaning toward China’s approach, focusing on de-escalating conflict through trade, and economic incentives.

However, there are five significant differences between Thailand and China. One of these differences lies in the degree of influence on Myanmar’s conflict actors. Compared to China, Thailand has less influence over the Myanmar military and Ethnic Armed Organizations (EAOs). These differences pose challenges to Thailand’s adoption of China’s model. However, if Thailand can leverage these differences to create a strategy tailored to its context—akin to a Thread-the-Needle act—it could develop an effective approach that balances competing interests. Read this On Point to see more differences between Thailand and China in managing Myanmar’s conflict.

“O’ Northern Road...”¹

Threading the Needle: A Much-Needed Thai Model for Myanmar’s Political Puzzle

Myanmar’s Conflict Resolution that Needs Guardrails and the Future Prospect²

■ Events

In late April and early May, Brigade 4 of the Karen National Liberation Army (KNLA), along with allied People’s Defense Forces (PDFs), seized the Htee Hta Tactical Operation Command (TOC) and the Htee Khee border checkpoint in Tanintharyi Region from the State Administration Council (SAC). The KNLA and PDFs, aligned with the National Unity Government (NUG), say they have been conducting “Operation Sittaung River Basin” since 2023. Operation Aung Zeya, launched by the SAC to retake the Asian Highway (AH-1), has yet to make headway. Fierce fighting continues between SAC troops and sub-units of the Karen National Union (KNU) Brigade 6 in Kawkareik and Kyainseikgyi townships. Against this backdrop, Thailand has been making repeated attempts to mediate the conflict and reopen the highway.

- 1 The phrase of this OnPoint’s title “O’... Northern Road...” is taken from the Muse-Namkham Road [song] composed and sung by famous Shan singer Sai Hsai Mao.
- 2 ISP-Myanmar plans to publish a trilogy on this topic: Myanmar’s Conflict Resolution that needs guardrails and the future prospects. This OnPoint is the second of the three.

■ Preliminary Analysis

Former Thai prime minister Thaksin Shinawatra stated, "I've conveyed to all major powers that Thailand wants to see Myanmar resolve its internal conflicts. Without dialogue, there can be no path toward negotiation." Since April 2025—coinciding with Mr. Thaksin's remarks—military operations have been intensified by the KNLA and its allied forces along the Thai-Myanmar border. After Thailand invited the State Administration Council (SAC) leader to attend the BIMSTEC summit—an effort to reintegrate Myanmar into the regional fold—and Mr. Thaksin brokered a meeting between the junta chief and the current ASEAN chair, Malaysian prime minister Anwar Ibrahim, a series of battles and border outpost seizures followed.

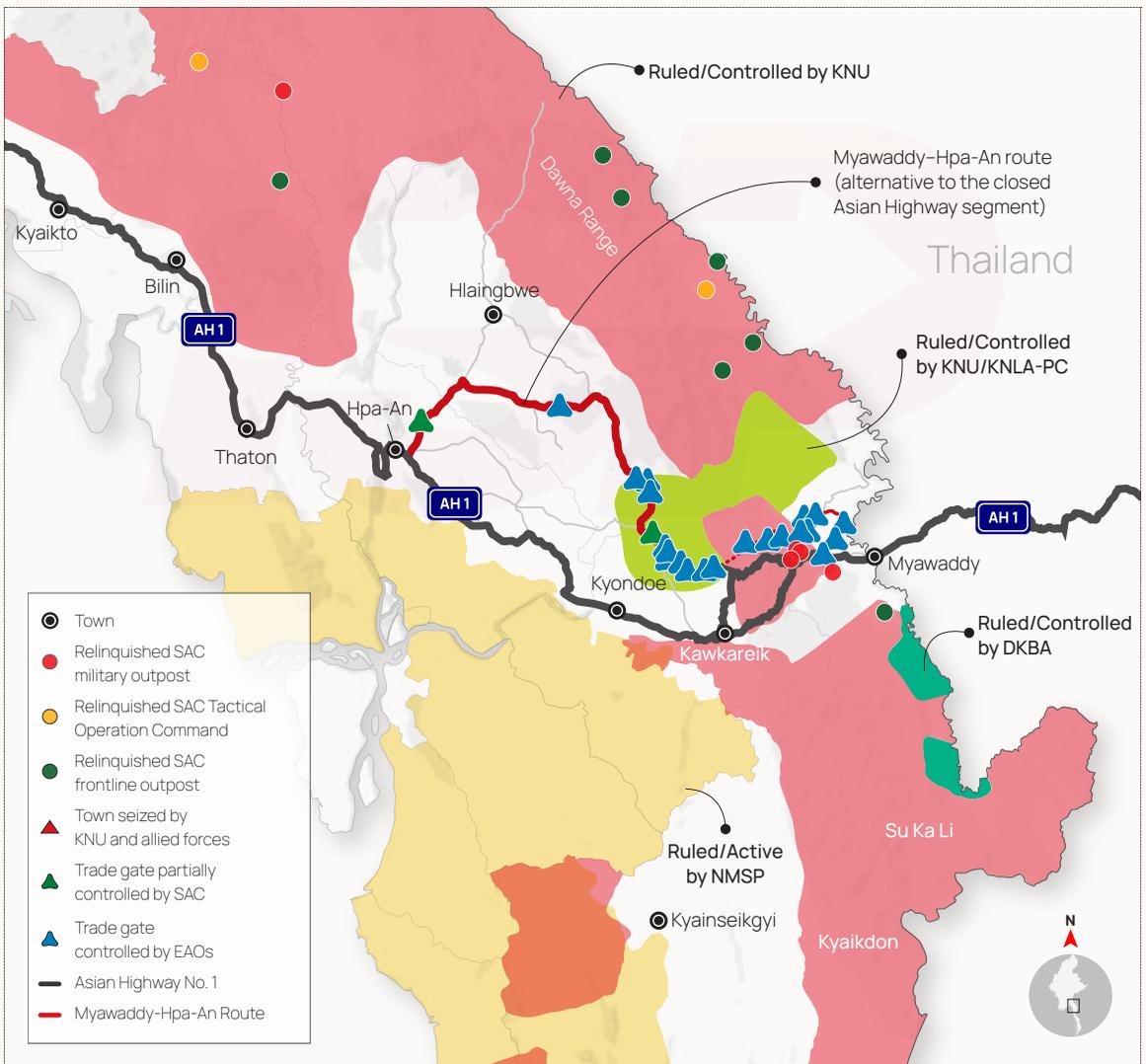
Hosting nearly 100,000 refugees in Thai border camps and approximately six million migrant workers from Myanmar, Thailand bears the brunt of cross-border impacts stemming from Myanmar's armed conflict. Moreover, Washington's new tariffs risk hitting Thailand's economy, especially in the export sector, and Myanmar nationals working in Thailand's manufacturing industries may face significant impacts on their livelihoods (**See Appendix 1 for details.**) Thailand appears to have three primary interests in the Myanmar crisis: (1) securing its border, (2) addressing humanitarian concerns, and (3) resolving armed conflict and achieving sustainable peace in Myanmar. While not explicitly rejecting UN or ASEAN frameworks, Thailand increasingly leans toward China's approach: focusing on resolving conflicts in Myanmar through trade and economic incentives, and integrating de-escalation

of conflict through humanitarian efforts whenever feasible. Over time, other measures for de-escalation tacitly accept the SAC's planned elections as unavoidable, backs a gradual transfer of power to a civilian government, prioritize economic development, implement peacebuilding patiently, and seek to limit broader international involvement—particularly sanctions—except in support of humanitarian aid.

As an initial step toward addressing the Myanmar crisis, Thailand wants to see the reopening of the Myawaddy-Kawkareik section of the Asian Highway (AH-1)—a vital corridor for Thai-Myanmar border trade, with an average value (based on fiscal year calculations, 2018–2019 to 2023–2024 excluding mini budget) of around USD 4.4 billion per year and USD 370 million per month (**see Appendix 2 for details on the AH-1.**) The route is currently controlled by multiple armed groups, including the Karen National Liberation Army (KNLA) and the Border Guard Force (BGF), forcing trade to divert through a detour riddled with checkpoints and informal taxes. The disruption has hurt Thai businesses and contributed to widespread shortages of consumer goods in Myanmar. For Thailand, reopening the highway serves as a test case for whether a step towards de-escalation through trade and economic incentives can be pursued, and Thailand can strike a balance for mutually beneficial relations with each of Myanmar's armed actors.

Border Trade Disrupted by Asian Highway Closure

The Myawaddy–Kawkareik section of Asian Highway 1—a key trade route between Myanmar and Thailand—remains closed. This disruption has led to an estimated loss of **nearly USD 721.96 million** in trade (based on a comparison of the first six months of 2023 and 2024). With the main road blocked, transport has been rerouted through a rural path across the Dawna Range. Along the Myawaddy–Hpa An road, control of border trade checkpoints is fragmented: two stations remain under State Administration Council (SAC) partial control, while **over 22 checkpoints** are controlled by Ethnic Armed Organizations (EAOs) and Border Guard Forces (BGF).

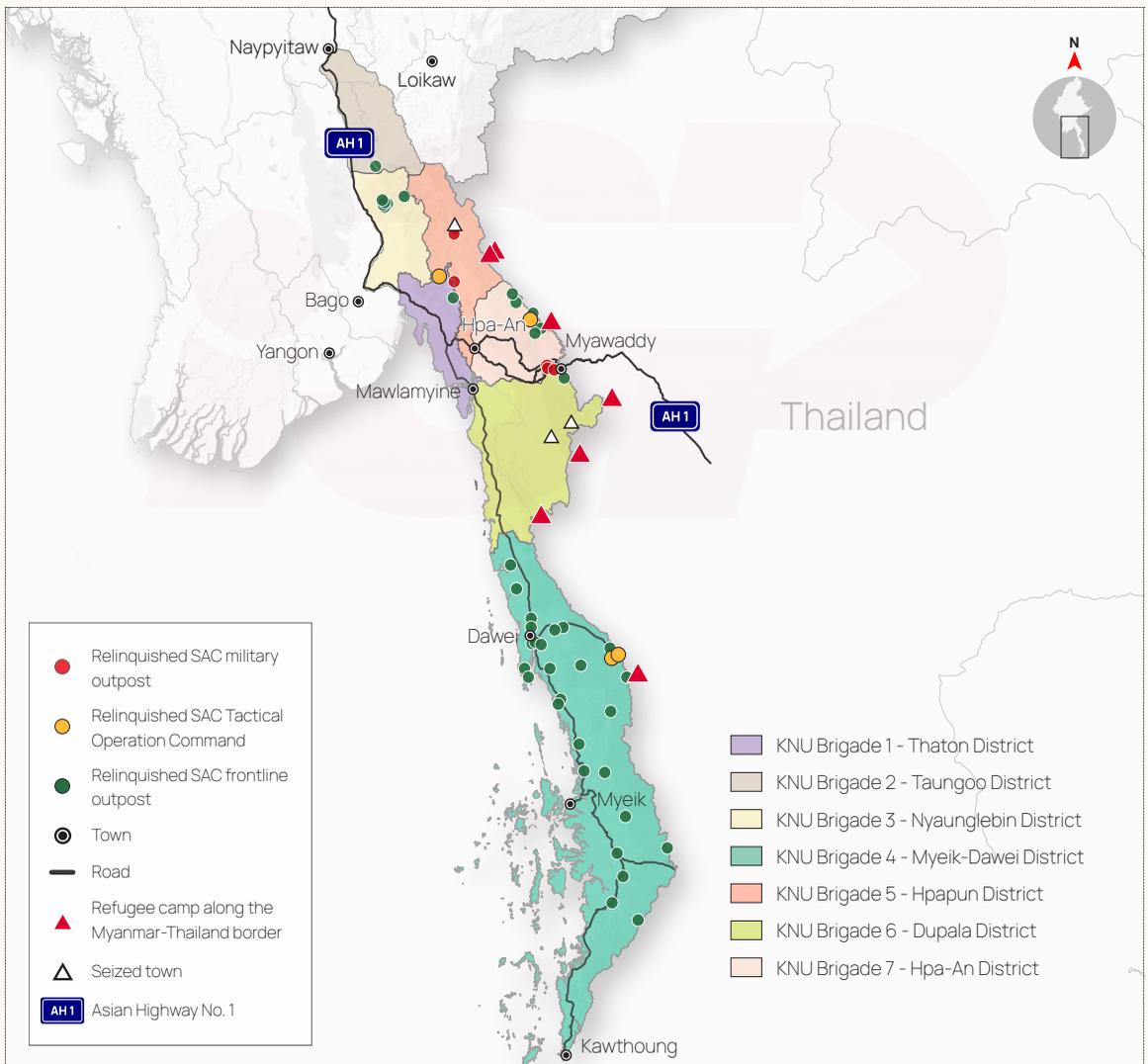


SAC Outposts Lost Within KNU-Designated Brigade Areas

ISP Mapping Number 98

ISP Mapping

The Karen National Union (KNU) has **seven brigades**, each operating within its designated district. Since the 2021 coup, most of the intense armed clashes in Karen State have occurred in Brigade 5, located in Hpapun District. As of now, the military wings of the KNU, Karen National Liberation Army (KNLA) and Karen National Defence Organisation (KNDO), and allied People's Defence Forces (PDFs) have **taken over three towns** and **over 200* small and large military outposts** of the State Administration Council (SAC) including **six battalion bases** and **six Tactical Operation Command**.



Data as of May 26, 2025, is based on ISP-Myanmar's research and may vary from other sources due to differences in methodology and data availability. (*) This map only illustrates key battalion bases, Tactical Operation Command (TOC) and major outposts and does not include small outposts.



While Thailand appears to be gravitating toward China's approach to the Myanmar crisis, at least five key contextual differences separate the two countries.

While Thailand appears to be gravitating toward China's approach to the Myanmar crisis, at least five key contextual differences separate the two countries. First, China wields far greater influence over the Myanmar regime—and actively exercises it—whereas Thailand lacks comparable leverage and has not made strategic use of what influence it holds. Second, China has a stronger grip on the ethnic armed organizations (EAOs) along its border. Since mid-2024, for example, it has imposed targeted sanctions through a “five cuts” strategy on EAOs in northeastern Myanmar, prompting military and political shifts aligned with its interests (see **30 Minutes with the ISP, Event 6: “Sanctions with Chinese Characteristics.”**) Thailand, by contrast, appears to lack similar authority.

A third key difference lies in the organizational structure and political agendas of the EAOs along China's and Thailand's borders. EAOs near China are more centralized and tend to prioritize military victories, but they do so without urgently linking these gains to a political settlement. Many lack formal alliances with pro-democracy forces such as the National Unity Government (NUG). By contrast, EAOs along the Thai border are weaker in centralization and coherency, with diverse political affiliations that make trade-driven or ceasefire-only approaches less effective. One notable distinction is the presence of BGFs on the Thai side. Aligned with the SAC, these units wield significant influence. Furthermore, the United Wa State Army (UWSA) maintains a significant presence of troops, especially close to Thailand's northern border. This substantial force exacerbates Thailand's geopolitical challenges, due to the group's ▶

■ Five Key Differences Between China and Thailand in Addressing the Myanmar Crisis

No.	CHINA	THAILAND
1	Wields significant influence over the Myanmar military and actively leverages it.	Holds limited influence over the Myanmar military and has exercised it to a limited extent.
2	Has strong influence over EAOs along the China-Myanmar border.	Has weak influence over EAOs along the Thai-Myanmar border.
3	EAOs near China are more centralized and tend to prioritize military victories without urgently linking these gains to a political settlement.	Southeastern EAOs are less centralized and prioritize political alliances. Strong SAC-aligned BGF and UWSA's Southern Military Region present along the Thai border.
4	Has a decisive political system and well-coordinated, swift-acting state institutions. Media and civil societies operate under the tight control of the PRC.	Functions through slower, decentralized institutions with a strong civil society and competing interests.
5	Wields significant global influence and can act outside international norms.	Exerts limited global influence and is more constrained by international norms.

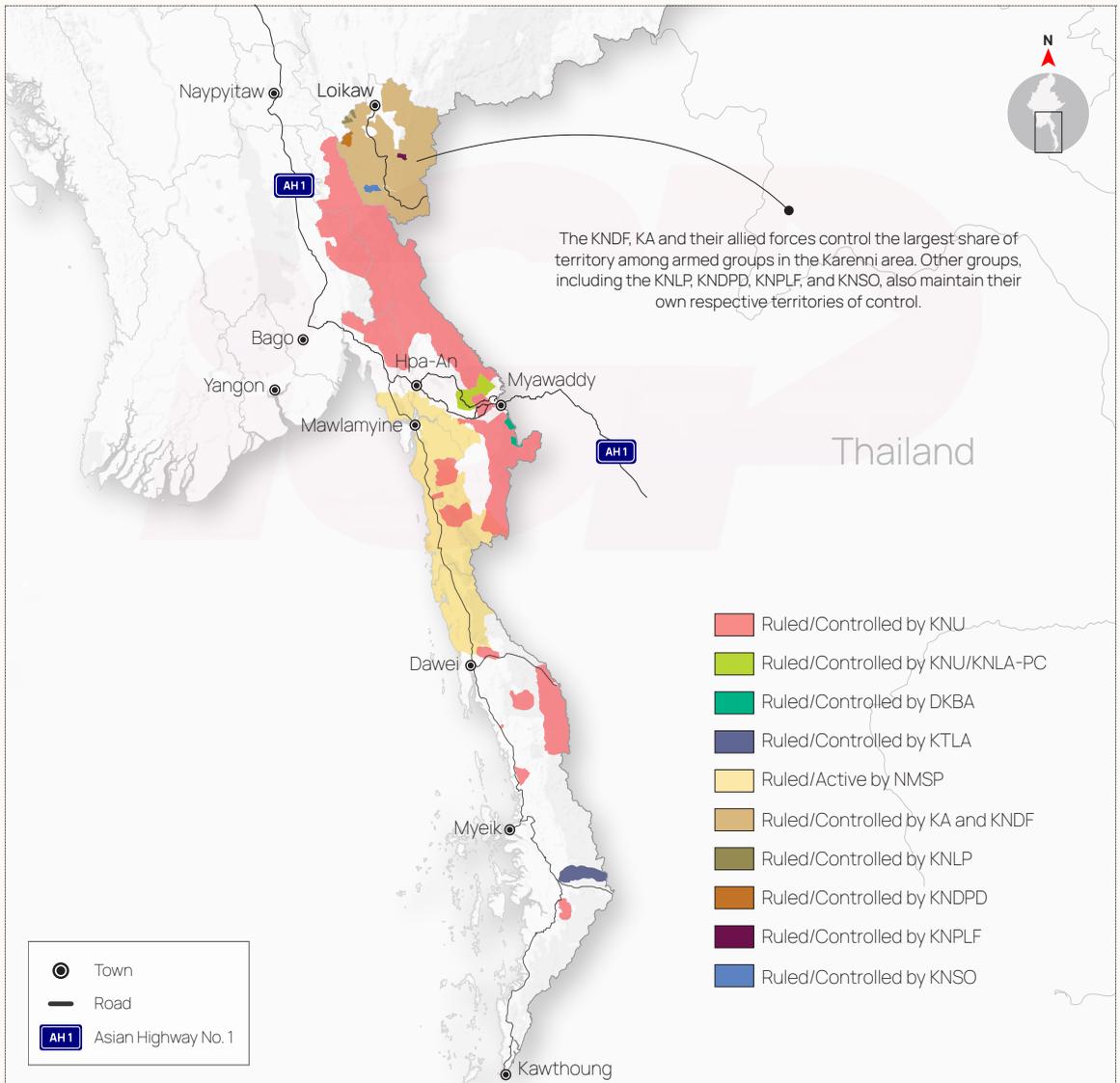
► loyalty to China, in addition to the growing scale of drug trafficking and other illicit economies. While the SAC rejected the UWSA offer to mediate in Lashio, it allowed the BGF under Saw Chit Thu to operate in Myawaddy (see Appendix 3 for details on The Battle for Myawaddy)—an arrangement that effectively subcontracted sovereign authority (see On Point No. 24, “O’ Northern Road: Subcontracting Sovereignty.”) Unlike China, which dismantled the Kokang BGF and shut down numerous scam operations, Thailand’s role in anti-scam efforts has been largely confined to human trafficking rescues, underscoring its more limited capacity. A fourth key difference is that Thailand’s political

system, institutional capacity, and coordination mechanisms are less swift and decisive than China’s—limiting its ability to match Beijing’s effectiveness. Unlike China, Thailand’s vibrant civil society and relatively independent media make it harder to maintain information control while engaging with the many stakeholders involved in Myanmar’s conflict. A fifth difference lies in Thailand’s more complex relationship with the international community—particularly Western countries and ASEAN—compared to China’s. Beijing shows limited sensitivity to international scrutiny, as illustrated by its targeted sanctions on EAOs in northeastern Myanmar.

EAOs in the Southeastern Region of Myanmar

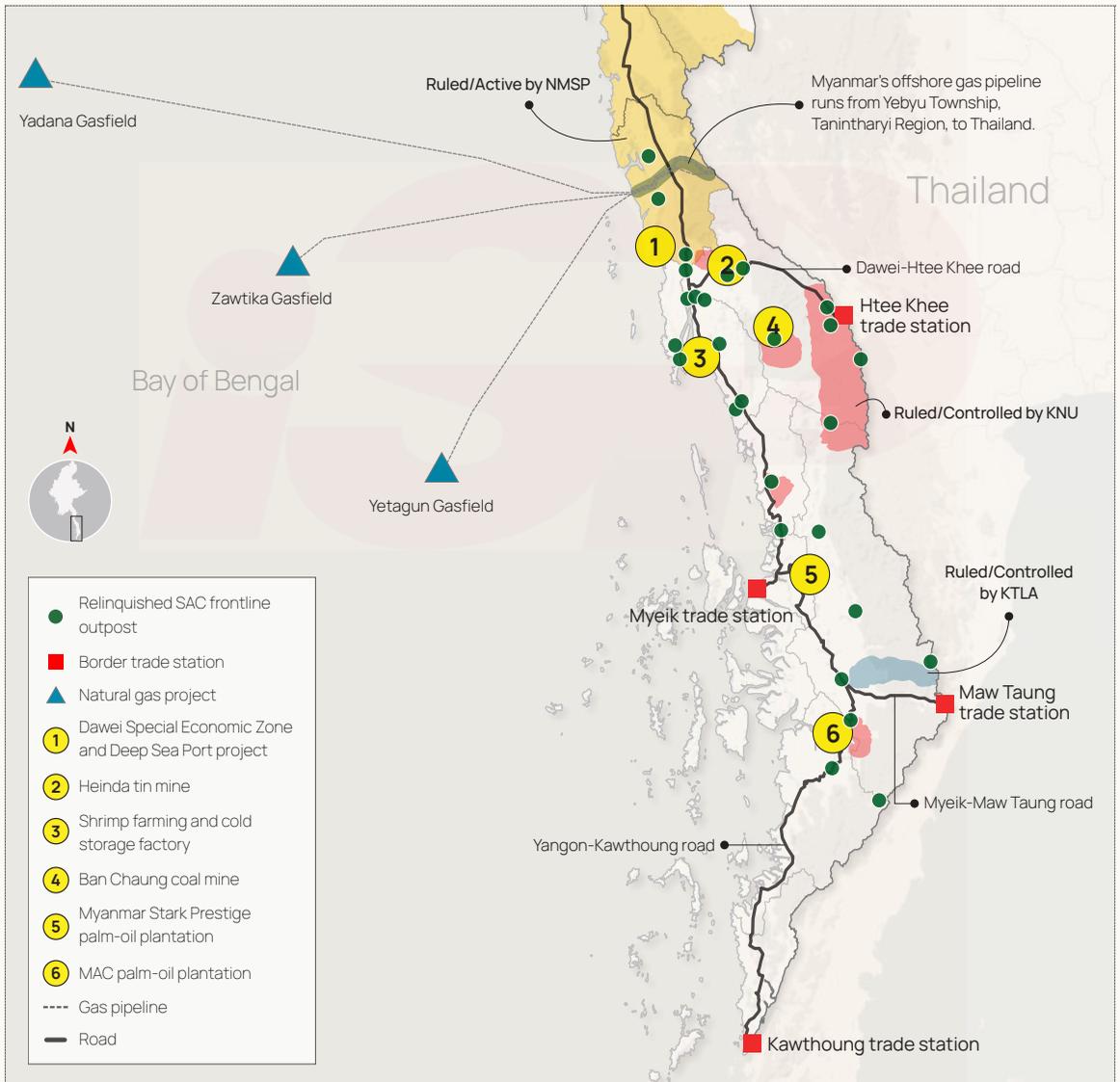
ISP Mapping Number 99

In southeastern Myanmar, **seven** Ethnic Armed Organizations (EAOs) and **at least 85** People's Defence Forces (PDFs) are currently active. The key EAOs in the region include the Karen National Union (KNU), KNU/KNLA–Peace Council (KNU/KNLA-PC), Democratic Karen Buddhist Army (DKBA), New Mon State Party (NMSP), Karenni Army (KA) and the Karenni Nationalities Defence Force (KNDF). The Kawthoolei Army (KTLA) and the Border Guard Force under the State Administration Council (SAC-BGF) also operate in this corridor.



Trade and Conflict Conditions Along the Tanintharyi Border

In the Tanintharyi Region, Ethnic Armed Organizations (EAOs) and their allies seized **over 30 military outposts** of the State Administration Council (SAC). Several of these outposts are located near key Myanmar–Thailand border trade stations, the **Htee Khee and Maw Taung trade stations**. The region is also home to **at least nine foreign investments**, including **three gas pipelines** that connect directly to Thailand.



Data as of May 24, 2025, is based on ISP-Myanmar's research and may vary from other sources due to differences in methodology and data availability.



Unlike Beijing, Bangkok cannot ignore the political aspirations of the Myanmar people, nor can it impose a coercive solution. Thailand lacks the structural leverage and unilateral influence that allow China to act with such certainty.

While these structural differences may limit Thailand's influence compared to China, some of them also present potential strategic advantages if leveraged wisely. Unlike China, whose approach to the Myanmar crisis struggles to win public and international support, Thailand's stronger international ties, particularly within ASEAN, and especially under Malaysia's chairmanship (with which Thailand has good relations), offer a unique opening. If Thailand can navigate the Five-Points Consensus (5PC) to resolve Myanmar's conflict while delivering concrete outcomes, it can benefit significantly. With creative policymaking and effective coordination, Thailand could help chart a new path toward resolving the Myanmar crisis. **(See Appendix 4 for more details of Thailand's efforts to resolve the Myanmar crisis.)**

■ Scenario Forecast

The military operations launched by the KNLA and its allied forces appear to be a calculated effort to assert their strength. According to ISP-Myanmar's research, the KNU has conducted what it calls the "Four-Month Operation" since May. Beyond gaining control of part of the Asian Highway, their presence at key border checkpoints like Htee Khee and efforts to seize military outposts in Tanintharyi Region suggest a broader aim: to expand territorial control. In light of recent victories by EAOs in northeastern Myanmar and Rakhine, the KNU seems to believe that without military victories and territorial control—especially along the border—resistance groups are unlikely to be seen by neighboring countries as strategically significant. Demonstrating such military muscle, the KNU hopes, ▶

- ▶ may pressure Thailand to engage with resistance forces more seriously—and perhaps, inevitably.

The joint operations by the KNLA and its allied forces raise pressing questions: will these escalate into full-fledged town-capture offensives, as seen in the northeast and Rakhine, or will securing key border outposts suffice to establish a military corridor in the southeast?

(See Appendix 5 for more on southeastern EAOs.) It remains to be seen whether Thailand will begin treating these resistance forces as more than just non-state actors and engage with them more seriously. On the ground, these forces face practical constraints—limited access to arms and ammunition, stretched supply lines, and logistical difficulties that will be compounded by the approaching monsoon season. These factors cast doubt on their capacity to sustain operations beyond August or September. This will be critical in evaluating the momentum and impact of current outpost seizures. More importantly, as is often the case with EAOs in the southeast, the success of these campaigns will hinge on how they will leverage a military victory to pursue specific political objectives and strategically bring alliances on board.

If Thailand hopes to succeed in de-escalating Myanmar's conflict, it may struggle by simply following China's lead—particularly if that path leads to endorsing the SAC's planned election. Unlike Beijing, Bangkok cannot ignore the

political aspirations of the Myanmar people, nor can it impose a coercive solution. Thailand lacks the structural leverage and unilateral influence that allow China to act with such certainty. The model of “the elephant's steps create a path”³—where sheer power determines outcomes—does not translate well to Thailand's context. When underlying conditions diverge, the “Northern Road” is unlikely to extend southward. Instead, Thailand must develop a model of its own—one grounded in respect for the will of the Myanmar people, inclusive engagement, and alignment with international frameworks such as UN Security Council resolutions and ASEAN's Five-Point Consensus. By adapting to these guardrails and leveraging its diplomatic strengths into a coherent policy, Thailand has a better chance of helping to shape a resolution that is both legitimate and durable. As the Burmese proverb goes, “the squirrel can tread on the branch; so can the bees build a hive on it.” The same tree and branch can satisfy opposing sides by navigating a path through conflicting demands. What Thailand needs is a strategic model that is both practical and persuasive—one that is, in effect, a Thread-the-Needle act. ■

3 A literal translation of a Burmese proverb, meaning that powerful figures, or sheer power, can forge a new path by their own weight and strength.

APPENDIX-1

● US Tariff on Thailand: Economic Impacts and Myanmar Spillover

The United States has imposed a 36 percent tariff on imported Thai goods under the name of "liberation day" on April 2, despite a 90-day pause for this order for actual implementation, which is looming threat over Thailand's export sector. With trade representing 60–65 percent of Thailand's GDP, Thailand is heavily dependent on this sector, and the new tariff could result in economic losses estimated at USD 7–8 billion, disproportionately affecting small and medium-sized enterprises (SMEs). Thailand hosts around six million Myanmar migrant workers and over 100,000 immigrant settlers, a consequence of Myanmar's 2021 coup. Many of these workers are employed in agriculture, fisheries, construction, garments, and tourism. However, the rising economic pressures may lead to job losses, wage cuts, and reduced incomes and remittances to Myanmar. These impacts could also affect Thai industries, workers, and migrants employed in them. Dismissals and lower incomes risk increasing petty and transnational crimes, potentially disrupting social cohesion and stoking nationalism. This could give rise to an unprecedented "Anti-Myanmar migrants sentiment and movements" in Thailand, creating fertile ground for political exploitation by opportunistic politicians. ■

APPENDIX-2

● Asian Highway No. 1

Asian Highway No. 1, the longest route in the Asian Highway Network at over 10,000 miles, connects Southeast Asia to South Asia, running through Thailand into Myanmar and extending toward India. Since Myanmar's 2021 military coup, the highway's crucial Myawaddy–Kawkareik section in Karen State has been temporarily shut down at least five times due to clashes between the Karen National Liberation Army (KNLA) and State Administration Council (SAC) forces. The most recent closure began during the battle for Kawkareik in December 2023 and remains in effect. The highway plays a vital role in Myanmar-Thailand border trade, and its prolonged closure has resulted in an estimated USD 721.96 million in trade losses (based on a comparison of the first six months of 2023 and 2024.) With the main route blocked, traffic has been diverted to rural routes through the Dawna Range in Myawaddy. These alternative routes have faced heavy taxation, with as many as 51 checkpoints once operated by Karen armed groups. By May 2025, however, the number of active checkpoints along the Myawaddy–Hpa-An rural routes had declined to 24. Despite Thailand's repeated efforts to hold discussions to resume normal operations of the Asian Highway No. 1, it has not been able to reopen regularly till now. ■

Data as of May 24, 2025, is based on ISP-Myanmar's research and may vary from other sources due to differences in methodology and data availability.

APPENDIX-3

● The Battle for Myawaddy

Myawaddy, a border town with a population of approximately 130,000, is a key trade gateway between Thailand and Myanmar, intersected by the No. 1 Asian Highway (AH-1). Accounting for 23 percent of Myanmar's total border trade, the town handles an average of over USD 4.4 billion (based on fiscal year data from 2018–2019 to 2023–2024, excluding the 2021–2022 mini-budget) in annual bilateral trade. Its strategic importance lies in its role in taxation, geographic location, and regional influence.

On April 11, 2024, the Karen National Liberation Army (KNLA), under the Karen National Union (KNU), and the People's Defense Force (PDF), aligned with the National Unity Government (NUG), launched a joint offensive, seizing the Thingannyinaung Tactical Operation Command—key to Myawaddy's security. A total of 617 SAC personnel, including soldiers, officers, and family members surrendered not to the KNLA-PDF, but to the Border Guard Force (BGF) led by Saw Chit Thu. The BGF later returned the surrendered personnel and their weapons to the SAC. During the operation, the joint forces also shot down an SAC helicopter sent to reinforce Battalions 355 and 356. A subsequent attack on the Myawaddy town garrison battalion pushed the town to the brink of capture, forcing SAC troops to retreat under the Thai-Myanmar Friendship Bridge No. 2. However, the resistance faced setbacks—including ammunition shortages, SAC airstrikes, and the BGF's realignment with the SAC—which led to their withdrawal. The BGF has virtually controlled the security and stability of Myawaddy.

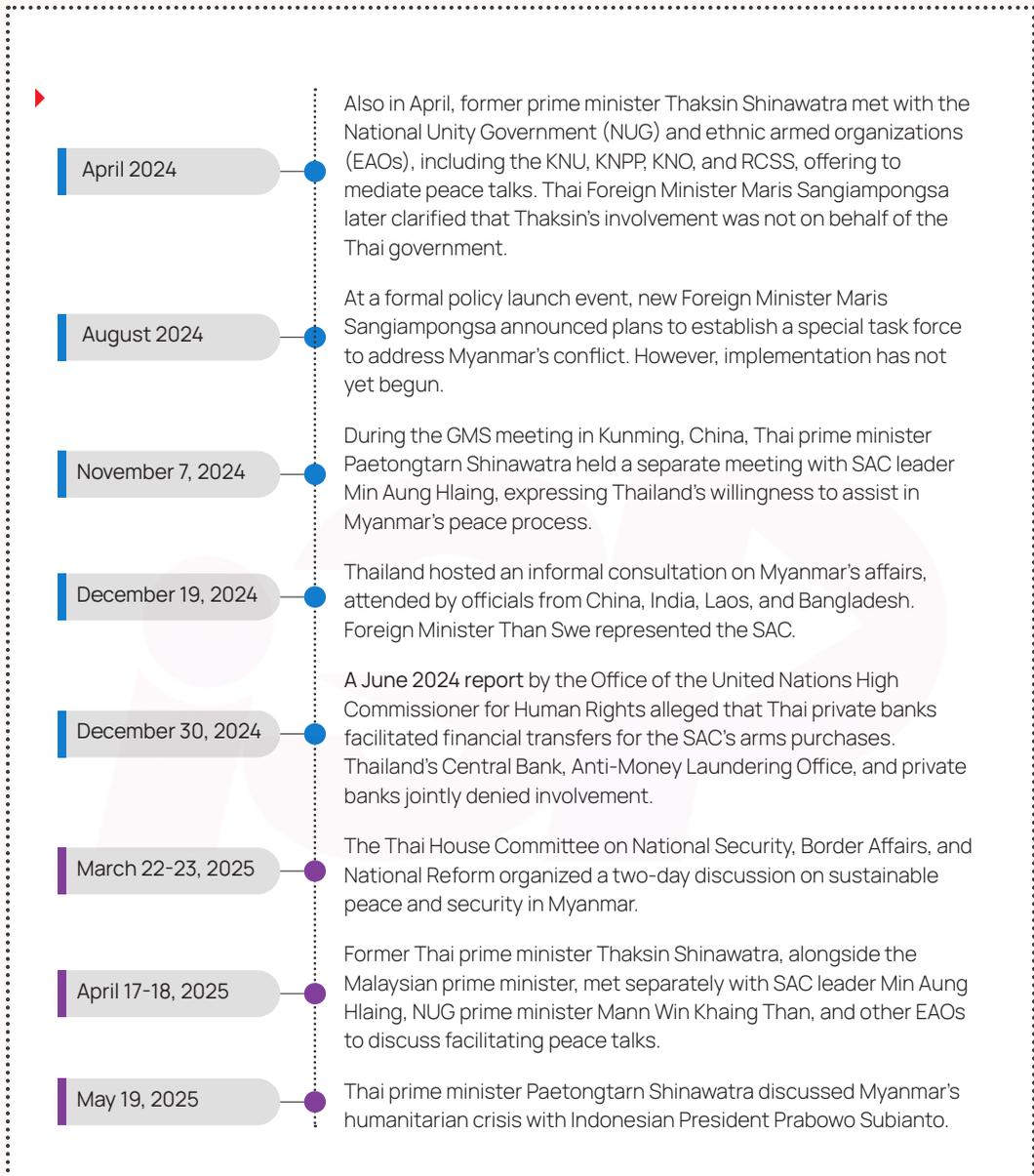
Since April 2024, no major clashes have been reported in Myawaddy. Border trade operations have partially resumed, and customs, police, General Administration Department (GAD), and SAC battalions remain active. In early 2025, joint pressure from China and Thailand spurred crackdowns on online scam syndicates, with the BGF playing a central role in arrests and rescues. Detainees were handed over to Myanmar's police and immigration before being transferred to Thailand.

The fighting in Myawaddy displaced thousands of residents, many of whom fled to Mae Sot in Thailand. Former Thai prime minister Srettha Thavisin visited Mae Sot in response, commenting to *The Nation*: "The current regime is starting to lose some strength." He added, "But even if they are losing, they have the power, they have the weapons." He further stated, "Maybe it's time to reach out and make a deal." As of now, control over the area remains contested, with SAC forces, the KNLA, BGF, Democratic Karen Buddhist Army (DKBA), and KNU/KNLA–Peace Council (KNU-PC) all maintaining a presence. ■

APPENDIX-4

● Thailand's Efforts to Address the Myanmar Crisis
(April 2021 - May 2025)

- April 24, 2021** At an ASEAN summit in Jakarta, Indonesia, the State Administration Council (SAC) leader met with ASEAN leaders, including Thailand's then-prime minister General Prayut Chan-o-cha. The meeting resulted in the adoption of the ASEAN Five-Point Consensus.
- June 14, 2022** Thai Foreign Minister Don Pramudwinai invited ASEAN counterparts to re-engage with the SAC, which had been excluded from ASEAN meetings. However, the initiative failed to gain traction after Indonesia and Singapore declined to participate.
- March 24–25, 2023** Thailand hosted a Track 1.5 dialogue on the Myanmar crisis, attended by officials from like-minded countries, including Cambodia, Laos, Vietnam, China, India, Bangladesh, and Japan.
- June 19, 2023** The second round of the Track 1.5 dialogue was held in Pattaya, Thailand, with participation from Cambodia, Laos, India, China, Brunei, and Vietnam.
- July 9, 2023** Thai Foreign Minister Don Pramudwinai held a private meeting with detained Myanmar leader Aung San Suu Kyi. He later shared details of the conversation during an ASEAN Foreign Ministers' Meeting in Jakarta.
- January 29, 2025** Thai prime minister Srettha Thavisin proposed establishing a humanitarian corridor to assist approximately 20,000 displaced persons. ASEAN expressed support for the plan, though no details were made public.
- March 2–3, 2024** The Thai Parliament convened a meeting on the Myanmar situation, which included participation from Myanmar's resistance forces.
- March 25, 2024** With ASEAN's endorsement, Thailand facilitated humanitarian aid deliveries to conflict-affected areas in Karen State. The Thai and Myanmar Red Cross coordinated the delivery of 4,000 relief kits via the Mae Sot–Myawaddy border crossing.
- April 2024** Former deputy prime minister and Foreign Minister Parnpree Bahiddha-nukara convened key government agencies to formulate Myanmar policy. They proposed forming a Myanmar Taskforce led by Deputy Foreign Minister Sihasak Phuangkitkeow. The initiative stalled after a cabinet reshuffle in April, during which Parnpree resigned.



APPENDIX-5

● Myanmar's Southeastern EAOs

Since the 2021 military coup, Myanmar's southeastern region has become a key sanctuary for young people joining the armed resistance, as well as a hub for newly formed armed groups. Over the past four years, the Karen National Liberation Army (KNLA) and Karen National Defense Organization (KNDO)—military wings of the Karen National Union (KNU)—have engaged in sustained combat against the State Administration Council (SAC) across Karen State, Mon State, Bago Region, and Tanintharyi Region. They have captured over 200 SAC military outposts, including Tactical Operation Command near the Thai-Myanmar border in Hpapun, Hlaingbwe, Myawaddy, and Kyainseikgyi. These victories have allowed the KNU to assert control over key trade corridors, notably the Myawaddy and Htee Khee border zones, as well as the No. 1 Asian Highway and the Htee Khee–Dawei road. In the Karenni region, resistance forces—including the Karenni Army (KA), Karenni National Defense Force (KNDF), and allied groups—now control approximately 70 percent of the territory. In Tanintharyi, where two Thai-Myanmar border trade posts are located, KNU and local defense groups continue efforts to seize the Htee Khee trade zone. ■





"O' Northern Road..."

RAKHINE

A De Facto Rival Power Center

ISP On Point No. 26
July 2025



Arakan Army members maintaining road safety in Mrauk-U.
Photo - Arakan Princess Media

“O’ Northern Road...”

Rakhine: A De Facto Rival Power Center

Myanmar’s Conflict Resolution that Needs Guardrails and
the Future Prospect

ISP ON POINT NO.26

Summary

Since February 2025, fighting between the Arakan Army (AA) and the State Administration Council (SAC) in Rakhine State has intensified. The number of displaced persons has increased significantly. Alongside heavy rains and flooding, natural disasters have led to acute food shortages. While humanitarian conditions have worsened, international support remains limited. There are reports that neighboring Bangladesh is discussing the establishment of a humanitarian corridor with the Arakan Army (AA), but disagreements persist. Meanwhile, news that the AA has designated the Paletwa region in Chin State as a district of Rakhine has sparked regional controversy.

The AA is the only Ethnic Armed Organization (EAO) capable of launching offensives from Rakhine to Ayeyarwady, Magway, and Bago regions. With its strategy of “securing an extended yard, building a high fence, and keeping reliable gatekeepers,” the AA is expanding its territorial influence. At the same time, it avoids politically binding “over-talked” alliances and instead builds a network of action-oriented, military-focused junior alliances. The AA’s political objectives remain unclear, maintaining strategic ambiguity—whether it seeks secession, a confederation, or a federal democratic system. Although Rakhine has emerged as a de facto rival power center, it still faces significant challenges.

In the future, the AA faces three major challenges: (1) addressing the Rohingya and Chin issues justly and inclusively, (2) translating military successes into political outcomes and establishing effective governance and economic systems, and (3) managing resource and arms shortages as the conflict prolongs. Failure to address these could undermine public acceptance and the success of building a new vision and order. In external relations, the AA must navigate carefully and equitably to maintain its de facto rival power center status without destabilizing it. Due to differing political objectives among EAOs, it remains unlikely that the northeastern, southeastern, and western corridors will unite to exert political pressure on Naypyitaw or coalesce around a shared vision for a new national framework.

“O’ Northern Road...”¹

Rakhine: A De Facto Rival Power Center

Myanmar’s Conflict Resolution that Needs Guardrails and the Future Prospect²

■ Events

Since February 2025, fierce fighting between the Arakan Army (AA) and Myanmar’s junta forces in Kyaukpyu Township, Rakhine State, has displaced more than 20,000 people—within just four months—in a township of scarcely 150,000 residents. According to ISP-Myanmar’s data, over 700,000 people are now internally displaced across AA-controlled areas in Rakhine, representing nearly 23 percent of the state’s 3.2 million population. Meanwhile, nearly one million Rohingya refugees remain in increasingly dire conditions. Rakhine, already highly vulnerable to climate change, has been battered by heavy rains this month, resulting in flooding in several townships, such as Maungdaw and Buthidaung, causing acute food shortages. Hundreds of Rohingya have capsized attempting to flee by sea, while humanitarian conditions in refugee camps continue to deteriorate; despite the dire situations, there is limited international attention on this matter.

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- 1 The phrase of this OnPoint’s title “O’... Northern Road...” is taken from the Muse-Namkham Road [song] composed and sung by famous Shan singer Sai Hsai Mao.
 - 2 ISP-Myanmar is concluding its trilogy on Myanmar’s Conflict Resolution that Needs Guardrails and the Future Prospect with this final OnPoint publication, the third of the series.

Bangladesh's caretaker government has floated idea of humanitarian corridor with United Nations and AA in the area between Rakhine and Bangladesh. But even among Bangladesh's military, civilian authorities, and political factions, disagreements persist on this matter. Meanwhile, controversies have been sparked by the news that the AA has designated the Paletwa region of the neighbouring Chin State as a district of Rakhine.

■ Preliminary Analysis

The Arakan Army (AA) stands out as the only Ethnic Armed Organization (EAO) in Myanmar capable of projecting force across the country's northeastern, southeastern, and western conflict corridors, while extending its influence deep into the Dry Zone *Anyar* Region, the heartland of the Bamar. Based in Rakhine State, the AA has launched coordinated offensives in Ayeyarwady, Magway, and Bago regions—territories beyond the traditional reach of most EAOs. Led by a new generation of leaders, the AA has built the country's most extensive alliance of armed groups, linking up with young and emerging actors through its "less talk, more action" approach. It plays the role of an senior sibling in a "big brother–little brother" clientelistic relationship—supplying arms, offering training, and serving as a model. No other ethnic armed group has woven such a far-reaching web of influence among the country's next generation of fighters. (Learn more about Major General Twan Mrat Naing and the Arakan Army's Three Tactical Innovations in Appendices 1 and 2, respectively.)

A review of the AA's strategy can explain these characteristics: securing an extended yard, putting up a high fence, and keeping reliable gatekeepers. From its stronghold in Rakhine, the group has extended its reach into Chin, Magway, Bago, and Ayeyarwady—shielded by rugged terrain, mountain ranges, and a strategic alliance that forms a protective fence of trusted proxy young armed groups. The strategy has so far proved effective. Still, the AA has yet to clearly articulate the ultimate goal behind this strategy. Buoyed by military victories and growing capacity, Rakhine has become a de facto rival power center—lacking only the stamp of international recognition. Yet questions linger over the group's long-term ambitions. (1) Does the AA aim to secede and establish an independent state? Or, (2) will it instead push for a confederation or a "one country, two systems" model? Or, (3) might it seek to topple the military regime along with other allies and help build a federal democratic Myanmar? Whichever path it pursues, there will be more challenges ahead. A bid for independence, for instance, would face steep obstacles—not least the State Administration Council's (SAC) strength in air force and naval, and the near-certain opposition of neighbouring states. These constraints pose serious questions on its chance of success.

If perceptions grow that the AA is no longer focused on ending military dictatorship but is instead pursuing a strategy of "securing an extended yard, a high fence, and reliable gatekeepers"—as seen in the cases of the Kokang Myanmar National Democratic Alliance Army (MNDAA) and Ta'ang National Liberation Army (TNLA) following their

military victories—it will inevitably face a fundamental question: is it a liberation force or an army of expansion? This debate is already taking shape among Chin factional groups. If Chin EAOs and PDFs fail to reach an agreement with the AA over the strategically vital town of Paletwa—and if infighting among Chin armed groups continues its dog-eat-dog course—the Chin resistance is likely to remain a marginal player in the broader western theater. Chin's struggle for equality and justice may endure, but without unity among themselves, its strategic weight will be limited. So far, the AA has deliberately maintained strategic ambiguity over its ultimate political aims. By adopting a "less talk, more action" approach, it has cultivated the largest armed alliance network in the country while avoiding definitive commitments. This calculated vagueness appears designed to preserve flexibility, allowing political decisions to be shaped by evolving opportunities on the ground.

The more victories the AA secures, the more it must grapple with strategic and political dilemmas, alongside three lures in managing external relations as a de facto rival power center. If navigated carefully, these challenges could strengthen Rakhine's position; if misjudged, they risk strategic overreach. The first of these lures lies in its relationship with the Bamar. Centuries-old grievances over the loss of Arakan sovereignty, compounded by a history of marginalisation under both military rule and the National League for Democracy (NLD) government, have fostered deep distrust. For the AA, engaging with Bamar political actors—whether the junta or pro-democracy

► forces—is fraught with difficulty, yet avoiding them altogether is hardly viable. Like fire, this relationship has the potential to illuminate or to consume, depending on how it is handled.

The second external relations lure for the AA lies in its relations with other Ethnic Armed Organisations (EAOs). AA prefers to avoid a more-talk alliance where it requires binding political commitments, and instead prefers more action-oriented, pragmatic junior military alliances. Its engagement with powerful senior EAOs, such as the United Wa State Army (UWSA), was noticeably confined to arms, ammunition and economic interest. Though such narrow military alliances as the 3BHA have their limits, they appear sufficient for the AA's current objectives. AA's strategic decisions are driven not by the tempo and conflict calendar of political alliance but by their own internal assessments and long-term calculations. Up until 18 months after the coup, the AA had intentionally avoided direct confrontation with the junta, focusing instead on consolidating strength, building networks, and stockpiling resources. Even as it took a leading role in Operation 1027, its subsequent offensives in Rakhine from November 2023 were carefully decoupled from the branding of Operation 1027 and distanced itself from the broader narratives of the Spring Revolution. The third external relations lure for the AA concerns how it navigates relations with and approach from Western governments. On the one hand, it cannot disregard international human rights norms and legal standards; on the other, fully embracing them risks entanglement in what AA leaders informally call the too much talk like NGOs political dilemma.



AA prefers to avoid a more-talk alliance where it requires binding political commitments, and instead prefers more action-oriented, pragmatic junior military alliances. Its engagement with powerful senior EAOs, such as the United Wa State Army (UWSA), was noticeably confined to arms, ammunition and economic interest.



The AA faces three critical challenges, the first of which is normative in nature. It is to address longstanding grievances—particularly regarding the Rohingya and Chin populations—in a manner that is both just and inclusive.

Even more delicate are relations with neighboring Bangladesh and India, which share borders with Rakhine. Both currently acknowledge the AA as the de facto authority in the region, but there is still a critical question whether this is merely a diplomatic fig leaf or the start of more durable recognition. Nonetheless, both are unavoidable neighbors for the AA (Read more about the challenge of the Rohingya issue in Appendix 3).

The AA faces three critical challenges, the first of which is normative in nature. It is to address longstanding grievances—particularly regarding the Rohingya and Chin populations—in a manner that is both just and inclusive. Before AA could resolve these issues, there are chances of more tensions inflamed, provoking impulsive decisions, or prompting other actors to score political points under the guise of assistance, without meaningfully addressing the underlying problem. Such tactical quagmires are already surfacing—and more are likely to follow. In parallel, the humanitarian crisis in Rakhine—driven by both protracted conflict and climate-related disasters—continues to deepen. If left unmanaged, it risks becoming another source of grievance. Most critically, addressing these challenges not only through revolutionary means but also by articulating and building a better alternative vision and order will be key to securing the legitimacy of both the AA and Rakhine.

The AA faces a second, distinctly strategic challenge. As previously analysed, its strategy footprint could be characterised as “securing an extended yard, a high fence, and reliable

► gatekeepers.” Yet the core question remains: can the AA translate its military victories into tangible political outcomes? Its “less talk, more action” approach has so far allowed it to maintain strategic ambiguity regarding long-term political ambitions. But without delivering secure, effective and representative governance, and meeting basic service delivery expectations in the short to medium term—legitimacy crisis may quickly unravel. Beyond immediate fixes in politics, governance, and public services, the AA must incorporate an economic strategy into its broader strategic calculus. Unless it addresses immediate livelihood needs, builds core infrastructure, and develops a functioning economy that creates jobs beyond extractive industries, AA risks entrenching socio-economic vulnerabilities. Such shortcomings could corrode not only the legitimacy of its alternative vision and order but also its performance legitimacy, where competence and delivery are the currency of authority (Read more about Rakhine’s socioeconomic situations in Appendix 4). A further strategic dilemma lies in its posture toward China. As part of its two-ocean strategy, Beijing seeks dependable access to the Indian Ocean. It engages the AA with caution and calculation, clearly playing a long game. Like other players, the Bamar, the Shan, and the Kachin, the people of Rakhine must craft a calibrated China policy aligned with evolving geopolitical realities—a strategic challenge with little room for error.

The third challenge for the AA is tactical. As the conflict endures and regional actors—most notably China—tighten restrictions on the flow of arms and

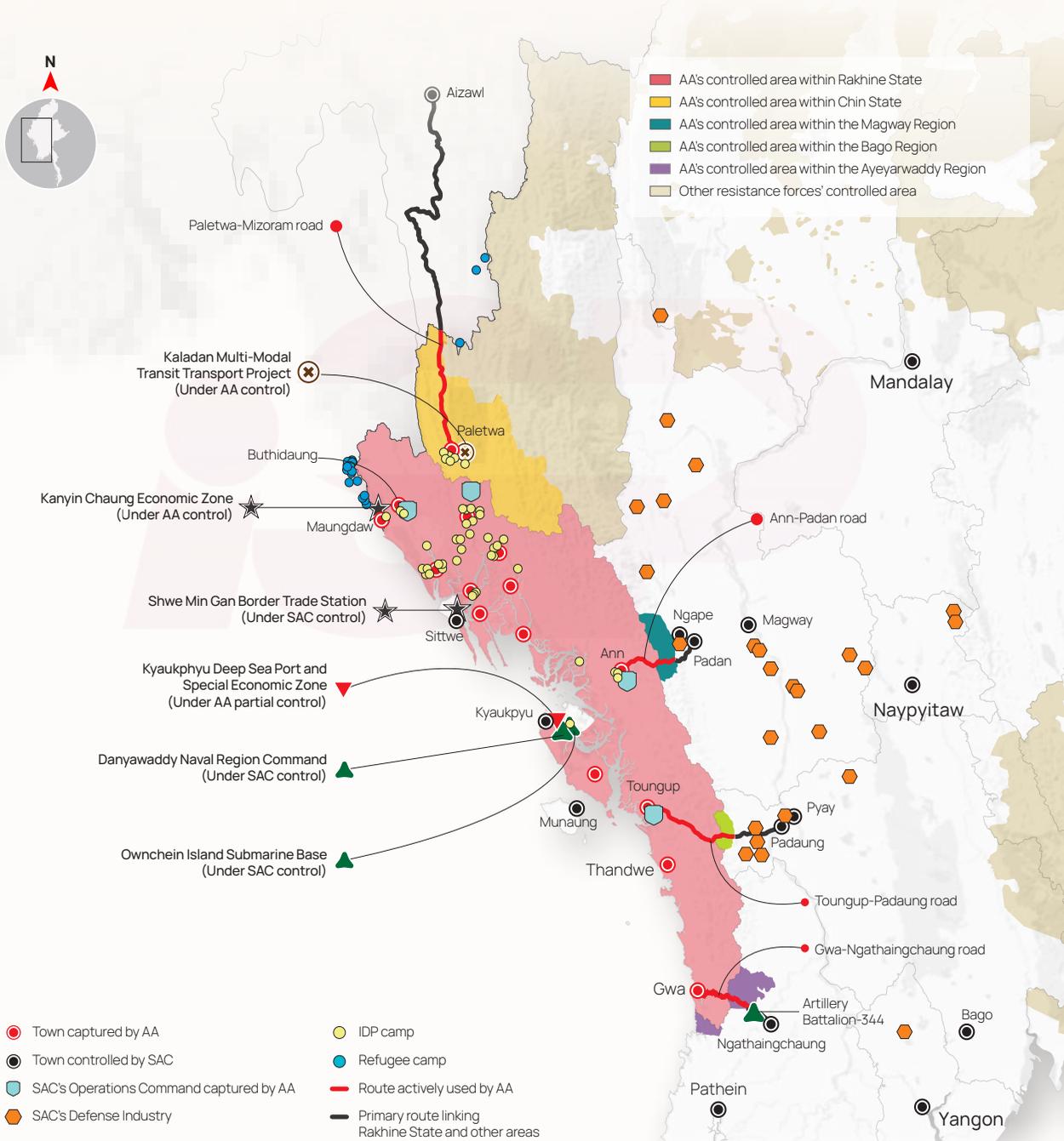
resources, the AA’s extended frontlines risk becoming a liability for overstretching its logistics. To encircle the Myanmar regime, the AA must not only equip its own operations in Rakhine but also support allied offensives elsewhere. Its preferred alliance model—“less talk, more action”—focuses on cultivating junior partners rather than building politically binding coalitions with senior resourceful groups. While this offers operational flexibility, it also imposes logistical burdens. The AA bears the lion’s share not only of supplying arms and resources but also of providing leadership—a precarious position as resources dwindle. As scarcity deepens, competition for priority may expose weaknesses in the alliance structure, thereby increasing the risk of infiltration or collapse. Situations are inherently too difficult to overcome, especially when critical support falters. While the AA may face mounting resource constraints, the junta still maintains its capacity through superiority in air and naval power, expanded troop recruitment via conscription, and a blockade of essential supplies to Rakhine State. Moreover, allegations of the AA’s involvement in the conflict economy—most notably in narcotics trafficking—pose reputational risks that could erode its standing as well as haunt in later future. The analysis thus far covers the strategic doctrine, political ambitions, external relations, and key challenges of the AA, the dominant force in Myanmar’s western conflict theater.

The AA's Push Beyond Rakhine's Borders

ISP Mapping Number 103

ISP Mapping

The Arakan Army (AA) now controls over **93 percent** of Rakhine State's territory, amidst its offensive quest to take all of Rakhine. The AA's military operations penetrated through the Magway, Bago, and Ayeyarwaddy Regions since early 2025.



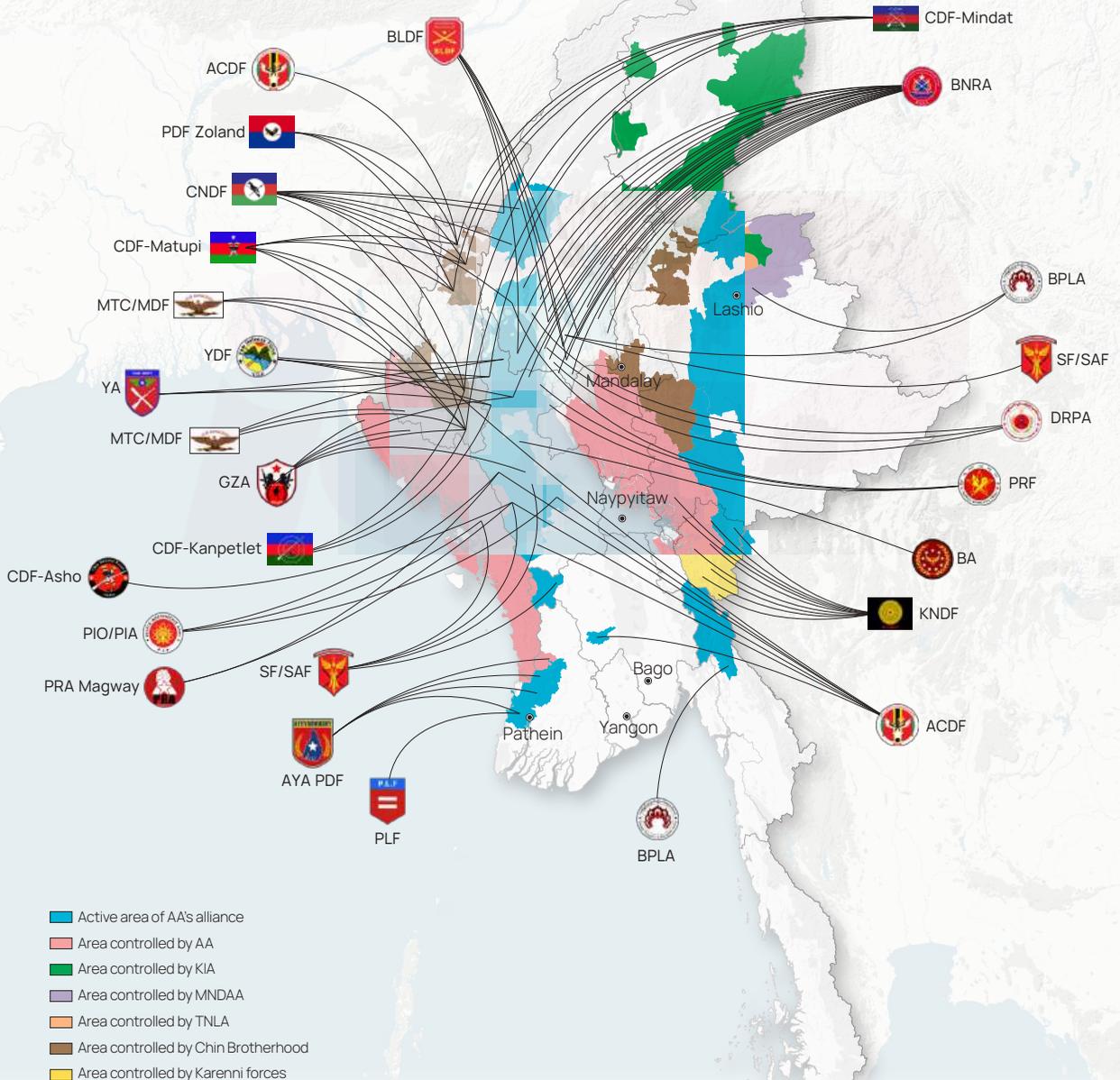
Data as of June 30, 2025, is based on ISP-Myanmar's research and may vary from other sources due to differences in methodology and data availability.

The AA's Post-Coup Network of Alliance

ISP Mapping Number 104

ISP Mapping

Since the 2021 coup, the Arakan Army (AA) has emerged as a major patron of Myanmar's post-coup armed resistance. It has provided full or partial support—ranging from military training to ammunition—to **at least 23 armed groups**. These forces are now militarily active across **61 townships** nationwide. Notably, **18 of these groups** are active in Chin, Magway, Bago, and Ayeyarwady, adjacent regions to Rakhine, where they closely coordinate with AA in operations.



Data as of June 30, 2025, is based on ISP-Myanmar's research and may vary from other sources due to differences in methodology and data availability.

The AA's Web of Alliances

ISP Data Matters Number 163

ISP Data Matters

The Arakan Army (AA) has provided direct or partial support—ranging from military training to ammunition—to **at least 23 newly formed armed groups**. Of these, **eight** closely connect with the AA's command-and-control structure and take part in coordinated military operations.



- Alliance closely connecting with AA's command-and-control structure*
- Alliances receiving full or partial military support from AA

Data as of June 30, 2025, is based on ISP-Myanmar's research and may vary from other sources due to differences in methodology and data availability. (*) "Closely connecting with AA's command-and-control structure" refers to armed groups operating under AA's strategic direction during joint campaigns and having received full or partial military support.

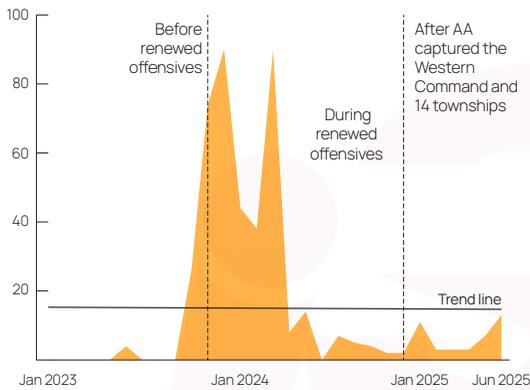
Heating-Up in the Western Theater

ISP Data Matters Number 164

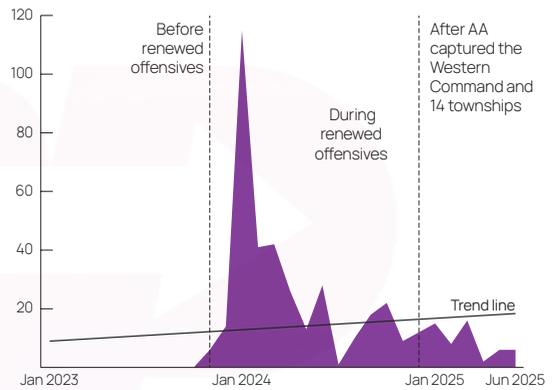
ISP Data Matters

In December 2024, the Arakan Army (AA) seized control of the junta's Western Command, encompassing **14 townships** across Rakhine State. Subsequently, the frequency of armed clashes nationwide declined in the first half of 2025. In Rakhine, clashes fell by **85 percent**, while junta-led airstrikes dropped by **80 percent** during the same period. Yet, data spanning the past two and a half years indicate that both the Rakhine and Myanmar as a whole remain vulnerable to a resurgence in conflict intensity, marked by renewed air assaults, rising civilian death tolls, and swelling numbers of internally displaced persons (IDPs).

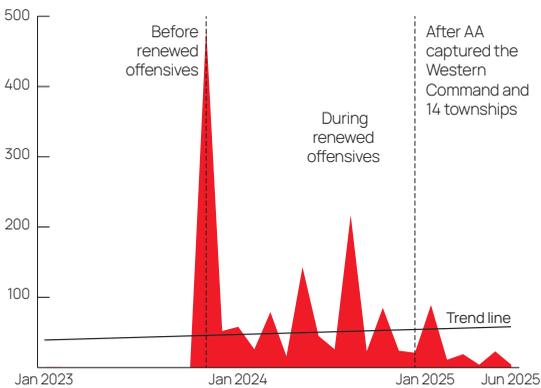
■ Clashes



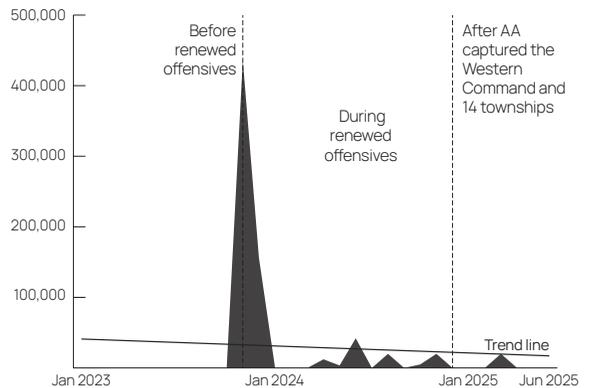
■ Air Strikes



■ Civilian Death Toll



■ Number of IDPs



Data as of June 30, 2025, is based on ISP-Myanmar's research and may vary from other sources due to differences in methodology and data availability.

■ Scenario Forecast

Although Rakhine has yet to be recognized under international laws, it has emerged as a de facto rival power center, effectively serving as a rival center of power. The Arakan Army's (AA) leadership has consistently demonstrated operational effectiveness and acumen, earning widespread recognition for its capabilities. Meanwhile, Myanmar's trajectory over the next decade is unlikely to converge into a single peace process and unified future. Multiple processes and various future options for conflict resolution will certainly exist. Whichever means the country's northeastern and southeastern corridors, armed resistance groups, the National Unity Government (NUG), and domestic political coalitions may pursue - through warfare, dialogue, or electoral pathways, the AA and the United Wa State Army (UWSA) will continue to keep their distance. Only once the mainstream political process gains success and momentum will they weigh the merits of engagement— whether to integrate, align, or remain apart.

Given their divergent political objectives, the northeastern, southeastern, and western corridors are unlikely to unite in exerting political pressure on Naypyitaw or in coalescing around a shared vision for a new national framework. Although the Rakhine resistance initially emerged in Laiza, where Kachin Independence Organization (KIO) headquartered, in the northeast; “the Northern road” is unlikely to evolve into a nationally interconnected movement. For the foreseeable future, Myanmar’s political landscape will continue to be defined by multiple pathways—each forged and followed independently according to distinct aspirations and priorities. It is crucial to minimize conflicts between parallel paths and prevent clashes among competing futures. Additionally, the three external relations lures—Rakhine-Bamar relationship, ties with other EAOs, and engagement with India, Bangladesh, and Western powers— can serve as guardrails to sensitize and make the AA aware of realities. For the militarily proven AA, this could serve as a test of foresight and restraint. ■



For the foreseeable future, Myanmar’s political landscape will continue to be defined by multiple pathways—each forged and followed independently according to distinct aspirations and priorities. It is crucial to minimize conflicts between parallel paths and prevent clashes among competing futures.

APPENDIX-1

● Arakan Leader Major General Twan Mrat Naing

At 47, Maj. Gen. Twan Mrat Naing serves as the Commander-in-Chief of the Arakan Army (AA) and chairs its political wing, the United League of Arakan (ULA). Among the cadre of resistance leaders shaped by the modern Rakhine revolution, he is widely regarded as the most militarily accomplished and politically influential, particularly among the Rakhine population. His political activism dates back to the early 2000s, when he worked as a tour guide while actively engaging in underground Rakhine nationalist networks. During this time, he also established connections with various ethnic armed organizations in pursuit of forming a new armed group. He spent years living along the Indian and Thai border areas, and in 2009, while based in Laiza—the stronghold of the Kachin Independence Organization (KIO)—he formally founded the Arakan Army (AA).

From his earliest involvement in the Rakhine nationalist movement, Twan Mrat Naing positioned himself as a vocal critic of Rakhine as a lackey of Bamar politics. After founding the AA, he introduced the twin doctrines —“Arakan Dream 2020” and “The Way of Rakhita”, marking the new phase in the Rakhine revolution. Even during his pre-fame years, he was respected within allied circles for his discipline, cordial manner, strategic acuity, tireless work ethic, courage, and loyalty. Over time, he has cultivated a reputation for strategic patience and reciprocal pragmatism, offering military assistance to partners when they need it. Internally, Twan Mrat Naing is credited with professionalizing the AA’s command structures, fostering unit cohesion, and consolidating his widely accepted leadership. His keen interest in science and technology has influenced the AA’s structural modernization and combat capabilities. While his broader political blueprint remains deliberately ambiguous, he has publicly floated a confederation vision. His tenure, however, is not without controversy, particularly regarding the AA’s stance on the Rohingya and his sometimes emotionally charged social-media posts. ■



APPENDIX-2**● Arakan Army's Three Tactical Innovations**

The Arakan Army (AA) fighters who first entered Rakhine honed their battlefield skills on the frontlines of Kachin and Kokang. However, once inside Rakhine, they recalibrated their tactics to suit the region's distinct terrain, adjusting their strategies, bases, and troop deployments. In one notable instance, the junta's naval superiority, once seen as a strategic asset, has proved less effective than anticipated in Rakhine. Following a bruising defeat in Kyauktaw Township, the junta's three retreating naval vessels were intercepted and sunk by AA forces on the Kaladan River. This capacity to exploit the natural landscape—to maneuver seamlessly through jungle, mountain, and waterway—has become the hallmark of the AA's tactical strength.

The AA's second major strength lies in its mastery of encirclement tactics. Whether in defense or offense, the AA makes extensive use of trench networks—some stretching for miles—to isolate and besiege junta outposts perched on mountain ridges or sprawled across open plains. Rather than launching direct assaults reliant on sheer manpower, the AA methodically surrounds its targets, cutting them off for weeks or even months. These fortified trenches not only blunt the impact of aerial bombardment but also serve as lifelines for sustaining frontline logistics, enabling prolonged operations with minimal exposure to harm.

The third strategic asset lies in its battle-hardened army and systematic cultivation of battlefield morale. Central to this approach is a strict operational ethic: no injured or fallen comrade is left behind. This practice not only reinforces cohesion and psychological resilience among troops but also minimizes the risk of intelligence breaches, ensuring that the capture of personnel or sensitive information by enemy forces is kept to a minimum. ■

APPENDIX-3

● The Rohingya Challenge

The presence of the Rohingya in northern Rakhine poses a significant governance challenge for the Arakan Army (AA). While AA leaders do not contest the Rohingya's citizenship or human rights, they remain uncompromising on matters of identity, historical narrative, and calls for self-governance—areas where tensions persist. Rohingya organizations continue to be viewed by the AA as potential security risks, and efforts to foster social cohesion remain fraught. International observers have noted that patterns of institutionalized discrimination persist. Recent proposals by Bangladesh's interim leader, Muhammad Yunus, and former Prime Minister Sheikh Hasina to establish a "safe zone" in Rakhine have been dismissed by AA officials as going too far. Meanwhile, Myanmar remains the subject of proceedings at the International Court of Justice (ICJ) over allegations of genocide—charges that the United States formally recognized in 2022.

In its June 18, 2025 report, *Bangladesh/Myanmar: The Dangers of a Rohingya Insurgency*, the International Crisis Group (ICG) cautioned that any escalation of Rohingya armed resistance against the AA is likely to backfire—intensifying intercommunal tensions in Rakhine and further undermining the already slim prospects of repatriation for nearly one million Rohingya refugees stranded in Bangladesh. The report came on the heels of reports that, in November 2024, Rohingya factions had forged a unity pact, calling for retaliation and framing their struggle as a religious jihad against the AA. Along the Bangladesh–Myanmar border, three Rohingya militants—the Arakan Rohingya Salvation Army (ARSA), the Rohingya Solidarity Organisation (RSO), and the Arakan Rohingya Army (ARA)—are known to operate with varying degrees of capacity and support. ■

APPENDIX-4

● Rakhine's Socioeconomic Landscape

Despite its coastline and wealth of natural gas and other resources, Rakhine remains one of Myanmar's poorest regions. In 2023, the United Nations Development Programme (UNDP) estimated that two-thirds (66.9 percent) of the state's population lived below the poverty line, the second most impoverished in Myanmar, compared to a national average of 49.7 percent. By 2025, the UNDP assessed that 95 percent of Rakhine's population had slipped into what it termed "regress into survival mode," a condition driven by chronic resource scarcity and deepening conflict.

Agricultural productivity remains dimly low, hampered by restricted access to fertilizers and persistent insecurity. Clashes across the state have disrupted farming and decimated fishing livelihoods. On top of the longstanding Rohingya crisis, Rakhine hosts a significant number of internally displaced persons (IDPs), with basic healthcare, medicine, and nutrition in critically short supply.

Economic paralysis has followed: jobs are scarce, trade routes are severed, inflation is rampant, and military-imposed blockades have brought formal commerce to a standstill. The UNDP has warned that in 2025, some two million people in Rakhine could face famine, with the region's economic architecture nearing collapse. Electricity, drinking water, sanitation, and children's education remain almost inaccessible. Extreme weather events also threaten every year. As far back as 2017, the Advisory Commission on Rakhine State, chaired by former UN Secretary-General Kofi Annan, identified the crisis as having threefold dimensions: humanitarian, socio-economic, and rooted in systemic human rights abuses. ■



4

ISP On Point

Prospective 4th Generation *Tatmadaw* Pathways to Reform or Further Regression?

During the ten months of Operation 1027, the Myanmar junta faced a near-collapse situation. However, it navigated this crisis by weaponizing its perceived weakness: the notion that if the center collapsed, the country would follow. Consequently, ISP-Myanmar assessed that the regime is no longer on the brink of imminent collapse. While it may not regain all lost territories in the short term, it can sustain its rule through various means. Furthermore, given the resistance's inability to offer a viable alternative, ISP-Myanmar highlighted the critical need to rigorously study the ongoing "4th Generation *Tatmadaw*" transition within the regime. This publication garnered high readership and citations.





PROSPECTIVE 4th GENERATION TATMADAW

Pathways to Reform or Further Regression?

ISP On Point No. 27
August 2025



BSO (2) Commander Lt. Gen. Naing Naing Oo overseeing the Nawngkhio battle. (Photo : Telegram/SAC-STR)

Prospective 4th Generation *Tatmadaw*¹

Pathways to Reform or Further Regression?

■ Events

The State Administration Council (SAC), which seized power under a state of emergency, did not renew its mandate. On July 31, 2025, it announced the creation of the State Security and Peace Commission (SSPC) to oversee a multi-party general election, with Senior General Min Aung Hlaing still at the helm. *BBC Burmese* reports that he is soliciting names of council members and senior officers interested in standing for the next election. The current Myanmar Armed Forces (MAF) hierarchy includes five generals and at least 20 lieutenant generals, several of whom may have to throw their hats into the ring.

¹ Since Myanmar's independence, resistance groups have shunned using the military's official Burmese name, the *Tatmadaw*. Instead, they preferred to dub it such as the "Ne Win-San Yu Army," "Burmese Army," or simply "enemy's army." Since the 2021 Spring Revolution, politicized nomenclature has gained ground. This reflects the view that some terms are never neutral: they carry political agendas and signal bias. As part of an effort to counter the regime's self-serving propaganda, which refers to itself as *Tatmadaw* with a positive connotation, the Burmese term *Sit-tat*, a generic label for the military, has come into wider use. Historically, however, *Sit-tat* was not inherently derogatory and often appeared in informal or colloquial contexts. For example, a 1951 sermon, The *Sit-tat* Sermon, delivered by the influential Buddhist monk Venerable Mahagandhayon Sayadaw Ashin Janakabhivamsa, illustrates such neutral usage. Language change can alter connotations over time, as seen in the evolving meaning of *chwe-tat* (originally a positive term for a voluntary army of civilian laborers and porters who worked with their sweat, later shifting to denote forced labor and losing its sense of dignity and hard work). In this article, ISP-Myanmar uses *Tatmadaw* to refer to the institution's official name when discussing its history and trajectory. This historical-institutionalist approach facilitates analysis of the military's self-perception, character, evolution, critical junctures, and possible futures. Whenever needed, using the term *Tatmadaw* ensures clarity, accessibility, and easy cross-referencing with existing literature and official records. The terms Myanmar Armed Forces (MAF) or Myanmar military are also used where context requires, without implying political partisanship.

■ Preliminary Analysis

The 1962 coup brought in 12 years of military rule through the Union Revolutionary Council, before the formation of the Burma Socialist Programme Party. In 1988, the military seized power again, ruling for a total of 23 years—first as the State Law and Order Restoration Council (SLORC) for nine years, then renamed the State Peace and Development Council (SPDC) until President Thein Sein's quasi-civilian government took over. In both cases, the military effectively handed authority to itself—same old, same old—but under relatively stable, controlled conditions when its grip was firm.

The shift from the SAC to the SSPC comes at the most unstable moment in the Myanmar Armed Forces' history. Public support has hit a record low, leaving civil-military relations fragile. The junta's tightly staged election plan leaves almost no room for error, either within the barracks or in civilian affairs. A slew of new laws makes its intentions clear: the Military Secrets Protection Law; the Law on the Protection of Multiparty Democratic General Elections from Obstruction, Disruption and Destruction;

the Cybersecurity Law of July 30, 2025; and amendments to the Protection of Personal Privacy and Personal Security of Citizens Law together create an environment of systematic oppression and fear. A state of emergency now covers 63 townships, suppressing resistance strongholds. The regime has dropped any pretense of change. Even after the election, little points to a "Thein Sein 2.0-style" handover. The current junta chief appears set either to rule directly or to install a loyal proxy, using every tool at his disposal to entrench his dynasty.

Debates over Myanmar's civil-military relations fall broadly into two camps. One argues that the "fascist military" must be dismantled and rebuilt from scratch, replaced by a federal armed force. The other holds that without internal reform within the MAF, the country will remain trapped in a cycle of conflict, as long as the military persists under its current leadership and insists on dominating politics. This view is common among Myanmar's neighbours, according to ISP-Myanmar research. Many fear that if the military collapses, Myanmar has no cohesive alternative force to take its place, leaving the country at risk of disintegration. Few in the region are willing to accept such a scenario. Consequently, the strategy of neighbours such as China and Thailand appears aimed at preserving central authority, prioritizing stability over political change.

Propped up from behind, the MAF survived what ISP-Myanmar called the “10-month shock to the MAF.” During the critical 10 months from the launch of Operation 1027 in October 2023 to Chinese Foreign Minister Wang Yi’s visit to Naypyitaw in August 2024, the regime faced an unprecedented shock. The phrase “not only unable to raise heads from the bunkers but facing the bunker’s collapse” came to capture more than battlefield losses. The period was defined by unraveling: public support eroded, institutions buckled, leadership faltered, and both technological and ideological foundations crumbled. Mass surrenders swept the ranks, the military lost its first regional command, and many soldiers concluded that loyalty to the leader was no longer worth the cost. In a June 2024 broadcast of *30 Minutes with the ISP*, the period for the critical condition of the Myanmar military was summed up in three words: stormy, hollowed-out, corrosion.

During this 10-month shock, both the United States and China deliberated on how to respond. In June 2024, Daniel Kritenbrink, the US Assistant Secretary of State for East Asian and Pacific Affairs, met the regime’s representatives in Vietnam. The talks produced no meaningful progress toward a political settlement. Ultimately, with China’s assistance, the regime navigated the crisis by weaponizing its weakness—the notion that if the center collapses, the country would follow (see SWOT analysis, page 8). ISP-Myanmar highlighted China’s process strategy in detail during this period

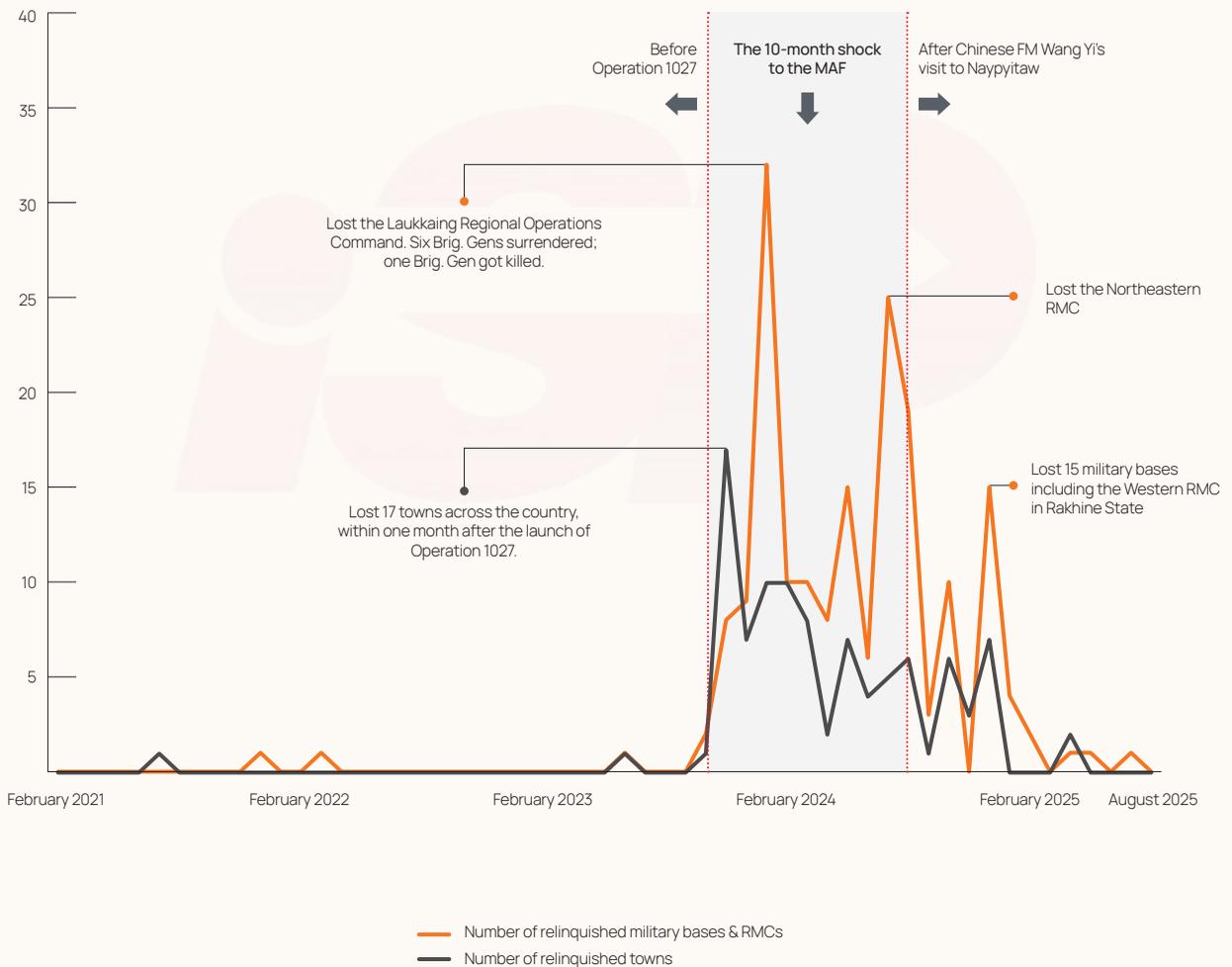


During the critical 10 months from the launch of Operation 1027 in October 2023 to Chinese Foreign Minister Wang Yi’s visit to Naypyitaw in August 2024, the regime faced an unprecedented shock.

● The 10-Month Shock to the MAF

ISP-DM2025-172

In the four and a half years since the coup, the Myanmar Armed Forces (MAF) has lost two regional military commands (RMCs), at least 184 bases, and 98 towns. Remarkably, 145 of those bases (79 percent) and 75 towns (77 percent) fell in just ten months—from November 2023, when Operation 1027 began, to August 2024. This stretch can be dubbed “the 10-Month Shock to the MAF.”

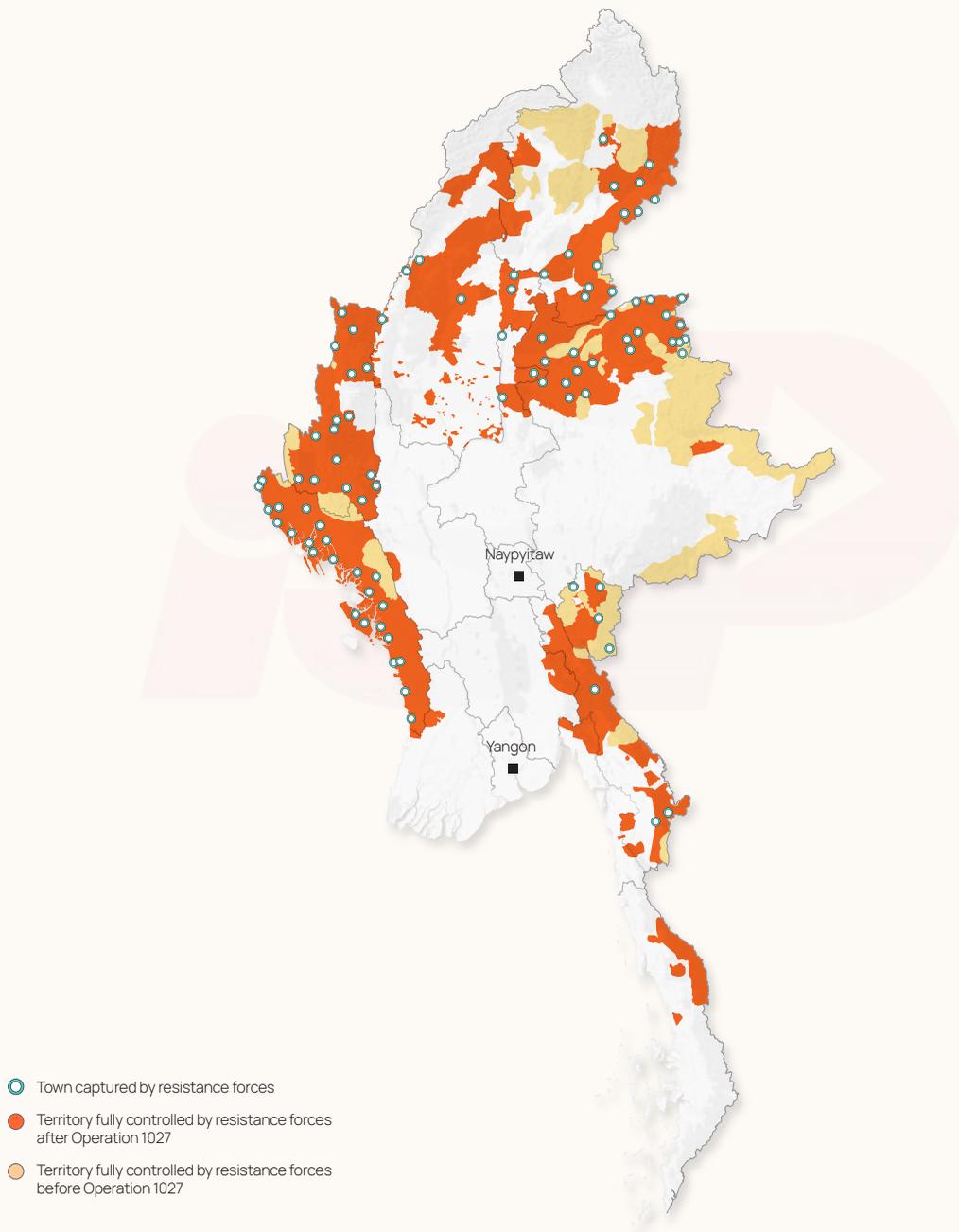


Data as of August 19, 2025, is part of research conducted by the ISP-Myanmar's Conflict, Peace, and Security Studies. It may vary from other sources due to differences in methodology and data availability.

● Resistance Forces' Control Areas Expanded

ISP-M2025-108

During the "10-month shock to the MAF," from November 2023 to August 2024, the State Administration Council (SAC) suffered major territorial setbacks. With the loss of 91 towns in 10 Months on the MAF's side, areas under full resistance control expanded significantly.



Data as of August 20, 2025, is part of research conducted by the ISP-Myanmar's Conflict, Peace, and Security Studies. It may vary from other sources due to differences in methodology and data availability. This map excludes both the active and ruling areas of armed resistance forces. It reflects only the controlled areas directly linked to Operation 1027.

● Inside the MAF's Escape Plan: A SWOT Analysis

ISP-DM2025-173

The Myanmar Armed Forces' (MAF) search for an exit can also be examined through a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats). At its weakest point, the regime faced severe losses in territorial control and a collapse of both domestic and international legitimacy [W], along with the looming threat of direct intervention from China [T]. Yet it turned these weaknesses into leverage. By exploiting the resistance's inability to present a credible and practical alternative [O], the military weaponized its own fragility—arguing that if the center fell, the state itself would collapse [W]—to carve out a path of survival. From there, it drew on the inherent advantage of incumbency [S] to blunt China's potential direct intervention [T] and even secure Beijing's support to reinforce its own strengths.



- S (Strengths) - Incumbent's advantages
- W (Weaknesses) - Weakest territorial control and lowest domestic and international legitimacy
- O (Opportunities) - Resistance forces unable to provide a more pragmatic alternative
- T (Threats) - Potential of China's direct intervention

(see ISP On Point No. 21).

Support from China and other neighbours, notably Thailand, has delivered the junta three key gains (see ISP On Point No. 22).

First, diplomatic isolation has eased: Senior General Min Aung Hlaing was able to attend the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC) summit and meet Malaysia's prime minister, the current ASEAN chair. Second, while resistance forces grapple with arms shortages caused by China's "Five Cuts" strategy, the military has secured supplies to scale up drone and airstrike operations. Third, it was able to fuse political manoeuvres—including elections—with military strategy. The impact of these advantages has become more apparent in the wake of the Sagaing-Mandalay earthquake.

On the battlefield, it could remain mired in a cycle of gains and reversals. At the strategic level, the war has reached a stalemate: neither side can be decisively beaten. Three factors explain this. First, though weaker than at any other time in its modern history, the MAF is unlikely to face an overnight collapse soon. Second,

resistance forces now hold more territory than ever before, but remain divided, without a unified command or a common political end-goal and the profits of the conflict economy, meanwhile, give many armed groups a reason to keep fighting. Third, as the US has retreated from the liberal world order, China has stepped into the geopolitical order in the region to brake Myanmar's resistance momentum. From these dynamics, a series of hypotheses arises. The MAF cannot easily recover what it has lost, but nor will it collapse; it can still coercively and manipulatively maintain control over a diminished statehood. The opposition lacks the means and cohesion to replace it with something better. Taken together, the hypothesis suggests that Myanmar's political future could hinge less on the outright defeat of the MAF and more on the prospect of reform within it. It is a bitter truth and a sobering conclusion, but one that requires moving beyond motivated reasoning—like emotional appeals to "uproot and destroy" the military regardless of circumstances—and endogeneity in thinking. Without such a shift, the search for resolution risks

ISP On Point No. 21

Seeking a Process Strategy
for Myanmar: China's Initiative



ISP On Point No. 22

The Political Economy of
Myanmar's Conflict





If the regime, bolstered by China and some neighboring states, cannot be defeated militarily in the near future (and if Myanmar's resistance war once again drags into protraction) the prospect of political change is inevitably tied to the likelihood of reform within the MAF itself.

becoming an endless Catch-22.

In reviewing recent history, since 1988, Myanmar's revolutionaries have repeatedly failed to transform social movements, such as the 1988 Democracy Movement, the Saffron Revolution of 2007, the Spring Revolution of 2021, landslide electoral victories in 1990, 2015, and 2020, and even armed advances like Operation 1027, into lasting political change. All fizzled before they could deliver irreversible political gains. Whenever a cycle of resistance and oppression reaches a stalemate, it ends with the MAF finding a way out—usually one that strengthens its hand. Myanmar's resistance or conflict is not a linear march toward its goals, but a cyclical process driven by a new generation, emerging technologies, and changing geopolitical currents.

Today, once again, the military is trying to break the stalemate of the post-2021 cycle of resistance and oppression. This time, it leans on the planned 2025–26 elections and Chinese backing to preserve its grip on power (see diagram of Four Cycles of Resistance and Oppression—and Their Disruptions on page 12). Therefore, if the regime, bolstered by China and some neighboring states, cannot be defeated militarily in the near future (and if Myanmar's resistance war once again drags into protraction) the prospect of political change is inevitably tied to the likelihood of reform within the MAF itself.

This assessment raises several questions: what would military reform look like, how might it come about, and who could drive it? At its heart, reform would mean the army's retreat from politics—something long demanded by the Myanmar public. Whether that retreat happens immediately or in stages will depend on two factors: first, the balance of power, including the strength of public support, available resources, and foreign alliances, and second, the effectiveness of the negotiation skills employed by the parties involved in the conflict. For now, there is little sign that Senior General Min Aung Hlaing intends to pursue MAF reform. Therefore, it is even more crucial to examine the potential for generational change within the MAF—and the possible policy shifts that could result.

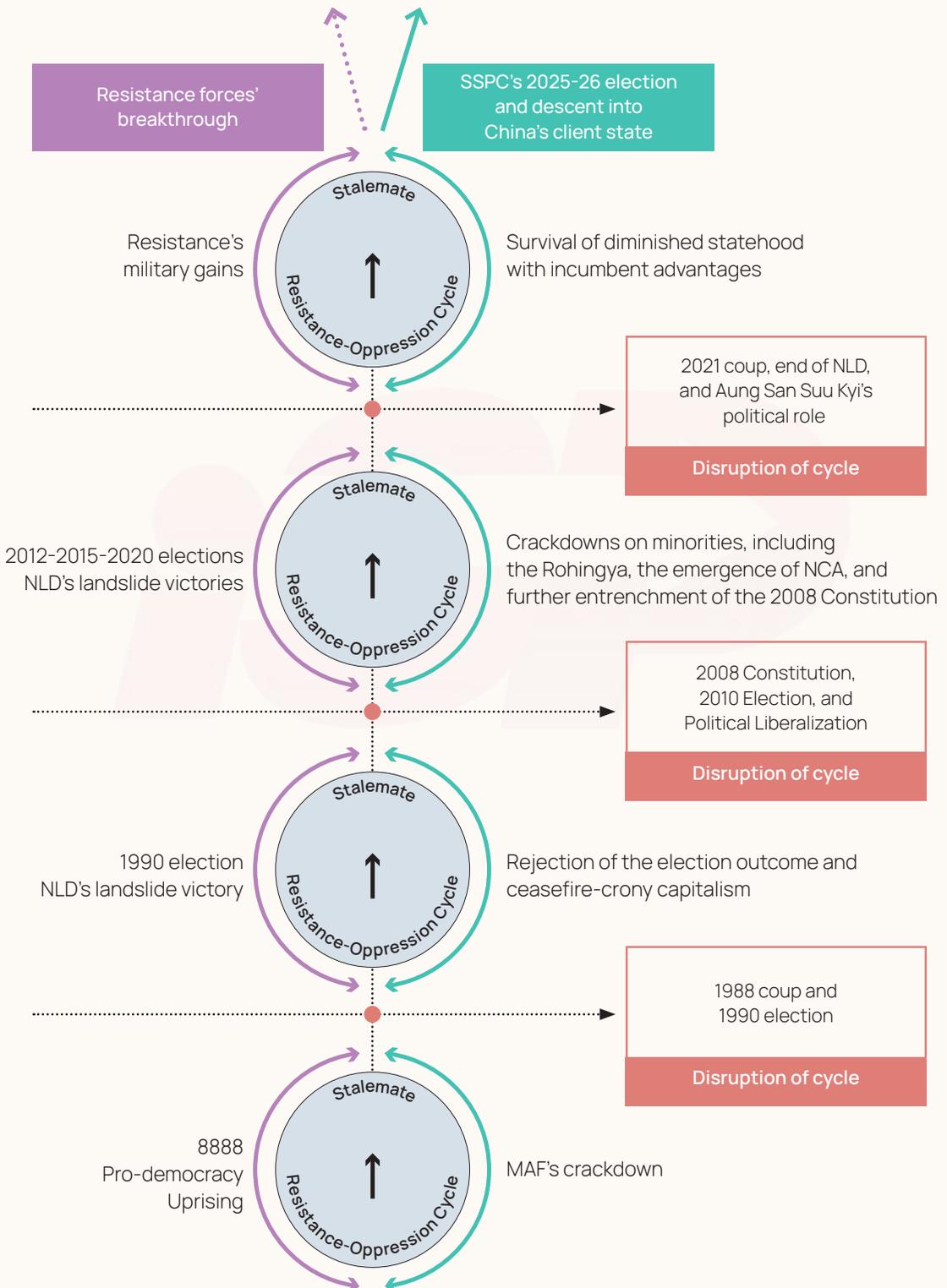
The *Tatmadaw* can be observed in three distinct generational phases. The first generation (1940–88) was dominated by the Thirty Comrades, the independence-era fighters who founded the army. The second (1988–2011) was led by Senior General Than Shwe during the SLORC and SPDC years. The third (2021–present) is under the single-handed command of Senior General Min Aung Hlaing. Although General Aung San is revered as the father of the *Tatmadaw*, his influence is largely symbolic; the institution's real architect was General Ne Win, one of the Thirty Comrades, who set its doctrine and character for decades. Under Ne Win, the *Tatmadaw* shifted from an anti-colonial liberation force to a serial coup-maker, embedding itself in politics and adopting the mantle of a socialist-authoritarian state. His first-generation rule was marked by strident Bamar-

chauvinist ideology, a closed economy, authoritarian consolidation, and isolationist state. Civil-military relations were defined by repression. Deprived of legitimacy, the regime eventually collapsed under the weight of the 1988 pro-democracy uprising—bringing an end to the *Tatmadaw*'s first generation.

Although Senior General Saw Maung fronted the 1988 coup, it was his successor, Senior General Than Shwe, who came to define the *Tatmadaw*'s second generation. With a long grip on power, he shaped both the army's image and its institutional character. Under his rule, the military cast itself as guarantor of "law and order," brokered ceasefires with ethnic armed groups, and entrenched its political dominance through the 2008 Constitution. The regime prioritized pragmatism over ideology—strengthening the military as an institution while extending its reach through a crony-capitalist system. Than Shwe combined tight strategic control with tactical flexibility, often "playing both fire and water." Yet repression remained the default in civil-military relations, eroding public support. The 2007 Saffron Revolution and the disastrous response to Cyclone Nargis, which left hundreds of thousands dead, exposed the regime's weakness. As a means to manage political transition, the *Tatmadaw*'s second generation withdrew from direct military rule, instead embedding itself in politics through the power granted by the

● Four Cycles of Resistance and Oppression—and Their Disruptions

ISP-DM2025-174



2008 Constitution.

The *Tatmadaw's* third generation is led by Senior General Min Aung Hlaing, who seized power in 2021. His rule has reversed the limited political liberalization introduced by his predecessors.

While professing to defend the 2008 Constitution, the very act of seizing power could be legally argued as a violation of that charter. This generation is defined by regression: from a quasi-civilian government to a dictatorship rooted in personal ambition, nationwide uprisings, full-blown civil war, and unprecedented battlefield defeats. Despite gestures toward populism, the regime has consistently failed to meet popular demands. Adopting a strategy of expediency, it has focused narrowly on survival—avoiding collapse and muddling through the crisis—while leaning on China and Russia for diplomatic cover. On the civil-military relations front, Min Aung Hlaing has chosen repression over pragmatic compromise, igniting resistance and driving public support for the *Tatmadaw* to historic lows.

Despite differences in leadership style, public support, engagement with ethnic groups, and shifting international contexts, all three generations of the *Tatmadaw* have shared one conviction: that they are the guardians of the state—a role assumed as much as imposed. The question now is whether this self-appointed mission will endure into a fourth generation of military leadership.

■ Scenario Forecast

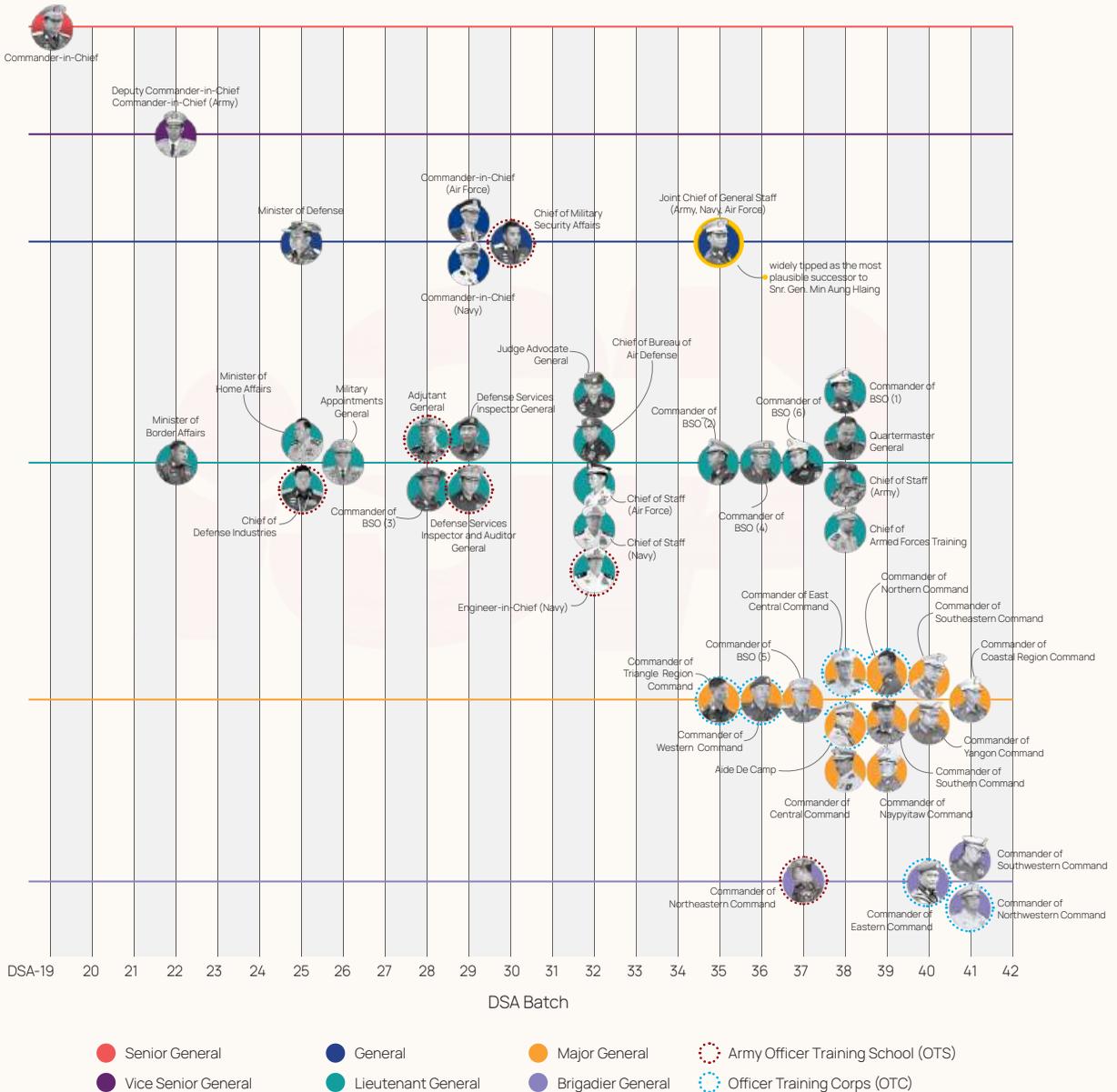
The prospect of a fourth-generation *Tatmadaw* raises several questions: is such a transition possible, how might it unfold, who would lead it, and what priorities would it pursue? If one assumes the military will not collapse in the near future (assuming it remains difficult to decisively defeat or dismantle the military in a short term), such a generational shift is inevitable; the only question is when. Rather than emerging from an internal counter-coup (except for the unexpected retirement of Senior General Min Aung Hlaing), it is more likely to follow the elections, after a period of adjustment. Its timing will hinge largely on the outcome of post-election negotiations and compromises between the main resistance forces and the regime.

General Kyaw Swar Lin of Defence Services Academy (DSA) Batch 35 is widely tipped as the most plausible successor, though some caution that those appearing too favored rarely prevail. He could act as a guarantor of Min Aung Hlaing and serve as a transitional commander-in-chief. This might entail retiring officers senior to Batch 35, with the core of the fourth-generation leadership drawn from Batch 38 officers (such as Lt. Gen. Ko Ko Oo, Lt. Gen. Than Htike, Lt. Gen. Htein Win, and Lt. Gen. Zaw Hein, etc.) and RMC commanders from Batches 40 and 41 are also likely to play pivotal roles in shaping the next tier of leadership.

● Generational Gaps at the Top

ISP-DM2025-175

Five generals and at least 20 lieutenant generals form the core command under Senior General Min Aung Hlaing and Vice Senior General Soe Win. Among them are at least four generals and fourteen lieutenant generals, each approximately a decade junior to the junta leader.

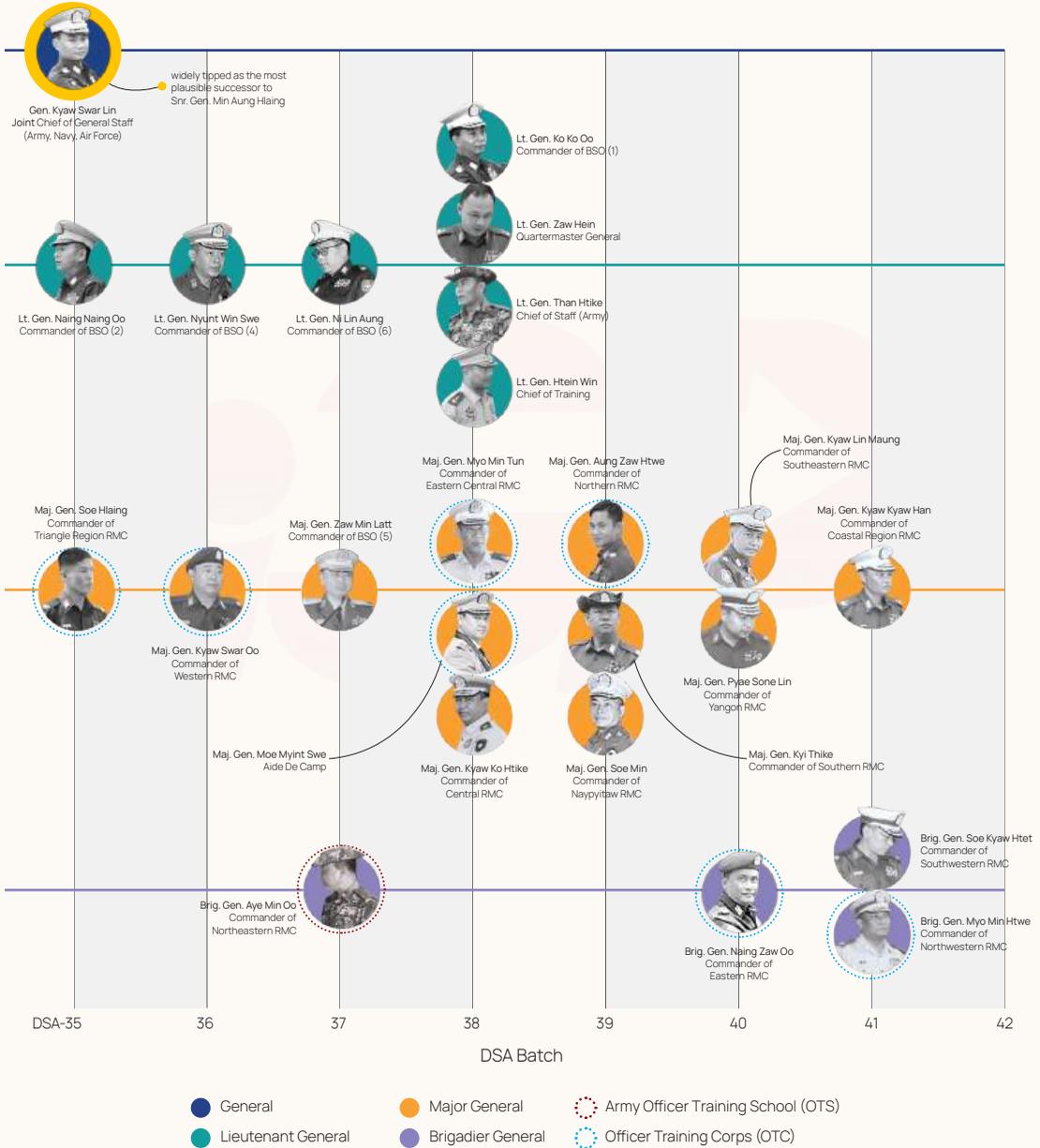


Data as of August 24, 2025, is part of research conducted by the ISP-Myanmar's Conflict, Peace, and Security Studies. It may vary from other sources due to differences in methodology and data availability. Military personnel who are not DSA graduates are assigned an equivalent DSA batch based on their commissioning year.

● Potential 4th Generation Regime: Generals Next in Line

ISP-DM2025-176

If Gen. Kyaw Swar Lin, appointed Joint Chief of the General Staff (Army, Navy and Air Force) in December 2024, were to succeed Snr. Gen. Min Aung Hlaing, it could open the door for officers from Batch 35 of the Defence Services Academy (and younger) to take the reins of a fourth generation of military rule.

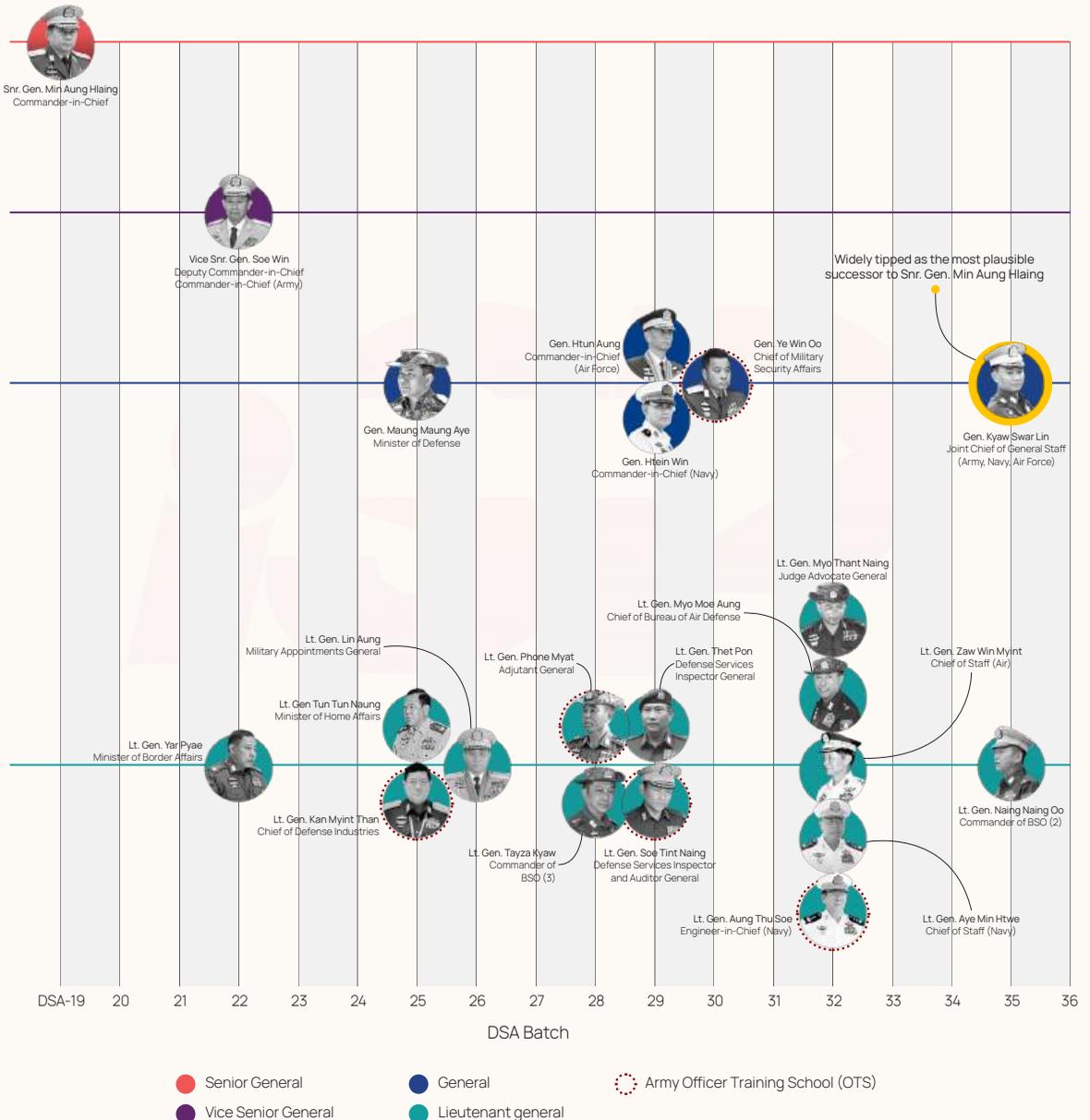


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● A Gap in the Ranks: 16 Batches Apart Between No. 1 and No. 3

ISP-DM2025-177

Snr. Gen. Min Aung Hlaing, the regime's first-in-command, is separated by a 16-batch gap from his third-ranked subordinate, Gen. Kyaw Swar Lin. The junta chief hails from DSA Batch 19, while Kyaw Swar Lin belongs to Batch 35.



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For now, it is difficult to predict what course a fourth-generation *Tatmadaw* might take. Though, three tendencies are already visible. First, survival under Senior General Min Aung Hlaing, with officers displaying unflinching loyalty to avoid being purged, sidelined, or worse. Second, an ambition to rebuild and strengthen the armed forces after years of attrition. Third, a conviction that ethnic armed organisations are not genuine in their calls for democracy or federalism, but instead exploit armed struggle to inflame anti-Bamar sentiment, pursue economic interests, and destabilise the state—thereby justifying a revival of Bamar nationalism. Like their predecessors, the fourth generation is therefore likely to see itself as the nation's self-appointed guardian. The difference, if any, may only be a matter of degree, with little substantial change in essence.

Potential fourth-generation commanders have already built personal economic networks and patronage systems, often through patron-client ties. Promotion would be swifter if they can be seen crushing the resistance and securing clear victories. Many expect that, after the election, if Senior General Min Aung Hlaing were to transition from commander-in-chief to a civilian presidency, he would hand over day-to-day military management to a trusted aid, allowing the fourth generation to assume control gradually. Yet there are fears he may cling to power, either through the newly created State Security and Peace Commission (SSPC) or a body modeled on China's Central Military Commission. They also fear arbitrary purges without mercy, such as the case of General Moe Myint Tun. Min Aung Hlaing's

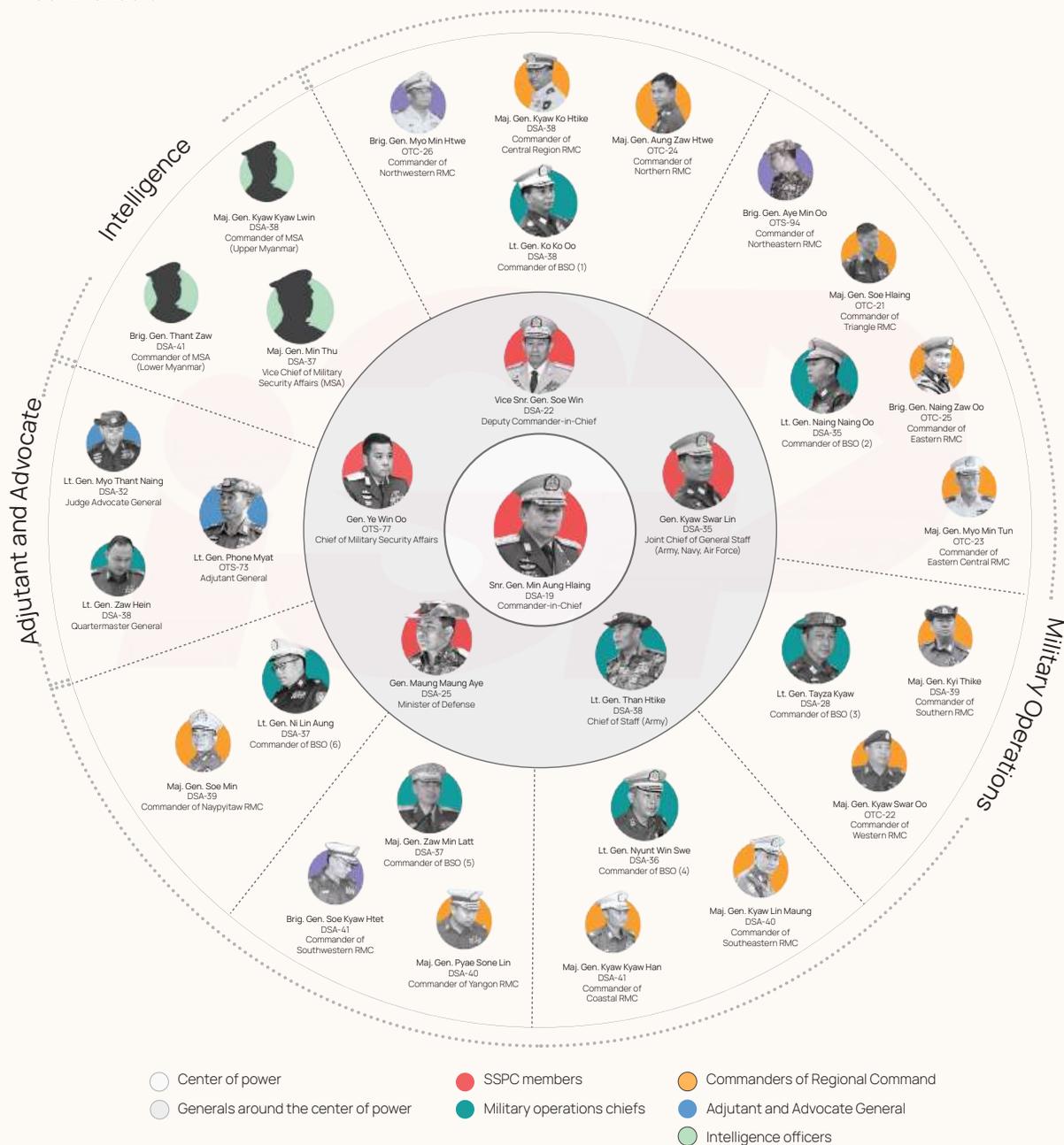
divide-and-rule tactics appear aimed at preventing potential successors from uniting against him. All are bound together by a system of collective responsibility for wartime atrocities, ensuring all senior officer are complicit in war crimes. How firmly this emerging generation defends the 2008 Constitution will be the key test of its political intent.

To summarize, the changes announced by the SAC at the end of July chiefly signal that the current commander-in-chief is using every available lever to prolong his rule. The evidence suggests three main points. First, the *Tatmadaw* is unlikely to collapse in the near term. Second, while it cannot easily recover lost territory, it will likely continue to dominate a diminished state, coexisting with de facto rival power centers and ruling through a blend of coercion and manipulation. Third, as the resistance forces cannot yet replace the MAF with a stronger alternative and remain fragmented, the hardline resistance groups vow to persist the revolution for future generations. Taken together, these hypotheses suggest that Myanmar's political future hinges on a fourth-generation transition within the MAF—whether this cohort heeds public demands for withdrawal from politics, and whether resistance forces can muster the pressure and incentives to force such a shift, remain open questions. If so, systematic and unbiased strategic study of the *Tatmadaw*—and of Naypyitawlogy, the study of Naypyitaw—becomes essential for both the resistance and the international community. Without it, Myanmar risks repeating a familiar pattern of wilful blindness: ignoring what is in plain sight and refusing to acknowledge what is already known. ■

● New Bloods in the Regime's Leadership

ISP-DM2025-178

Senior General Min Aung Hlaing has promoted many generals from significantly younger cohorts to key positions. A generational gap of about a decade separates him from his Joint Chief of the General Staff (Army, Navy, and Air Force), as well as from the Chiefs of the Bureau of Special Operations and the Regional Military Commanders.



Data as of August 24, 2025, is part of research conducted by the ISP-Myanmar's Conflict, Peace, and Security Studies. It may vary from other sources due to differences in methodology and data availability.

● Key Generals and Lieutenant Generals in the Regime

ISP-DM2025-179

Five generals and at least 20 lieutenant generals form the core of the command structure under Commander-in-Chief Senior General Min Aung Hlaing and Deputy Commander-in-Chief Vice Senior General Soe Win.

SENIOR GENERAL		VICE SENIOR GENERAL		
 Snr. Gen. Min Aung Hlaing DSA-19 Commander-in-Chief		 Vice Snr. Gen. Soe Win DSA-22 Deputy Commander-in-Chief		
FIVE GENERALS				
 Gen. Maung Maung Aye DSA-25 Minister of Defense	 Gen. Htun Aung DSA-29 Commander-in-Chief (Air Force)	 Gen. Htein Win DSA-29 Commander-in-Chief (Navy)	 Gen. Ye Win Oo OTS-77 Chief of Military Security Affairs	 Gen. Kyaw Swar Lin DSA-35 Joint Chief of General Staff (Army, Navy, Air Force)
20 LIEUTENANT GENERALS				
 Lt. Gen. Yar Pyae DSA-22 Minister of Border Affairs	 Lt. Gen. Tun Tun Naung DSA-25 Minister of Home Affairs	 Lt. Gen. Kan Myint Than OTS-66 Chief of Defense Industries	 Lt. Gen. Lin Aung DSA-26 Military Appointments General	 Lt. Gen. Tayza Kyaw DSA-28 Commander of BSO (3)
 Lt. Gen. Phone Myat OTS-73 Adjutant General	 Lt. Gen. Thet Pon DSA-29 Defense Services Inspector General	 Lt. Gen. Soe Tint Naing OTS-75 Defense Services Inspector and Auditor General	 Lt. Gen. Myo Thant Naing DSA-32 Judge Advocate General	 Lt. Gen. Myo Moe Aung DSA-32 Chief of Bureau of Air Defense
 Lt. Gen. Zaw Win Myint DSA-32 Chief of Staff (Air)	 Lt. Gen. Aye Min Htwe DSA-32 Chief of Staff (Navy)	 Lt. Gen. Aung Thu Soe OTS-81 Engineer-in-Chief (Navy)	 Lt. Gen. Naing Naing Oo DSA-35 Commander of BSO (2)	 Lt. Gen. Nyunt Win Swe DSA-36 Commander of BSO (4)
 Lt. Gen. Ni Lin Aung DSA-37 Commander of BSO (6)	 Lt. Gen. Ko Ko Oo DSA-38 Commander of BSO (1)	 Lt. Gen. Zaw Hein DSA-38 Quartermaster General	 Lt. Gen. Htike DSA-38 Chief of Staff (Army)	 Lt. Gen. Htein Win DSA-38 Chief of Training

Data as of August 24, 2025, is part of research conducted by the ISP-Myanmar's Conflict, Peace, and Security Studies. It may vary from other sources due to differences in methodology and data availability.

● Key Army Generals

ISP-DM2025-180

The regime's military ranks include 12 Major Generals and four Brigadier Generals who play pivotal roles in the army's command structure. They are 14 regional military commanders overseeing operations nationwide, Maj. Gen. Zaw Min Latt, the commander of BSO (5), and Maj. Gen. Moe Myint Swe, the junta leader's aide de camp. Despite holding the same rank as their peers, Maj. Gen. Zaw Min Latt, and Maj. Gen. Moe Myint Swe, wield more influence within the regime because of the nature of their roles.

12 MAJOR GENERALS



Maj. Gen. Zaw Min Latt
DSA-37
Commander of BSO (5)



Maj. Gen. Moe Myint Swe
OTC-25
Aide De Camp



Maj. Gen. Soe Hlaing
OTC-21
Commander of
Triangle RMC



Maj. Gen. Kyaw Swar Oo
OTC-22
Commander of
Western RMC



Maj. Gen. Myo Min Tun
OTC-23
Commander of
Eastern Central RMC



Maj. Gen. Aung Zaw Htwe
OTC-24
Commander of
Northern RMC



Maj. Gen. Kyaw Ko Htike
DSA-38
Commander of
Central RMC



Maj. Gen. Kyi Thike
DSA-39
Commander of
Southern RMC



Maj. Gen. Soe Min
DSA-39
Commander of
Naypyitaw RMC



Maj. Gen. Kyaw Lin Maung
DSA-40
Commander of
Southeastern RMC



Maj. Gen. Pyae Sone Lin
DSA-40
Commander of
Yangon RMC



Maj. Gen. Kyaw Kyaw Han
DSA-41
Commander of
Coastal RMC

FOUR BRIGADIER GENERALS



Brig. Gen. Aye Min Oo
OTS-94
Commander of
Northeastern RMC



Brig. Gen. Naing Zaw Oo
OTC-25
Commander of
Eastern RMC



Brig. Gen. Myo Min Htwe
OTC-26
Commander of
Northwestern RMC



Brig. Gen. Soe Kyaw Htet
DSA-41
Commander of
Southwestern RMC

● The 10-Month Shock to the MAF: A Timeline

ISP-DM2025-181

Between Operation 1027 in November 2023 and August 2024, the junta endured what can be dubbed “the 10-Month Shock to the MAF.” In this period, it lost control of more than 145 military camps and 75 towns.



Data from October 2023 to August 2024, is part of research conducted by the ISP-Myanmar's Conflict, Peace, and Security Studies. It may vary from other sources due to differences in methodology and data availability.



5

ISP Conflict & Security Tracker

95 Civilian Massacres Recorded Since the Coup

ISP-Myanmar has tracked and documented incidents of mass civilian killings during the conflict, defined as events in which ten or more people are killed—most often by the regime’s shelling, arson, or airstrikes. Civilians in resistance-held areas and zones of high military tension face the greatest risk. As religious buildings, hospitals, schools, and homes are all being targeted, the capacity to protect civilians has reached a critical low.





ISP Conflict & Security Tracker 2025
Conflict, Peace and Security Studies
CST2025-02 | December 11, 2025

95 CIVILIAN MASSACRES RECORDED SINCE THE COUP

Of these, 91 cases were committed by the Myanmar junta forces, killing 1,776 civilians. In contrast, resistance forces were responsible for four incidents, leaving 85 dead. These conditions indicate that the levels of civilian protection during conflict are extremely challenging.



95 Civilian Massacres Recorded Since the Coup

Period	February 1, 2021, to December 9, 2025
Incidents/events	During nearly five years, at least 95 incidents of mass civilian killings—defined as single events in which 10 or more people were killed—have claimed at least 1,861 lives. This toll includes two recent attacks: one in Ma Ya Kan village, Tabayin Township, Sagaing Region, on December 5, and another in Myit Son village, Mongmit Township, Shan State, on December 6.
Locations	Massacres have occurred across the country, except for the Yangon Region. Sagaing Region recorded the highest number of incidents, at 41.
Actors involved	Myanmar junta forces and armed resistance forces.
Types	Mass civilian deaths caused by armed assaults, arson, and airstrikes.
Status/trends	Of total incidents, 91 were perpetrated by the regime's troops, resulting in 1,776 civilian deaths. Resistance forces were responsible for the other four incidents, which resulted in 85 civilian fatalities. Airstrikes were the most common method, accounting for 59 percent of deaths. These mass casualty events may continue as the junta intensifies ground offensives and intensifies its use of fighter jets, combat helicopters, and drones.
Risk Level	Civilians residing in resistance-controlled or contested territories face the greatest risk. The junta's strikes targeted civilian properties, religious sites, hospitals, and schools. Consequently, these conditions indicate that the levels of civilian protection during conflict are extremely challenging.
Implications	Placing military victory above all else—and operating as pre-emptive strikes with indiscriminate attacks—carries serious consequences. By prioritizing battlefield gains alone, the perpetrators risk further entrenching their record of war crimes, likely driving up civilian casualties and cases of domicile.

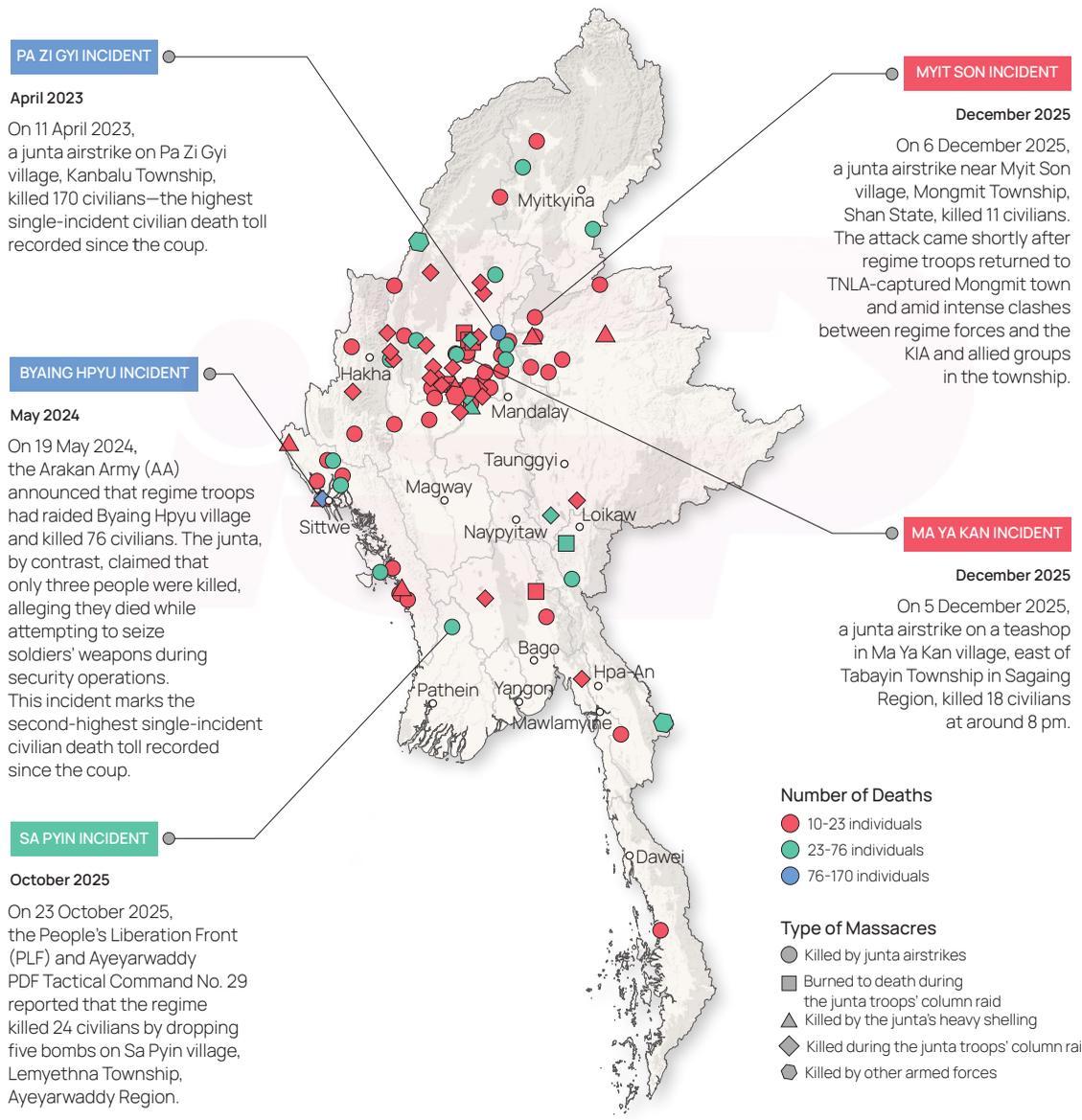
This Conflict Security Tracker No. 2 English Version was published on December 11, 2025, as a translation of the original Burmese version published on December 10, 2025. Figures reflect data available up to December 9, 2025.

A recent major incident, the airstrike on Mrauk-U General Hospital in Rakhine State at 9:13 pm on December 10, which killed more than 33 civilians, falls outside this reporting period and is not included. If counted, the total would rise to 96 incidents and more than 1,894 deaths.

● Airstrikes Account for Over Half of Mass Killings

ISP-M2025-118

Since the coup, 95 documented civilian massacres have claimed at least 1,861 lives. Junta airstrikes were the most common method, accounting for 59 percent of these deaths. The pattern of attacks appears to serve three objectives: disrupting the emerging administrative structures of the resistance, striking key revenue sources—particularly mining sites—and preventing any sense of security from taking hold in resistance-controlled areas.



Data from February 1, 2021, to December 9, 2025, is part of research conducted by the ISP-Myanmar's Conflict, Peace, and Security Studies. For this dataset, a massacre is defined as an incident involving the killing of 10 or more civilians in a single event. All incidents are included regardless of the method used, including armed assault, arson, airstrikes, and other means. Data is collected following ISP-Myanmar's protocol for documenting information on armed conflicts.

6

30 Minutes with the ISP

Myanmar's Rare Earths: Cries Behind Critical Minerals

Following the coup, rare-earth mining in Kachin State has expanded rapidly, with Chinese companies playing a central role. China's "earthquake diplomacy" after the Mandalay–Sagaing quake—swift humanitarian aid and visible disaster relief—stood in sharp contrast to its conduct in the mining sector. Here, unregulated extraction has brought little economic benefit to local communities, while leaving them to bear the environmental and health costs. This *30 Minutes with the ISP* episode explored why China should apply the same standards of responsibility and accountability to resource extraction as it projects in its disaster relief efforts. The discussion drew strong interest from ISP-Myanmar's audiences.





ISP CONFLICT ECONOMY STUDIES

July 2025

Myanmar's Rare Earths:
**CRIES BEHIND
CRITICAL MINERALS**



CONCEPT NOTE

The global shift to green energy hinges on a handful of critical minerals, and Myanmar has become a key supplier in this emerging race. In other words, as the global race to renewable energy accelerates, advanced magnets are in increasingly high demand. The rare earth minerals indispensable for these magnetic and conductive materials are being extracted from Myanmar's conflict-ridden northern regions. China, which controls, refines, produces, and stockpiles nearly 90 percent of the world's rare earth supply, has long sourced a significant share of its raw materials from Myanmar's northern border regions. On the other side of the unregulated and illegal extractions, the environmental toll has been steep: soil, water, and air contamination from toxic chemicals has devastated local communities and rendered traditional livelihoods untenable. Streams once vital for drinking and irrigation now flow murky with toxins.

Research findings by ISP-Myanmar identified more than 370 rare earth mining sites and 2,700 in situ leaching collection ponds in Kachin State's Chipwi and Momauk townships, the epicenter of Myanmar's rare earth extraction. Over 240 of these sites (66 percent) were developed after the 2021 military coup. The total area of operations now exceeds the size of Singapore. Myanmar has exported over 290,000 tonnes of rare earths to China in total, with nearly 170,000 tonnes shipped in the years following the coup.

While this research was being conducted, the devastating Mandalay-Sagaing Earthquake struck on March 28, 2025, resulting in significant loss of life and destruction. In its immediate aftermath, China was among the first to dispatch substantial rescue teams and humanitarian aid—a gesture that was deeply appreciated by the Myanmar communities affected by the disaster. Chinese citizens also provided committed support, with rescue teams displaying advanced technology and a high level of coordination. Their efforts closely reflected Myanmar's esteemed

- ▶ “Four Sangaha Principles” (four means of sustaining a favorable relationship), notably *dana* (generous material support) and *samanattata* (treating others as equals). From a national perspective, China and its people conducted “earthquake diplomacy” with notable precision and generosity, earning the trust, respect, and reliance of many in Myanmar.

At the same time, China’s broader handling of post-coup dynamics in Myanmar—particularly its role in facilitating the return of Lashio, which had come under the control of the Myanmar National Democratic Alliance Army (MNDAA), to the State Administration Council (SAC)—sparked considerable public debate and scrutiny.

Yet, the less visible side of Myanmar’s conflict-driven economy warrants equal attention. A stark contrast emerges when comparing China’s role in post-earthquake relief with its involvement in extracting rare earth minerals, often kept out of public view. The local community derives little to no benefit from these lucrative operations. Instead, they face repression and militarized rule under the sway of armed groups, deepening their hardship. Forced displacement is common; families are uprooted, crops and livestock perish, and health crises follow. If a powerful neighbour like China—so visibly aligned with the spirit of the “Sangaha Principles” in its earthquake response—were to apply similarly high standards of responsibility and care in its mining ventures, it could pave the way for a more equitable arrangement that benefits both sides.

This week’s *30 Minutes with the ISP* program focused on China’s role in Myanmar’s rare earth mining. From a research perspective, we also highlighted the often-overlooked hardships faced by local communities affected by these operations and explored their hopes and concerns. ■

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30 MINUTES
with the **ISP**

Myanmar's Rare Earths:

CRIES BEHIND CRITICAL MINERALS



Nan Lwin

Program Head
China Studies
Lead Panelist



Kaung San

Program Associate
China Studies
Co-panelist



Su Lin Han

Program Assistant
Communications Department
Host

This event was held on April 26, 2025, exclusively for ISP Gabyin Community members. The recorded video of the event is available on ISP-Myanmar's YouTube Channel with English subtitles. DVB broadcasts the recorded video with English subtitles of the live event on its TV and social media channels regularly on Mondays and Wednesdays.



Su Lin Han

Program Assistant
Communications Department
Host

Greetings to all Gabyin members joining today's *30 Minutes with the ISP* program. I'm Su Lin Han, and I'll be your host for today's event. This is the eighth episode of our *30 Minutes with the ISP* series. Our discussion will be presented under the topic: "Myanmar's Rare Earth: Cries Behind Critical Minerals." Leading today's

discussion are our panelists from ISP-Myanmar's China Studies Program, Nan Lwin and Kaung San. Alright, let's begin. I would like to invite our lead panelist, Nan Lwin, to kickstart the discussion.



Nan Lwin

Program Head
China Studies
Lead Panelist

Greetings to all friends joining today's *30 Minutes with the ISP* program. Today's discussion will mainly focus on China's role in Myanmar's rare earth mining. Before we dig into that, I'd like to touch on China's current involvement in Myanmar briefly. After that, we'll explore the importance of Myanmar's rare earth minerals to

China, the hardships local communities face from mining activities, and what these communities want and prefer.

First, let's take a look at China's involvement in Myanmar's ongoing conflict. China's role in Myanmar's peace process and conflict resolution can be seen as a new approach. The Chinese Special Envoy personally overseeing the ceasefire between the SAC and MNDAA, and facilitating the return of Lashio to the SAC, while providing ardent earthquake relief, are particularly notable. China's approach reminds us of the beginning of the British colonial era after the Konbaung Dynasty, when the British annexed Myanmar and ruled the occupied territories through appointing a commissioner. Looking at how China handles the northern Shan State issue, it suggests a new model of ceasefire, coercive dividing of administrative authority between the SAC and EAOs. This model differs from the post-1990 ceasefire model and represents a new paradigm. The northern Shan State is critical to China for security, trade, and strategic projects. That's why China is making these efforts.

Looking at the current ceasefire monitoring, China seems to prioritize economic development then the peace process and aims to gradually shape political outcomes, such as

▶ conducting elections, finally, which could serve as an exit strategy for the SAC. This peace-through-development model raises questions and hints that a resource-based war economy could grow stronger. China's interests are intricately interwoven, like a spider's web, across many sectors and regions in Myanmar, both in perception and empirical reality. When we talk about China's interests in Myanmar, people often think of expanding geopolitical influence, infrastructure, and economic corridors. We cannot overlook issues like widespread extraction of natural resources, such as rare earth mining, that come hand in hand with ongoing conflict. It also gives China more geographic and diplomatic advantages.

Rare earths generally include around 17 types of minerals. Our studies show critical minerals, are extracted in Kachin: Dysprosium (Dy) and Terbium (Tb). These elements are crucial for high-tech products worldwide, including EVs, defense, military equipment, and green energy technologies. According to our data, Myanmar's rare earth exports to China exceeded USD 3.6 billion in the past four years. That's over five times higher than the same period before the coup.

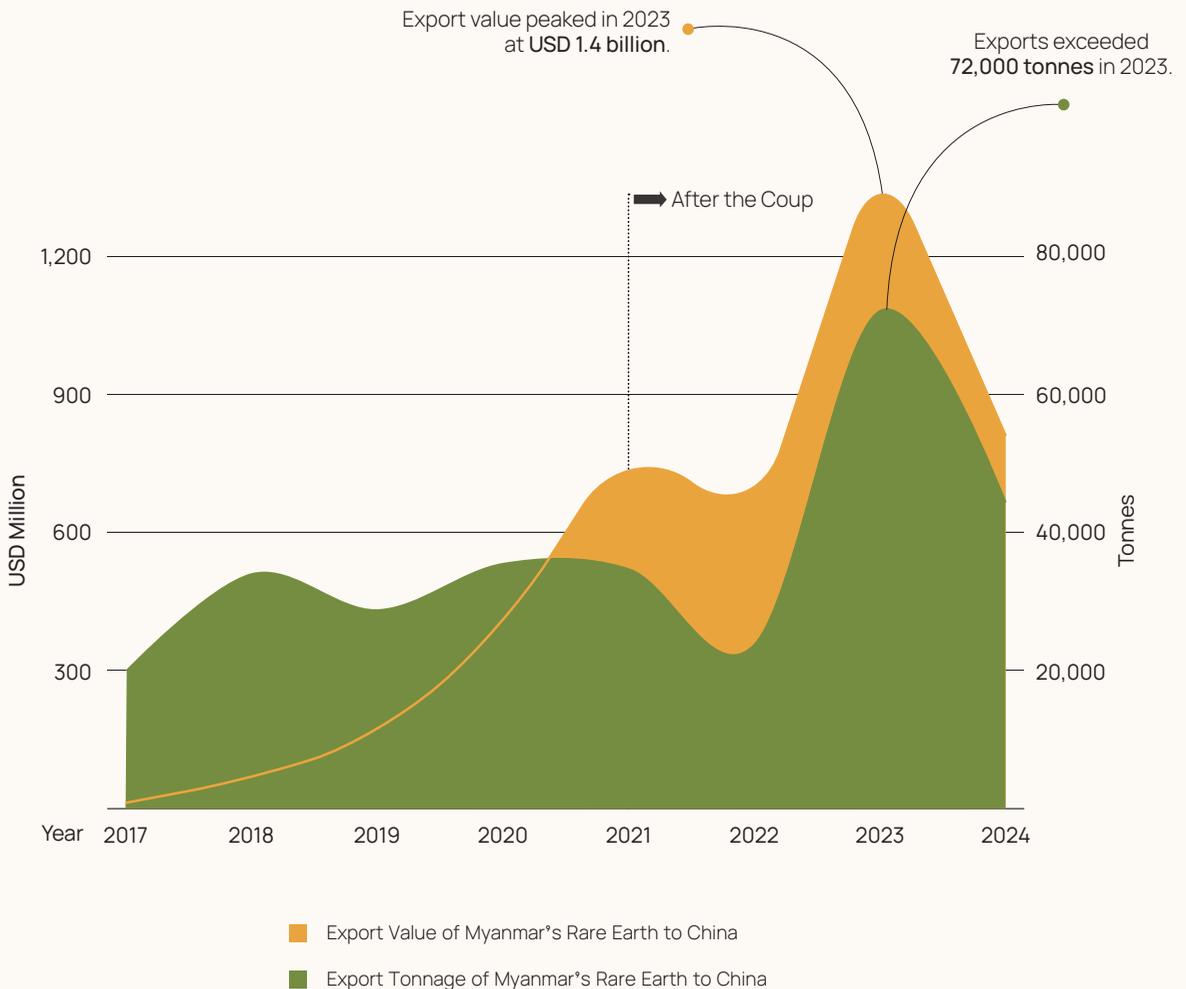
Satellite imagery shows at least 370 mining sites in Kachin, mainly in Chipwi and Momauk townships. These sites contain nearly 3,000

in situ leaching ponds for mineral extraction. More than half of these sites emerged after the coup. China accounts for 60-70 percent of global rare earth production. For refined rare earths, the figure is nearly 90 percent of the global production. Around half of these come from raw minerals sourced in Myanmar. Thus, Myanmar's rare earths are key to the China-led global supply chain. This is also tied to why mining has expedited production since the coup. At the same time, increased mining activities have caused rising hardship for local communities.

Kaung San will now continue with this section.

Rare Earth Exports to China Increased Fivefold After the Coup

Rare earth exports from Myanmar to China have increased **fivefold** in the **four years** since the coup, reaching **USD 3.6 billion**. During the post-coup period, **more than 170,000 tonnes** were exported to China.



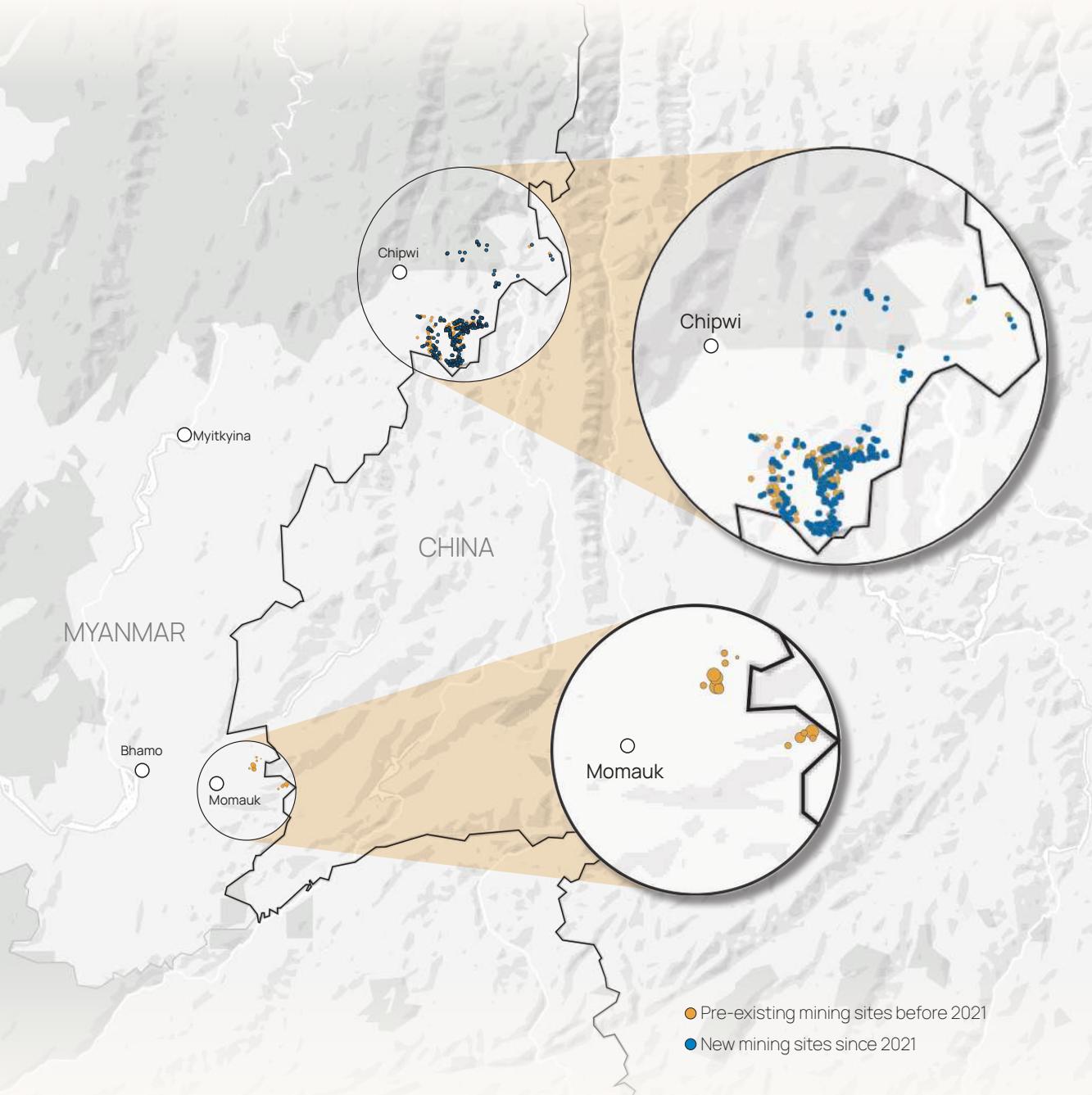
Note: Data from January 2017 to December 2024 are based on the data from the General Administration of Customs of China (GACC).

Over 245 New Mining Sites in Kachin Since the Coup

ISP Mapping Number 93

ISP Mapping

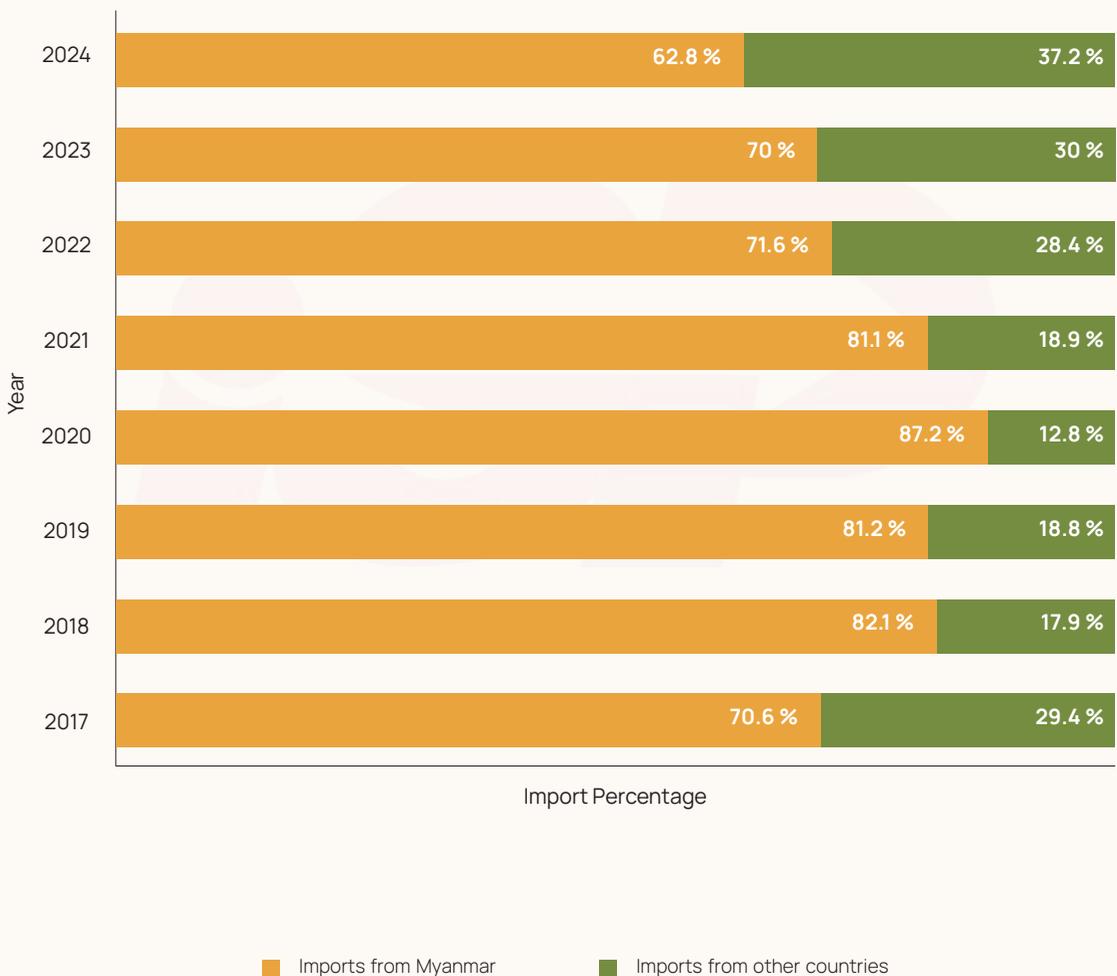
Following the 2021 coup, the number of rare earth mining sites in Kachin State rose from 126 to over 371—an increase of 245 sites, nearly doubling the total since the pre-coup period.



Note: Data as of December 2024 are based on ISP-Myanmar's research and may vary from other sources due to differences in methodology and data availability.

Myanmar: China's Largest Supplier of Rare Earths

On average, Myanmar was the largest supplier of rare earth minerals to China from 2017 to 2024 by volume. Myanmar's rare earth minerals account for approximately **two-thirds** of China's annual rare earth imports. From January 2017 to December 2024, Myanmar exported **over 290,000 tonnes** of rare earth to China. Of these, **over 170,000 tonnes** were exported after the coup.



Note: Data from January 2017 to December 2024 are based on the data from the General Administration of Customs of China (GACC).



Kaung San

Program Associate
China Studies
Co-panelist

The rare earth minerals are worth billions of USD, but their negative impacts are significant as well. These impacts are felt most by the local communities in Kachin State—especially in Chipwi, Pangwa, and Momauk. I'd like to highlight three key findings from our research. First, serious environmental damage is harming public health.

Second, livelihood loss is leading to social hardship. Third, human rights violations by authorities and mining companies are undermining socio-economic conditions and disrupting social harmony, leading to both physical and psychological insecurity.

Firstly, the environmental damage mainly involves the pollution of water resources and soil. In the mountains where rare earths are mined, they drill holes, dig pits, and pour in chemicals that harm the environment.

The chemicals seep into the soil and are easily discharged into nearby streams. As a result, the stream water becomes polluted. Next, we've also seen noticeable changes in Pangwa's landscape due to mining expansion. The terrain has significantly changed in a rare earth mining site in Pangwa due to these expansions. Satellite images from Chipwi and Pangwa show widespread land transformation. There are barren hills and forest patches left looking like open wounds. In Chipwi Township, locals say the Chipwi Stream now smells foul, to the point where marine animals are dying. Another concern is that this stream flows into the Maykha (N'Mai Kha) River, which then joins the Irrawaddy River. So, communities along the Irrawaddy River may also be affected. In Momauk, the Tar Pein River water has become murky, and aquatic populations have dropped significantly.

Expansion of Mining Sites in Pangwa

The following images show the transformation of mining sites in Pangwa, Chipwi Township, between 2018 and 2025. Mining activities expanded significantly following the 2021 coup.



2018



2021



2025

Similarly, water, air, and soil are all becoming polluted. Crop yields are also decreasing, with their quality compromised. Residents in Chipwi and Momauk are severely affected by these effects. Another issue is health risks. Workers at rare earth mines lack proper protective equipment for their working conditions, and as a consequence, some suffer from respiratory issues and lung diseases. As rivers and streams become polluted, people relying on them are also at risk. In some cases, using this water has led to skin diseases. For example, after the Nam Phat Stream near Mai Ja Yang became polluted, villagers in Nhkawng Pa who relied on it began suffering from skin problems. Due to the ongoing conflict, we haven't been able to conduct a thorough investigation yet. If a full investigation were possible, the impacts would likely be even worse and more plentiful than we currently know.

The second point is the socio-economic hardships people are facing. As water and land resources are damaged, farmers struggle more than ever. People living in mining areas have traditionally relied on farming for generations. They also used to export their crops to China. But now, China no longer buys the local products, causing serious hardship. Their buffalo and cattle drink from polluted streams, leading to illness and even death. Some residents have had to abandon their traditional livelihoods, relocating

in search of new places to live. Those who remain often end up working at the mining sites to earn a living. But this does not appear to be a sustainable long-term solution.

Another issue is human rights violations committed by mining companies and authorities. These violations disturb social harmony and worsen existing conflicts. In Chipwi and Momauk townships, there are reports of drug abuse and sexual violence. We've heard that some mining sites permit drug use or even provide drugs to exploit workers' labor. At some sites, women seeking work face sexual exploitation. There are cases where women are hired only if they agree to sleep together with supervisors—a practice known locally as “bed-fellow women.” Because of the absence of clear policies and legal regulations in mining sites, locals are often exploited through inadequate land compensation and unpaid wages. When it comes to land compensation, there are no transparent or fair standards. This leads to frequent disputes between companies and local communities. The lands involved are often ancestral or communal farmland. As a result, land sales cause divisions within families and create more conflict among villagers.

On the other hand, there are also reports of threats and restrictions in these areas. Community groups

- ▶ raising awareness about rare earth mining face obstruction. Researchers and the media are blocked from accessing information. These actions are carried out not only by the New Democratic Army – Kachin (NDAK), Border Guard Force under Zahkung Ting Ying, but also by the KIA, which now controls the area. Those who resist these restrictions or continue to rally and speak out often face threats or even arrest. To be honest, the local communities are not demanding a complete stop to rare earth mining. What they are asking for is a more systematic and less harmful resource governance. Nan Lwin will now continue with more of our research findings on this issue.



Nan Lwin

Program Head
China Studies
Lead Panelist

Regarding rare earth mining sites, both the locals and community groups we interviewed recognize that calling for a complete halt to mining would be difficult. However, they emphasized three key demands to improve the management and governance of these sites. The first point is transparency from organizations and authorities

involved. They want to be clear about how mining licenses are granted, how profits are used, and who benefits from the operations. They're also unhappy with the restrictions placed on community-based groups. More importantly, they want to see meaningful collaboration between authorities and local communities. Instead of local authorities intimidating or bullying, they want responsible organizations to operate transparently, listen to local voices, and work together with the communities.

The second point concerns how revenue from rare earth mining is used. Locals want that income to benefit the region, especially healthcare, education, and basic infrastructure. Rare earth mining has been ongoing for over a decade, but has brought no real benefits to the area. Instead, local communities continue to bear the brunt of the burden. Looking at the data from the past six years, the revenue from rare earth exports was over a hundred times higher than the foreign direct investment flowing into the mining sector during the same period. It's still unclear which organizations are allocating, extracting, or profiting from this revenue. But what's clear is this: the burden of their exploitation falls squarely on the shoulders of the local communities. That's why including local communities in any fair resource distribution system is critical.

The third point is minimizing social and environmental harm. This is key to reducing the long-term negative impacts. Locals want to stop unregulated mining immediately and adopt a more responsible, accountable extraction model. In the long term, they want solutions for environmental damage. They call for advanced technologies to reduce harm and for mineral sales to be fair and public-beneficial. The locals also hope for a proper assessment of the current health and social impacts, along with real efforts to address them. To sum up, authorities granting permits for rare earth mining and the Chinese companies operating them play a key role. If the issues we've discussed go unaddressed, conflicts between locals, authorities, or companies will continue in a vicious cycle.

As we mentioned, rare earths are strategic minerals for China, important for geopolitics and global market dominance. So Myanmar's rare earths will remain crucial to China's strategic supply chain. But whether these sites benefit the public and reduce conflict depends on how the Chinese government handles its companies. For example, when the Mandalay-Sagaing earthquake struck, China was among the first to respond, sending a large amount of financial aid, sophisticated experts, and technical assistance. At that time, public opinion of China in Myanmar was quite positive, as seen clearly on

social media. China has advanced technologies, high standards, strong legal framework, and guidelines. Just like the earthquake aid, if it applies the same responsible practices for the public interest in its investments, such as infrastructure development and rare earth mining, it could make a significant difference. If China adopts its good practices and systems in Myanmar, ensuring local benefits and accountability, this could play a key role in shifting public perception in a more positive direction. With that, I conclude my discussion.



Su Lin Han

Program Assistant
Communications Department
Host

Thank you for the insightful discussion, our panelists. That concludes the first part of our session. Now, we'll move on to the Q&A session. I'll start with one of the pre-submitted questions from the Gabyin community.

Has the KIA seized all the rare earth mining sites in Kachin State? Is the KIA continuing to operate these mining sites, or have they been halted?

Chipwi and Momauk. Just last March, the KIA reportedly told miners they could resume exports to China—with a tax of about 35,000 yuan per ton. So, I'd like to say that we may see a rise in rare earth exports in the coming months.



Kaung San

Program Associate
China Studies
Co-panelist

After the KIA seized Pangwa in October 2024, China closed its border gates, which halted rare earth mining and exports. Although the border gates were reopened later, rare earth exports did not resume. But locals say some mining has continued in parts of

It's understood that as part of China's response to the U.S. increasing import tariffs, there's mention of halting rare earth exports. Rare earths are also critical for the United States. So, could the U.S. start eyeing Myanmar's rare earth minerals?



Su Lin Han

Program Assistant
Communications Department
Host

Thank you, Kaung San, for the answer. I now see a question in the chat box which says:



Nan Lwin

Program Head
China Studies
Lead Panelist

As discussed earlier, rare earths from Kachin are heavy rare earths and highly valuable. Around half of China's heavy rare earths come from Myanmar, indirectly contributing to the global supply chain. It also intertwines with tech and defense

production in the United States. That's why in the U.S.-China trade war, China is playing the strategic "halt on rare earths" card as a countermeasure. American companies are now looking for markets not dominated by China. But it's hard for the U.S. to eye Myanmar's rare earth. Armed groups control the mining areas, where there's an ongoing conflict, a growing war economy, human rights violations without transparency, and a high economic sanctions risks, making it difficult for U.S. companies to deal directly or ethically with them. Exports and production can be disrupted at any time by conflicts, making the reliance on Myanmar's rare earth a strategic weakness. With that, I'd like to say it's really difficult for the U.S. to eye on them.



Su Lin Han

Program Assistant
Communications Department
Host

Thank you for your comment,
Nan Lwin. Allow me to read another
question submitted in the chat box.

Rare earth mining causes environmental damage, but it's a valuable resource with a large market, which could generate significant income for Kachin State. What's stopping the KIO or KIA from creating a clear policy on it? Why haven't they been able to use this resource effectively for development?



Kaung San

Program Associate
China Studies
Co-panelist

First, thank you for bringing the question up. Rare earths have a huge market, not only in China but globally. The revenue potential is substantial; there could be great advantages if managed properly. The KIA has made efforts to introduce policies for

systematic mining. But in my opinion, there are obstacles to it. The first is territorial control and condition.

The KIA used to control Momauk and now also Pangwa. They have a lot of rare earth sites on their hands right now. So, they need to adapt their policies to the shifting situation.

The second challenge is the technical and financial capacity required for rare earth mining. These issues are making it difficult for the KIA to manage. Rare earth mining requires a lot of expertise and investment. So, in my view, the two main issues are technical limitations and policy adjustments. That's why it's still difficult for them right now to create a clear policy.



Su Lin Han

Program Assistant
Communications Department
Host

Thank you, Kaung San, for answering the question. We'd like to re-invite our Gabyin members attending today for questions and comments.

A participant named Zung Ting has raised the hand. You may now ask or share your thoughts.

Regarding the NUG, what kind of collaboration or support can they offer for the KIA's rare earth production and management? What kind of assistance or joint efforts are possible? Specifically, what support can they provide?



Nan Lwin

Program Head
China Studies
Lead Panelist

First of all, we need to consider the territorial situation. The rare earth deposits are in Kachin State. Regarding the conflicts, the PDFs are actively involved in providing support. But from a technical standpoint, collaboration with the NUG is possible.

Rare earths could become a source of revenue for the resistance forces. So, I believe technical cooperation can be pursued.



Su Lin Han

Program Assistant
Communications Department
Host

Special thanks to Nan Lwin for the insight. Due to the time constraints, we'll conclude the Q&A session here. I'd like Nan Lwin to share a few words for the closing remarks on today's discussions.



Nan Lwin

Program Head
China Studies
Lead Panelist

To sum up, there are three main points. First, Myanmar's rare earths are vital to China and the global market, and locals are aware of this, yet they're facing immense struggles. Second, they're not asking to stop mining completely, but to ensure it's fair and regulated, whether bilaterally or trilaterally. Residents want to avoid unregulated, discriminatory mining that causes a resource curse and harms communities. They're calling on authorities to enforce strong oversight. Lastly, just as China provided aid after the Mandalay-Sagaing earthquake, similar support now could lead to a more equitable arrangement that benefits both. With that, I'd like to conclude.



Su Lin Han

Program Assistant
Communications Department
Host

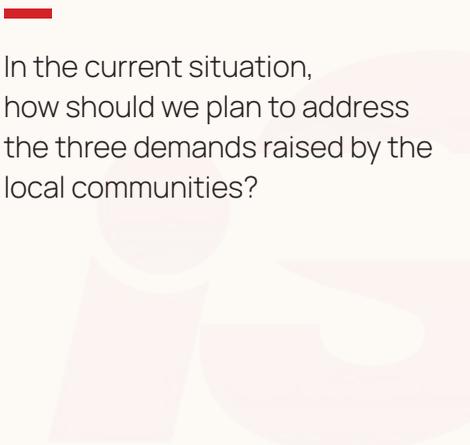
Thank you, Nan Lwin, for the closing remarks. You can access more research on our website, www.ispmyanmar.com and social media platforms. We truly appreciate each and every Gabyin member for joining today's discussion. By saying our appreciation, we will conclude the program for today.

Appendix Questions

The question listed below was submitted via chat during the
30 Minutes with the ISP event on April 26, 2024.

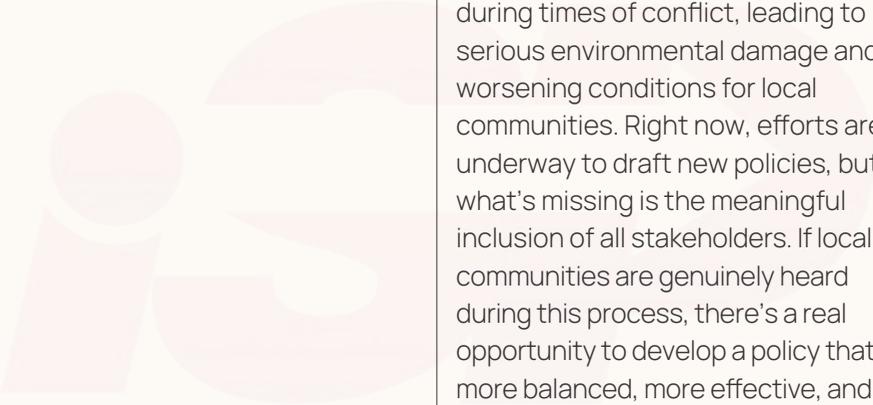
Are rare earth minerals only found in Kachin State? Are they also found in other parts of Myanmar? If they are, what would happen if China came to mine them?

At present, commercially viable rare earth deposits have only been confirmed in Kachin State. Whether similar deposits exist elsewhere in Myanmar remains uncertain. Some studies point to potential reserves in eastern Shan State, the Mandalay Region, the Sagaing Region, and parts of Tanintharyi Region, such as Dawei. However, determining the size and commercial viability of these deposits will require further exploration and research. If rare earths are indeed found in other regions, it's likely that China, following its pattern in Kachin, would seek to expand its mining operations. Given the rising global demand, other countries might also pursue involvement. To prepare for this possibility, Myanmar must establish clear policies, legal frameworks, and regulatory mechanisms specific to rare earth mining, and—crucially—ensure they are effectively enforced. With such safeguards in place, the environmental damage and social disruptions often associated with mining can be mitigated, no matter which external actors are involved.



In the current situation, how should we plan to address the three demands raised by the local communities?

Given current circumstances, fully meeting all three demands from local communities will be difficult and will take time. Rather than rushing implementation, meaningful progress depends, as noted earlier, on the active involvement of local authorities, armed groups, and Chinese companies, all of which play pivotal roles. Local authorities, reliant on public support, must recognize that these issues require careful, phased responses. From what I understand, the Kachin Independence Organization (KIO) is also working to develop clearer governance on rare earth mining. In this process, it is essential to listen sincerely to grassroots voices. For its part, the Chinese government should take a more systematic approach to regulating resource extraction to avoid undermining China–Myanmar relations, especially public perceptions of China among the Myanmar population. Positive steps might include providing technical support, promoting international best practices, and ensuring that operations are structured to share benefits with local communities, minimize environmental and social harm, and include robust compensation mechanisms where damage does occur.

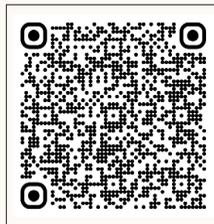


Previous quasi-civilian governments in Myanmar weren't able to address the rare earth issue effectively. A big part of the challenge was the complex involvement of various armed groups and their competing interests. While the topic was discussed in parliament, actual solutions were hard to implement because of the ongoing conflict and the influence those groups hold on the ground. Over the years, unregulated rare earth mining has continued, often expanding during times of conflict, leading to serious environmental damage and worsening conditions for local communities. Right now, efforts are underway to draft new policies, but what's missing is the meaningful inclusion of all stakeholders. If local communities are genuinely heard during this process, there's a real opportunity to develop a policy that's more balanced, more effective, and more sustainable in the long run.

Despite the existence of environmental ministries in both the SAC and NUG governments, as well as in EROs like the KIA, what specific actions are these entities taking to address the current consequences of rare earth mining? Are they completely unable to do anything about it?

Besides the KIO, which other domestic entities or companies are involved in rare earth mining operations?

Before the KIA took control of the Pangwa region, rare earth mining in areas like Chipwi and Pangwa was mostly tied to companies linked to the Kachin Democratic Army, or NDA-K—a border guard force under the SAC. One of the key players was the Myanmar Myo Ko Ko Company, led by NDA-K leader Zahkung Ting Ying, which operated across most of the rare earth mining sites. In addition to that, some local militias and a few “Wa”-affiliated companies were also reportedly involved in these operations. ■



Curious about Myanmar's rare earth?
Explore our latest report:
Unearthing the Cost – Rare Earth Mining in Myanmar's War-Torn Regions.





ISP Policy Brief

Saving the Consensus

The Future of Multilateral Action on Myanmar

ISP-Myanmar introduced new formats for presenting its research in 2025, including the launch of Policy Briefs. One such brief was published four days before the ASEAN Summit in October 2025. Focusing on the ASEAN Five-Point Consensus (5PC) on Myanmar, it set out the core policy problem, background context, the differing approaches of successive ASEAN chairs and the range of available options.

ISP-Myanmar argued that, in the absence of a viable alternative framework, the Consensus should continue to be upheld and used as a basis for engagement.





ISP Policy Brief Series 2025

PB2025-01 | October 23, 2025

SAVING THE CONSENSUS: THE FUTURE OF MULTILATERAL ACTION ON MYANMAR

The erosion of the Five-Point Consensus (5PC) would open the door to a “might makes right” approach in Myanmar and across the region. Unless an alternative international consensus can be forged, Myanmar’s resistance stakeholders must continue to anchor their diplomacy to the 5PC, while ASEAN should combine its procedural diplomatic engagement with a more transactional, high-level political initiative.



SAVING THE CONSENSUS: THE FUTURE OF MULTILATERAL ACTION ON MYANMAR

■ Policy Problem

As Malaysia prepares to hand over the ASEAN chairmanship to the Philippines at the October 26, 2025, summit, the Myanmar crisis remains unresolved. More troublingly, the ASEAN Five-Point Consensus (5PC)—the only multilateral consensus framework still nominally accepted by all sides, from the United Nations (UN) and Western governments to China—is losing relevance. Without a credible alternative, its weakening could spell the collapse of an international policy framework on Myanmar. In that vacuum, individual states are likely to pursue their own path, engaging separately with both the State Security and Peace Commission (SSPC) and resistance forces according to their national interests. Western governments such as the United States and multilateral bodies, such as the UN, the European Union (EU), may continue to apply pressure or impose sanctions. Yet without regional alignment, the effectiveness of any collective response will erode. The consensus that once gave ASEAN diplomatic leverage over Myanmar’s crisis is now at risk of splintering entirely.

■ Context and Background

It must be recognized that during Malaysia's chairmanship, Kuala Lumpur—led by Prime Minister Anwar Ibrahim and the ASEAN Special Envoy on Myanmar—made unusually bold attempts to address the Myanmar crisis in its effort to distinguish itself from previous ASEAN chairs. For the first time, resistance forces received near-equal recognition to the State Administration Council (SAC)/State Security and Peace Commission (SSPC). In April 2025, while in Thailand, Prime Minister Anwar engaged both parties, meeting SAC Chairman Senior General Min Aung Hlaing in person and NUG Prime Minister Mahn Winn Khaing Thann virtually. Following the Mandalay-Sagaing earthquake, ASEAN humanitarian aid was delivered directly to affected communities inside Myanmar.

Malaysia's approach sought not only engagement but inclusion. The ASEAN Special Envoy provided key stakeholders with a safe space and resources for dialogue, linking discussion outcomes with ASEAN's policy and integrating them into draft recommendations for submission to the ASEAN Summit. The Stakeholder Engagement Meetings (SEMs)—held in May, August, and October 2025—aimed to develop an “action plan” for dialogue among warring actors. Online consultations were arranged for those unable to attend, and the envoy's delegation visited Thailand in June 2025 for direct engagement.

Yet internal frictions blunted these efforts. Disagreements between the Joint Coordination Body (JCB), which included several key resistance groups, and the Special Envoy's office over invitation formats and differing views on a few other matters led some ethnic armed organizations to withhold senior-level participation. This weakened the SEMs' inclusiveness and momentum. Malaysia's foreign minister emphasized that



The ASEAN Troika should be expanded to include non-ASEAN neighbors, fostering cooperation among countries with shared objectives to pursue innovative strategies aligned with the 5PC.

“an election is not a priority for now, the priority is to cease all violence...”. Yet, ASEAN's diplomatic weight proved insufficient to halt the junta's escalating military offensives and its push to stage elections under its own roadmap. Despite Malaysia's sincerity and relentless efforts, ASEAN's convening power experienced tangible restraint, and progress remained limited.

■ Policy Options

ASEAN and Myanmar's key stakeholders now face a defining choice: revive the ASEAN Five-Point Consensus (5PC) by turning it into a workable plan backed by resources and political will, or let it quietly expire—leaving each state to pursue its own course. The latter would mean fragmented diplomacy, with governments engaging with the SSPC, the post-election administration, and resistance forces independently, according to their national interests. Time is running out.

● ASEAN Chairs' Engagement on the Myanmar Crisis (2021–2025)

ISP-DM2025-186

Chair Country	Special Envoy	Engagement Approach
Brunei (2021)	Erywan Yusof Minister of Foreign Affairs	During its ASEAN alternate chairmanship, Brunei established the ASEAN Five-Point Consensus (5PC) as a fundamental principle. Appointed a Special Envoy on Myanmar and banned Myanmar's junta leader and other political appointees from attending ASEAN summits when Myanmar failed to implement the consensus. Did not meet with the National Unity Government (NUG) or Ethnic Armed Organizations (EAOs), but the special envoy was able to visit Myanmar.
Cambodia (2022)	Prak Sokhonn Deputy Prime Minister and Minister	Increased direct engagement with the regime, including efforts to bring back Myanmar leaders to ASEAN meetings. Prime Minister Hun Sen made an early visit to Myanmar, attempting to persuade the junta leader, a move widely criticized for conferring legitimacy on the junta. This approach triggered disagreements within ASEAN and ultimately undermined efforts to implement the 5PC. Track 1.5 meetings happened with Thailand's initiative.
Indonesia (2023)	Retno Marsudi* Minister for Foreign Affairs	Adopted an approach of active and "quiet diplomacy," establishing the Office of the ASEAN Special Envoy to coordinate engagement. Held over 100 meetings with resistance actors, including the NUG and EAOs. Initiated the ASEAN Troika mechanism and rejected the junta's election plan. This inclusive and consultative approach, involving all key stakeholders, marked a departure from ASEAN's traditional methods. Track 1.5 meetings occurred with Thailand and India's initiatives.
Laos (2024)	Alounkeo Kittikhoun Deputy Minister of Foreign Affairs	Prioritized low-profile "quiet diplomacy" and stability, continuing the ASEAN Troika mechanism and sustaining ASEAN's engagement on the Myanmar issue. However, the decision to allow Myanmar representatives to rejoin certain ASEAN meetings drew criticism, and it was perceived as undermining ASEAN's unity. Overall, this approach achieved less progress compared to Indonesia's tenure. Apart from Laos, there were Track 1.5 meetings led by Thailand.
Malaysia (2025)	Tan Sri Othman Hashim Former Secretary General of Malaysia's Foreign Ministry	Demonstrated active leadership through an inclusive engagement strategy, holding dialogues with both the regime and the NUG. Managed to maintain balanced relations with all resistance forces, including EAOs. Held Stakeholder Engagement Meetings (SEMs) with the aim of enabling Myanmar's key stakeholders to develop an actionable plan. Rejected the junta's election plan. Faced calls for a stronger policy beyond the 5PC.

* During Indonesia's 2023 ASEAN chairmanship, Retno Marsudi initiated the establishment of the Office of the ASEAN Special Envoy on Myanmar.

While the crisis burns on, ASEAN capitals are preoccupied with other pressures—from trade frictions with Washington to rising tensions in the South China Sea. In recent years, the 5PC has already been weakened amid neighboring states like China and others' pragmatic approaches, driven by security, economic, and geopolitical priorities. As the Philippines prepares to assume the ASEAN chairmanship amid escalating maritime disputes with Beijing, the Myanmar issue risks being further sidelined, deepening the divide between mainland and maritime ASEAN members. U.S. President Trump is slated to attend the October 26 ASEAN Summit. Were he to work with ASEAN within the bloc's framework—leveraging American influence through a careful mix of pressure, persuasion, and step-by-step progress—it would be an encouraging sign. Yet such an outcome appears unlikely; another round of megaphone diplomacy of routine condemnation seems far more probable.

■ Policy Recommendations for ASEAN and Myanmar Key Stakeholders

If ASEAN hopes to rescue the Five-Point Consensus from irrelevance, it must combine its usual procedural diplomatic intervention with a more transactional, top-level political intervention. ASEAN leaders—ideally a core group of at least three foreign ministers—should coordinate closely with Myanmar's key neighbors, notably China, India, and Thailand, to discuss practical implementation of the 5PC in parallel with the junta's electoral roadmap. To make such an intervention meaningful, traditional procedural diplomatic intervention also needs to set benchmarks for each step towards the ultimate goal. In particular, ASEAN needs structure and continuity: the Office of the ASEAN Special Envoy should operate on a fixed multi-year mandate, rather than shifting annually with the rotating chairmanship. The ASEAN Troika

should be expanded to include non-ASEAN neighbors, fostering cooperation among countries with shared objectives to pursue innovative strategies aligned with the 5PC. This would sustain institutional memory and strategic coherence. As the 5PC remains the only internationally recognized framework on Myanmar, its erosion would not only diminish ASEAN's centrality but also embolden major powers—particularly China—to disregard multilateral norms, setting a troubling precedent for regional diplomacy. It could also undermine ASEAN's interests and weaken the international roadmap for resolving the Myanmar crisis.

For Myanmar's resistance forces, the lesson is equally stark. Unless they can forge an alternative international consensus, they must continue to anchor their diplomacy to the 5PC. The failed "tripartite dialogue" of the 1990s should serve as a cautionary tale. Since the 1994 UN General Assembly resolution, repeated calls for dialogue among the Tatmadaw, democratic forces led by the National League for Democracy (NLD), and ethnic groups were undermined when the NLD pursued elections in 2012. The NLD's unilateral decision to run for the election was not based on any covenant that arose from such tripartite dialogue or step-by-step political gains based on the shared political framework, but rather based on personalistic popularity. Without securing a genuine tripartite agreement, it effectively undermined the very framework that had guided international engagement for decades. Today, if resistance movements neglect the 5PC—whether out of frustration or indifference—they risk pushing Myanmar to the margins of international diplomacy. Endorsing and strategically reinforcing the ASEAN framework, despite its flaws, remains the only viable way to keep Myanmar's crisis on the global agenda and prevent its descent into diplomatic irrelevance. ●

ISP Situation Brief**Education Access in Crisis
Nearly 7 Million Children Out of School**

ISP-Myanmar conducted research on socioeconomic conditions after the 2021 coup and published a Situation Brief on the loss of access to basic education. Using data from the 2019 Interim Census and reports by the UN Population Fund (UNFPA), the study found that 53 percent of school-age children are now out of school. ISP-Myanmar assessed that this sharp decline in enrolment is driven primarily by post-coup economic hardship and worsening insecurity.





ISP Situation Brief Series 2025
Socioeconomic Studies
SB2025-02 | August 7, 2025

EDUCATION ACCESS IN CRISIS: NEARLY 7 MILLION CHILDREN OUT OF SCHOOL

Over half of Myanmar's school-age children,
about 53 percent, are missing out on basic education.



Education Access in Crisis: Nearly 7 Million Children Out of School

Since the 2021 coup, access to basic education has shrivelled, with school-enrollment rates steadily falling. In the pre-coup academic year (2019–20), more than 9.7 million students were enrolled in basic education. By 2025–26, that figure had dropped to just 6.1 million. After the 2018–19 academic year, Myanmar's schools should have enrolled at least 10 million students annually—based on population growth—from primary through secondary levels. However, that target has not been met for the past five academic years, and numbers have decreased further this year. According to the 2019 interim census and figures from the United Nations Population Fund (UNFPA), the number of school-age children could be around 13 million. Based on that, roughly 7 million school-age children in 2025–26 are missing out on basic education¹. Based on the gross enrollment ratio, over half of Myanmar's school-age children, about 53 percent, are missing out on basic education. On the other hand, the pathway to higher education is also narrowing: in 2020, more than 900,000 students sat the matriculation exam; by 2025, only about 200,000 did.

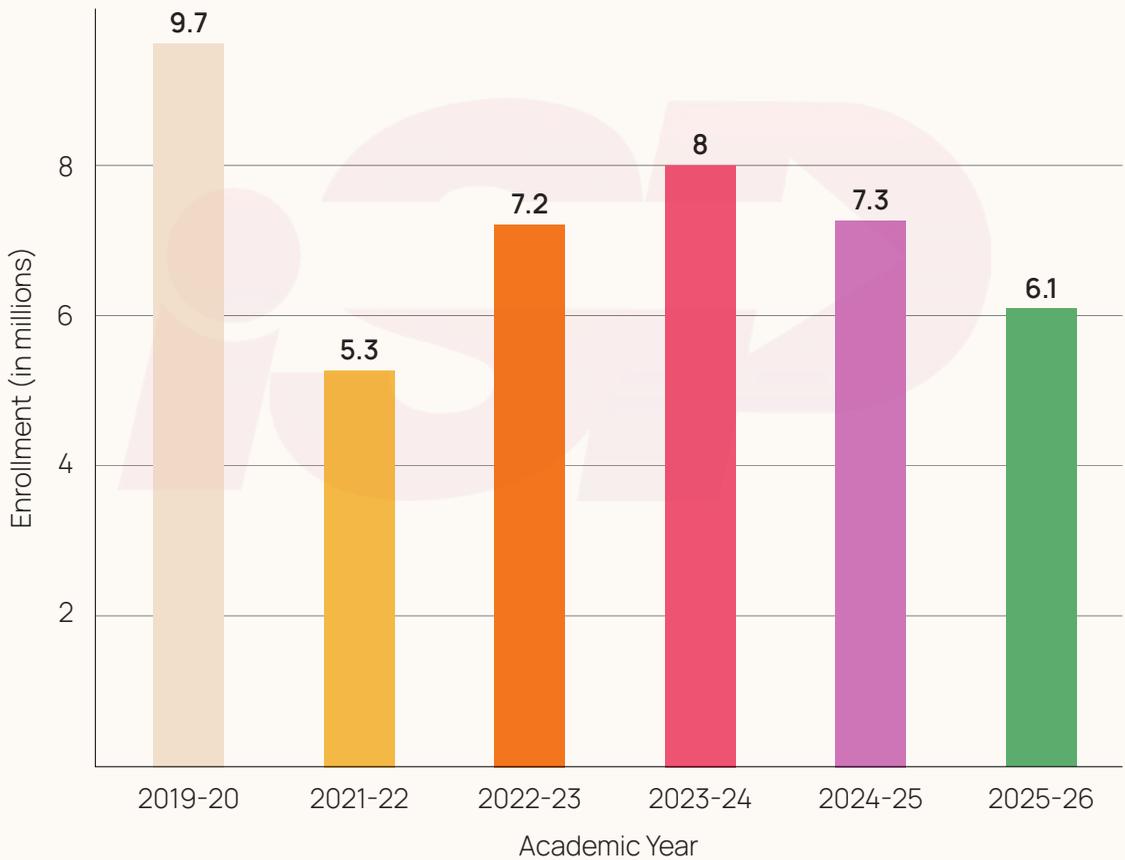
The figures underscore that access to basic education has been a steep obstacle for children in Myanmar. Economic instability, widening gaps between household income and expenses, and the insecurity caused by armed conflict are lowering enrollment rates. In conflict-hit areas, the situation is even dire: most schools remain closed, and some are built alongside bomb shelters to shield students from the State Security and Peace Commission's (SSPC) airstrikes. ■

Data as of July, 2025. (1) The number of school-age population is based on the 2019 interim census, as the 2024 census provides only preliminary data without age-specific breakdowns. Consequently, the number of school-age children in 2025 may be underestimated. This Situation Brief No. 2 (English Version) was published on August 7, 2025, as a translation of the original Burmese version published on August 6, 2025.

Only 47 Percent of School-Age Children Enrolled in Class

ISP Data Matters Number 165

Since the 2018–19 academic year, average school enrollment in Myanmar should have exceeded 10 million annually, based on population trends. Yet in each of the past six years, it has fallen short. By 2025–26, enrollment had dropped to just 6.1 million, amounting to only 47 percent of school-age children, according to the gross enrollment ratio.



Data as of July 2025 is calculated using Gross Enrollment Ratio and based on the 2019 interim census, as the 2024 census provides only preliminary data without age-specific breakdowns.



Survey Report

Myanmar's Key Stakeholders and their Perceptions of Sino-Myanmar Relations – A Survey (2024)

ISP-Myanmar has conducted its survey Myanmar's Key Stakeholders and their Perceptions of Sino-Myanmar Relations since 2022, with the 2024 edition marking the third round. The survey comprises 92 questions across eight sectors, covering issues such as China's role in Myanmar's crisis, the peace process and economic-corridor projects. A key addition in the latest round was a set of questions on how stakeholders view China's stance and policies on conflict resolution in Myanmar. The findings attracted strong interest among Gabyin members and generated a high level of engagement with ISP-Myanmar's email engagement.





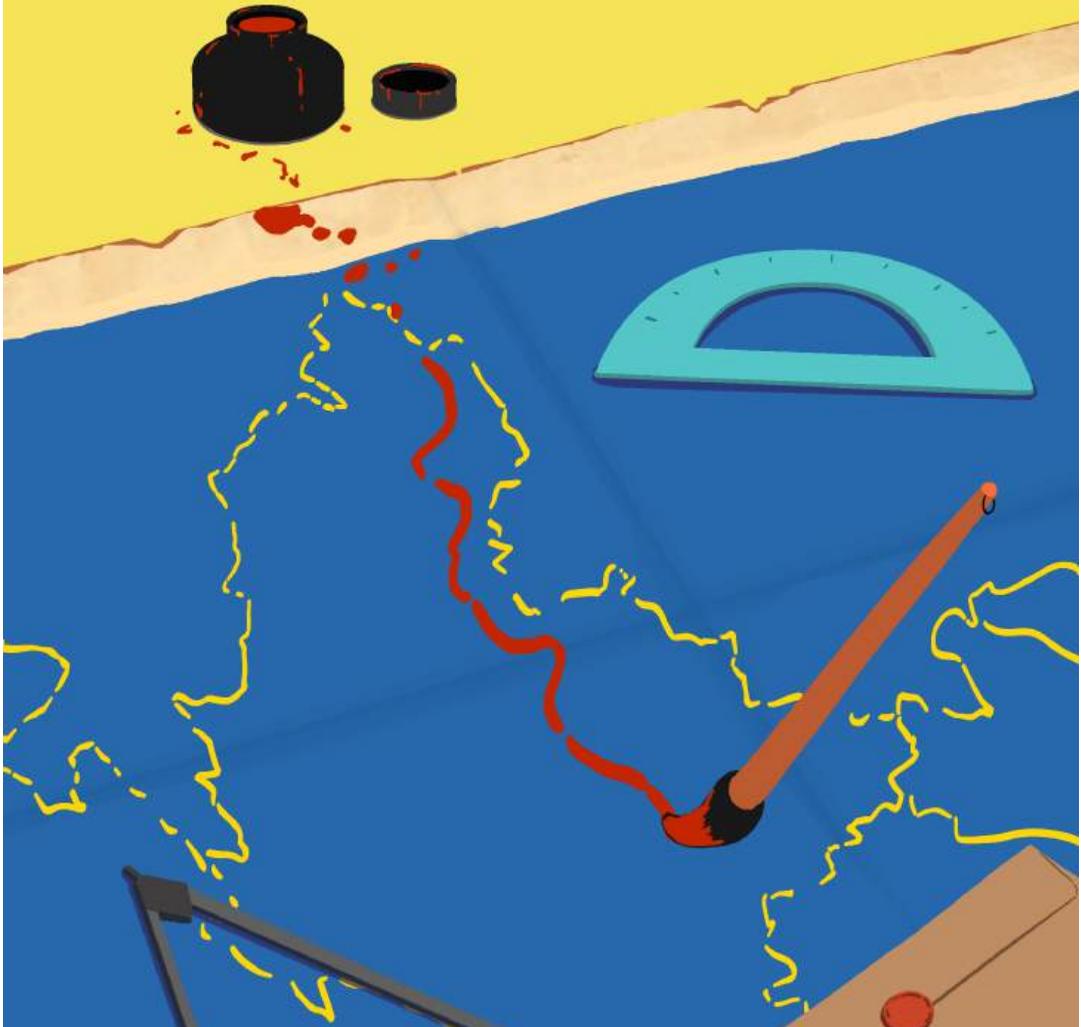
ISP CHINA STUDIES

August, 2025

Myanmar's Key Stakeholders and their Perceptions of

SINO-MYANMAR RELATIONS A SURVEY

2024



ABOUT THE SURVEY



Since 2022, the Institute of Strategy and Policy-Myanmar (ISP-Myanmar) has been conducting an annual survey titled “Myanmar’s Key Stakeholders and Their Perceptions of Sino-Myanmar Relations.” The 2024 survey, which marks the third iteration, aims to analyze how key figures within Myanmar’s policy community from various sectors perceive the fundamental factors shaping Sino-Myanmar relations. Through the survey findings, ISP-Myanmar explores gaps between perceptions of different groups and connections within these dynamics. This year’s survey includes 92 questions, divided into eight sections: (1) general perceptions of China, (2) perceptions of the role of China in Myanmar’s political crisis, (3) perceptions of the role of China in Myanmar’s peace processes, (4) perceptions of Sino-Myanmar economic relations, (5) perceptions of China-Myanmar Economic Corridor (CMEC) projects, (6) perceptions of China’s regional integration plans through Myanmar, (7) perceptions of China’s soft power, and (8) perceptions of the use of Chinese technology.

Survey respondents consisted of six key stakeholder groups:

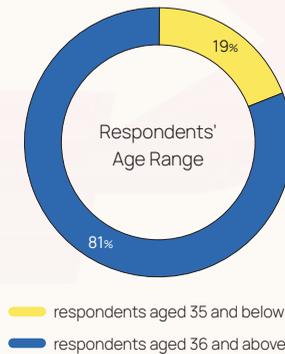
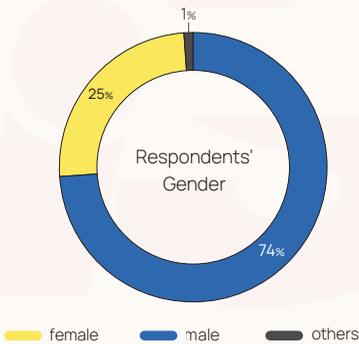
- (1) the political community
- (2) the business community
- (3) civil society organizations (CSOs)
- (4) prominent individuals, including scholars, activists and pundits who are



■ Respondents and Percentage of Stakeholders Surveyed from Six Key Communities

Community	Respondents	Percentage
Civil Society Organizations (CSOs)	105	40%
Political Society	16	6%
Business Community	42	16%
Prominent Individuals	66	25%
Ethnic Armed Organizations (EAOs)	15	6%
People's Defense Forces (PDFs) and Local Defense Forces (LDFs)	16	6%

Total 260 100%*



► knowledgeable about China's political, economic, and international affairs
 (5) leaders and members of ethnic armed organizations (EAOs)
 (6) leaders and members of the People's Defense Forces (PDFs) and Local Defense Forces (LDFs), which emerged during the Spring Revolution and operate in areas where Chinese investments are located.

A distinctive feature of this survey is the inclusion of questions exploring Myanmar key stakeholders' perceptions on China's stance, positions, and policies regarding conflict resolution in Myanmar. The survey aimed to reach 300 individuals across six stakeholder groups and successfully collected responses from 260 participants, including 193 male, 64 female, and three individuals who identified as other

* Percentages may not total 100% due to rounding.

► genders. This represents an increase of 10 respondents compared to the 2023 survey and 45 more than the 2022 survey, with female participation also rising steadily each year. To ensure clarity and ease of interpretation, the numerical data in this survey have been rounded to the nearest whole number. As a result, percentages may not total 100 percent. This does not affect the overall reliability, validity, or accuracy of the survey results. The survey received technical support from the People's Alliance for Credible Elections (PACE). Detailed methodologies and topics covered can be explored in the appendices.

To make sense of the survey responses from Myanmar's six policy communities, it is essential to consider the broader political and conflict dynamics context during the data collection period. The Three Brotherhood Alliance (3BHA) resumed the second phase of Operation 1027 a few months before the survey commenced. Prior to this, the 3BHA had already overrun 240 military outposts and key border trade stations held by the State Administration Council (SAC), dealing a significant blow to the regime. In response, Beijing brokered ceasefire talks between the SAC and 3BHA in Kunming, Yunnan Province—dubbed the “Haigeng Talks” after the hotel where the talks took place. These talks reflected China's strategy of “conflict de-escalation through economic incentives.” The

Haigeng Agreement produced a temporary ceasefire in northern Shan State, effective January 11, 2024. In a parallel diplomatic move, Chinese Foreign Minister Wang Yi visited Naypyitaw on August 14, meeting SAC leadership, former Senior General Than Shwe and former President Thein Sein.

The Haigeng Talks period marked a turning point in China's diplomatic strategy toward Myanmar Foreign Minister. Wang Yi also laid out three “bottom lines” for Myanmar: the country must not descend into civil war, sever ties with ASEAN, or fall under the sway of foreign powers. Beijing also reaffirmed support for elections as a political exit for the SAC. Soon after, China exerted pressure on both the SAC and the Myanmar National Democratic Alliance Army (MNDAA) to restore a ceasefire, paving the way for the regime's reoccupation of Lashio, which had previously been controlled by the MNDAA. During the survey period, October 2024, meeting records between Deng Xijun, China's Special Envoy to Myanmar, and the United Wa State Army (UWSA) were also leaked. Later, following the powerful earthquake in Mandalay and Sagaing on March 28, 2025, China provided swift humanitarian assistance. These developments form the backdrop against which Myanmar's policy community has assessed China's role—adding critical nuances to the survey findings. ■

EXECUTIVE SUMMARY



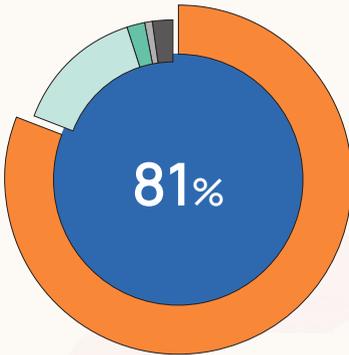
The 2024 survey reveals a significant rise in negative perceptions of China within Myanmar's policy community. Most notably, perceptions of China as "not a good neighbor" have increased significantly. This year's most striking finding is a shift in concern: where economic dominance once topped the list, a majority of respondents now said China's interference in Myanmar's internal armed conflicts and security sector as the greatest challenge in bilateral relations.

Among Ethnic Armed Organizations (EAOs), there is a prevalent belief that China seeks to position Myanmar as a client state. Pessimism has also grown regarding China's involvement in Myanmar's peace process and its outcomes. Many respondents view China's policies on resolving Myanmar's crisis regarding the Three Bottom Lines as impractical, with a rising number believing that China is actively interfering in Myanmar's affairs and prefers an authoritarian governance system for the country.

Additionally, there is widespread disapproval of the implementation of China-Myanmar Economic Corridor (CMEC) projects. Findings indicated that Chinese companies have reached out to EAOs to ensure the continued operation of these projects. At the same time, China has also contacted People's Defense Forces and Local Defense Forces (PDFs/LDFs) in attempts to safeguard China-backed ventures. Regarding regional integration initiatives, awareness remains low—most respondents are unfamiliar with these projects, except for the Lancang-Mekong Cooperation (LMC). Additionally, China's economic development model, 'Democracy with Chinese Characteristics', governance model, and related systems are increasingly disfavored. ■

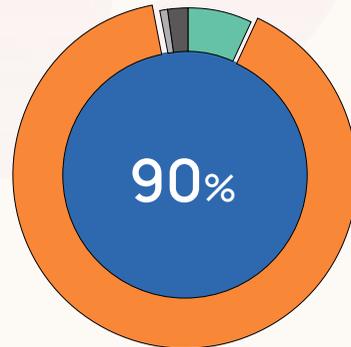
KEY FINDINGS

1. Elections considered unlikely to resolve Myanmar's conflict in the long run



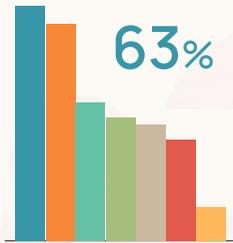
A strong majority of respondents—81 percent—viewed the State Administration Council's (SAC) proposed elections, as encouraged by China as a path toward political settlement, as unlikely to help resolve Myanmar's conflicts in the long run. This reflects an eight percentage point rise from last year, when 73 percent held a similar perspective. Only 16 percent believe the election could pave a constructive path.

2. Democracy with Chinese characteristics widely unfavored for Myanmar



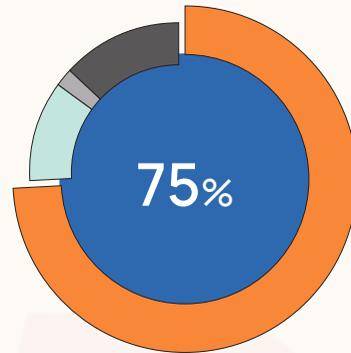
When asked whether a model of democracy with Chinese characteristics was suitable for Myanmar, 90 percent of respondents said it was not, while seven percent supported the idea. The group disfavoring the Chinese model has grown by three percentage points since the 2022 and 2023 surveys. Support, meanwhile, has declined—by one point compared to 2022 and two points compared to 2023.

3. China's efforts in Myanmar's crisis seen as protection of its strategic interests



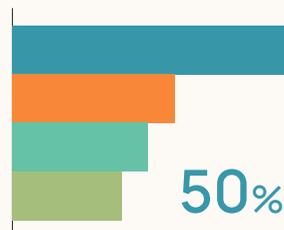
A majority of respondents—63 percent—believed that China's increased involvement in Myanmar's crisis stems primarily from the attacks on, and seizure of, its strategic projects. Military gains by the Three Brotherhood Alliance (3BHA) were also cited by 58 percent of respondents as a key factor. Meanwhile, 37 percent attributed China's growing attention to the rising unity among Myanmar's opposition forces.

4. Negative Views of China Continue to Rise



Three-quarters of respondents said their views of China have become more negative—a trend that has grown steadily year by year.

5. Chinese firms' consultations on project continuations



Half of respondents (50 percent) who were contacted by Chinese companies involved in the China-Myanmar Economic Corridor (CMEC) said the main reason they were contacted was to request cooperation to continue project implementation. Many also reported being warned against disrupting China's initiatives.

Survey Report

Raising the Lantern's Wick High A Survey of Myanmar's Socioeconomic Crisis and Public Resilience

ISP-Myanmar has been researching socioeconomic conditions following the coup. To assess conflict-driven trade route blockages and their impact on the public, a survey was conducted during the last week of September 2025 and was published in November 2025. The survey comprised 18 questions addressing the status of commodity shortages, their impacts, and coping mechanisms, generating significant interest among the Gabyin community members. Based on these findings, the *30 Minutes with the ISP* episode titled *The Spirit is Willing, but the Flesh is Weak: The Socioeconomic Cost of Myanmar's Disrupted Trade Routes* also received high viewership.





RAISING THE LANTERN'S WICK HIGH

A Survey of Myanmar's
Socioeconomic Crisis and Public Resilience

November 2025





Summary of Findings

To assess how conflict-related trade disruptions have affected the public, ISP-Myanmar conducted a nation wide survey in late September 2025. A total of **1,015 respondents** from 85 townships across all 15 regions and states of Myanmar, including the Naypyitaw Council Territory, participated in the study¹.

Survey findings reveal that trade disruptions have caused shortages of daily consumer goods and basic medicines, and prices for these goods have increased by one and a half to twice, or even three or four times, in some areas. The healthcare sector has been hit hard, particularly due to medicine shortages, price surges, and difficult access to healthcare facilities. Livelihoods have also deteriorated, forcing many to switch jobs or struggle with more restricted income. To cope, people have turned inward—cutting back on household budgets, consumption, and relying on support from local charity groups and Civil Society Organizations (CSOs) to get by.

¹ See the Survey Methodology for more detail.

The report finds that the State Security and Peace Commission (SSPC)'s mismanaged economic policies and administration have upended much of the country's economic system. Survey results also suggest that the SSPC's administrative apparatus has limited capacity to provide relief and promote wellbeing of the citizens. Similarly, the ability of Ethnic Armed Organizations (EAOs), local defense forces (PDFs and LPDFs), and the National Unity Government (NUG) to offer meaningful assistance remains severely limited as alternative service providers.

Respondents felt that they do not have enough for their needs compared to last year citing rising prices and poor job prospects. As conditions continue to worsen, the public's foremost demands are for employment and personal security. When asked how they viewed current conditions, just over half of respondents said they "can continue to struggle on," while a significant portion also described the situation as "hopeless." Only a small minority believed conditions "will get better."

These findings are preliminary rather than conclusive, underscoring the need for more comprehensive socioeconomic research. Some of the results were also discussed in the October 18, 2025, episode of *30 Minutes with the ISP*, titled "The Spirit Is Willing, but the Flesh Is Weak." The full discussion, with English subtitles, is available on ISP-Myanmar's website and YouTube channel.

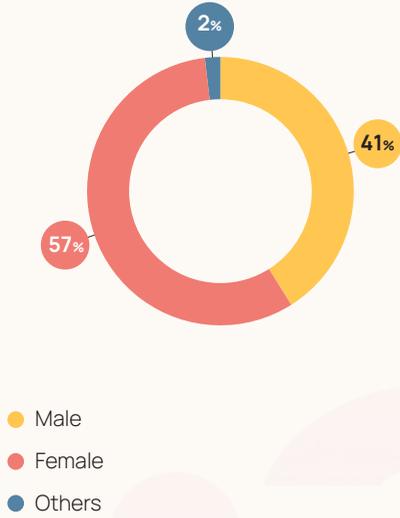


Respondent Demographics

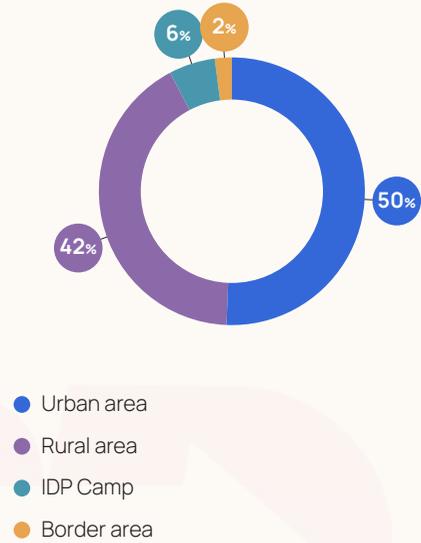
A total of **1,015 respondents** participated in the survey. **57 percent** were female (**579 respondents**), followed by **41 percent** male (**417 respondents**), and **two percent** others (**19 respondents**). The survey covered a mix of locations: urban areas, rural areas, border areas, and IDP (Internally Displaced Person) camps. Participants were 18 years of age and older, with the 26–40 age group the largest, followed by those aged 41–60. In terms of monthly household income, **24 percent** (**242 respondents**) reported earning between 400,000 and 600,000 MMK, **20 percent** (**208 respondents**) between 200,000 and 400,000 MMK, and **18 percent** (**186 respondents**) over 1 million MMK². The survey findings are organized into five sections.

² At the time of Burmese publication on November 11, 2025, the average exchange rate was reported as 1 USD = 4,020 MMK, according to Democratic Voice of Burma (DVB) TV News.

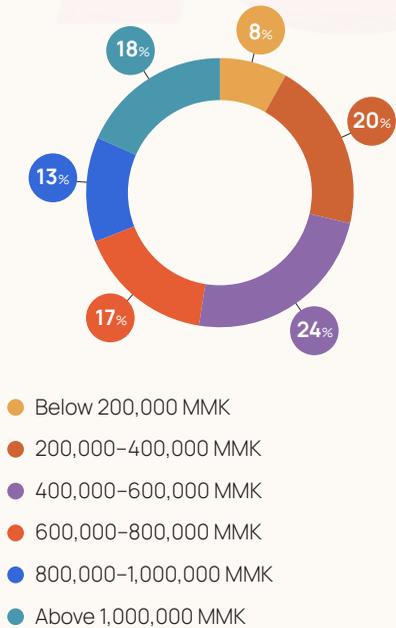
■ Respondents



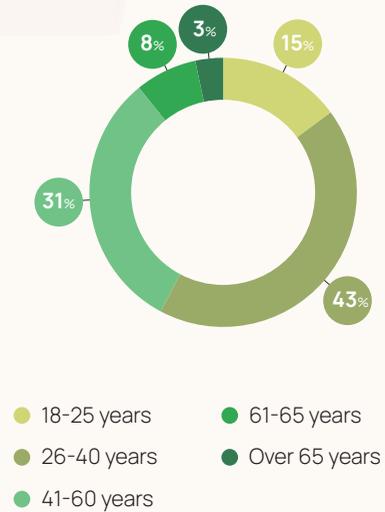
■ Respondents by Location



■ Monthly Household Income

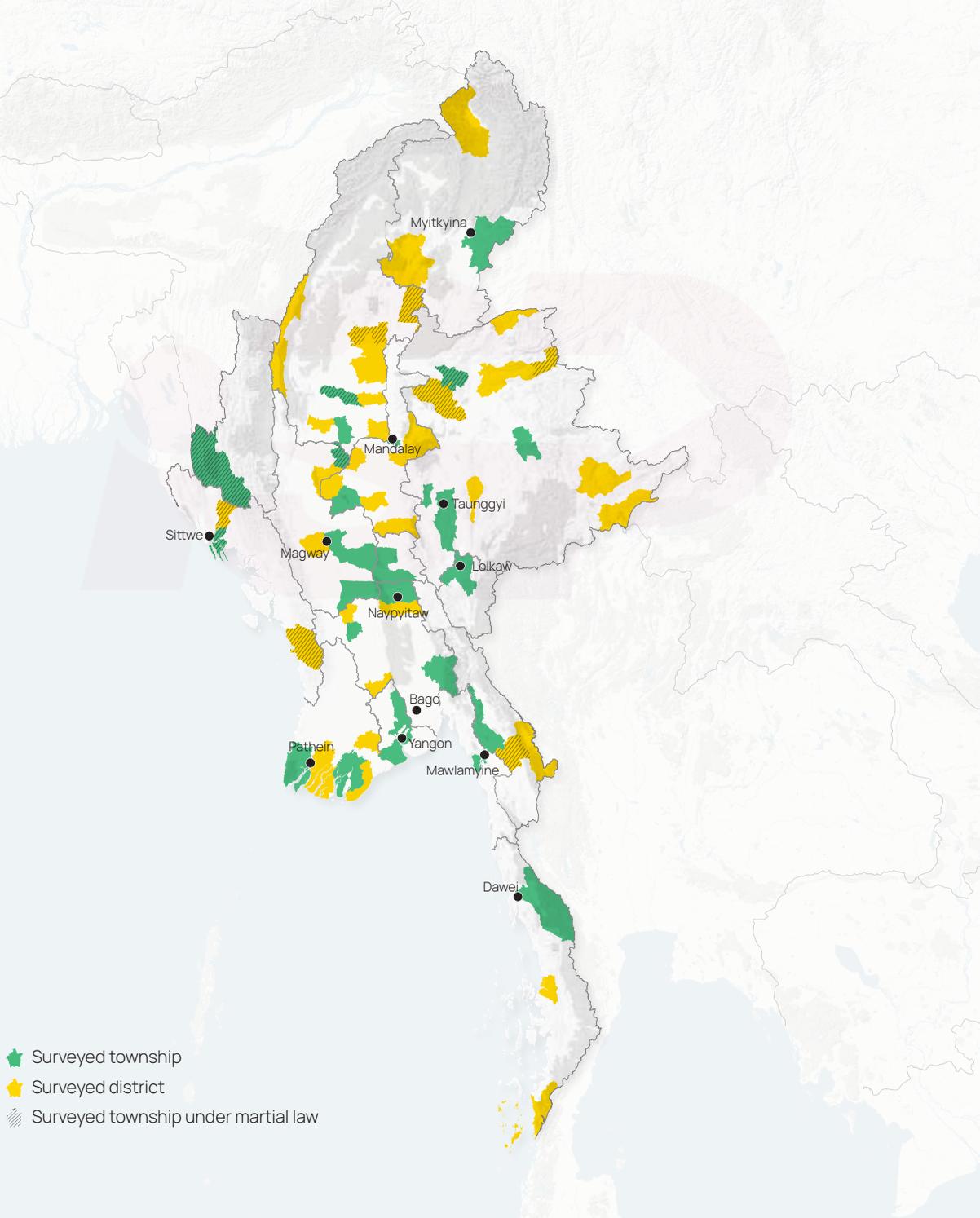


■ Age Group



■ Surveyed Townships

In late September 2025, ISP-Myanmar conducted a nationwide survey to assess how conflict-related trade disruptions have affected the public. Among the **85 townships** surveyed, **32** were district townships, and **11** were designated under the regime's martial law.



a

Commodity Shortages and Price Surge

During the 60 days preceding September 23, 2025, a vast majority of respondents—**85 percent (863 respondents)**—reported shortages of imported goods caused by trade blockages (see Figure 1)³.

The most common shortages were everyday consumer goods. Medicine shortages were the second most common, followed by dry food, basic food items and personal hygiene products. 66 percent (674 respondents) reported shortages of consumer goods, while 61 percent (620 respondents) cited shortages of basic medicines. Only three percent (36 respondents) said they had experienced no shortages (see Figure 2).

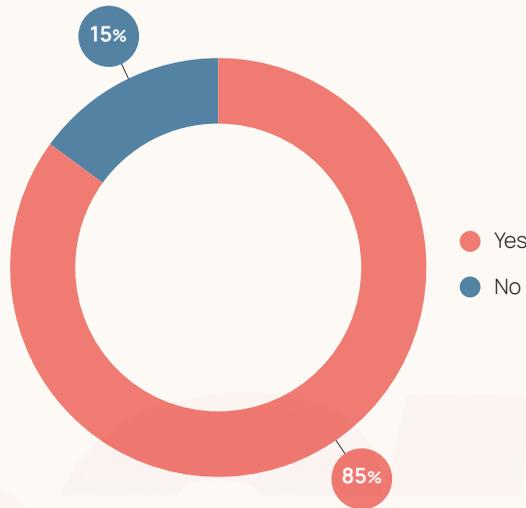
³ The ISP-Myanmar's socioeconomic survey was conducted in the last week of September 2025, enquiring into the implications of trade disruptions by extensive conflict, China's five-cut blockade intervened to get a successful ceasefire in Northern Shan State, and the junta's intentional shutdown order of border trade with Thailand on August 24, 2025. The regime claimed its objective was to curb illegal trade, to cut off revenue for ethnic armed organizations and to regulate foreign-currency exchange so that the Myanmar Kyat appreciates. The survey then explores the experiences of the public within the 60 days preceding September 23.

Rising prices compounded these problems; 48 percent (486 respondents) said prices had increased by 1.5 times, while 40 percent (403 respondents) said prices had doubled. Another seven percent (68 respondents) and two percent (22 respondents), respectively, reported that prices had risen threefold and fourfold. Only three percent (36 respondents) said they had seen no price increase at all (see Figure 3).

Among the 979 respondents who answered that prices had increased, when they were asked which goods had become more expensive, 79 percent (over 770 respondents) pointed to daily consumer items and basic foodstuffs while 73 percent (710 respondents) to basic medicines (see Figure 4). Unsurprisingly, 92 percent (938 respondents) said these developments had directly affected their families and themselves, while eight percent (77 respondents) reported no impact (see Figure 5).

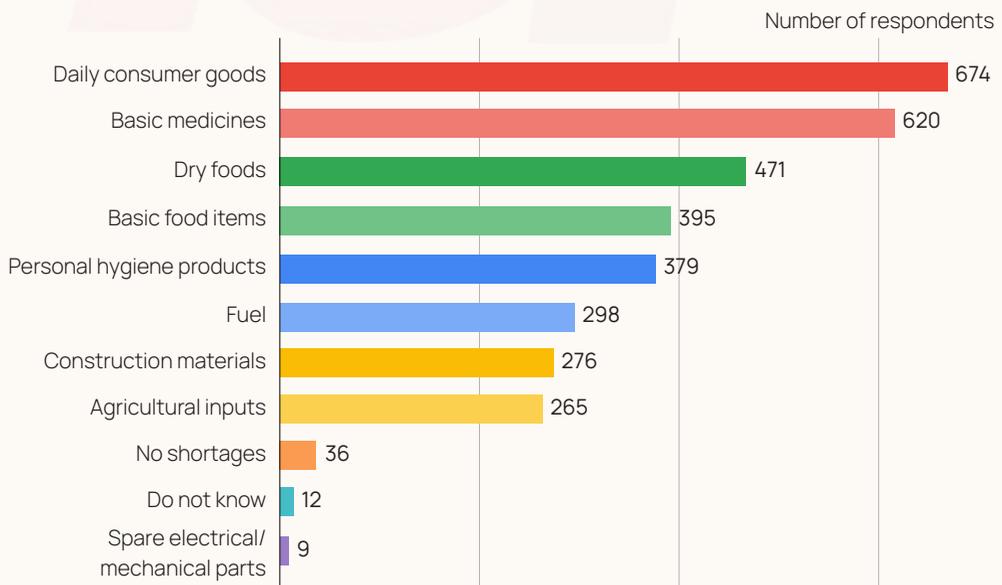
Market conditions have also deteriorated. Half of the respondents (510 people) said it had become slightly harder to purchase goods for their households over the past 60 days, and 25 percent (250 respondents) said conditions had "noticeably worsened." A further 23 percent (235 respondents) reported no change, while 1.8 percent (18 respondents) said the situation had improved, and only 0.2 percent (two respondents) found that conditions were notably improved (see Figure 6).

■ **Figure 1:** Have there been any shortages of imported goods?



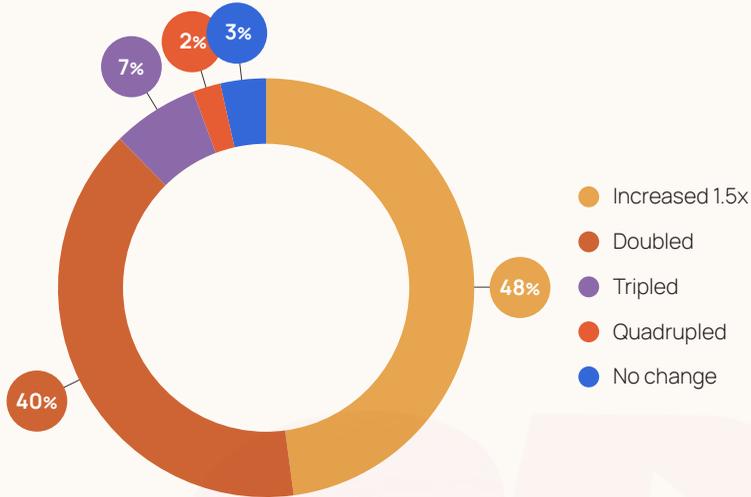
Note: The data reflect conditions during the 60 days leading up to September 23, 2025.

■ **Figure 2:** Which imported goods are currently in short supply in your area?



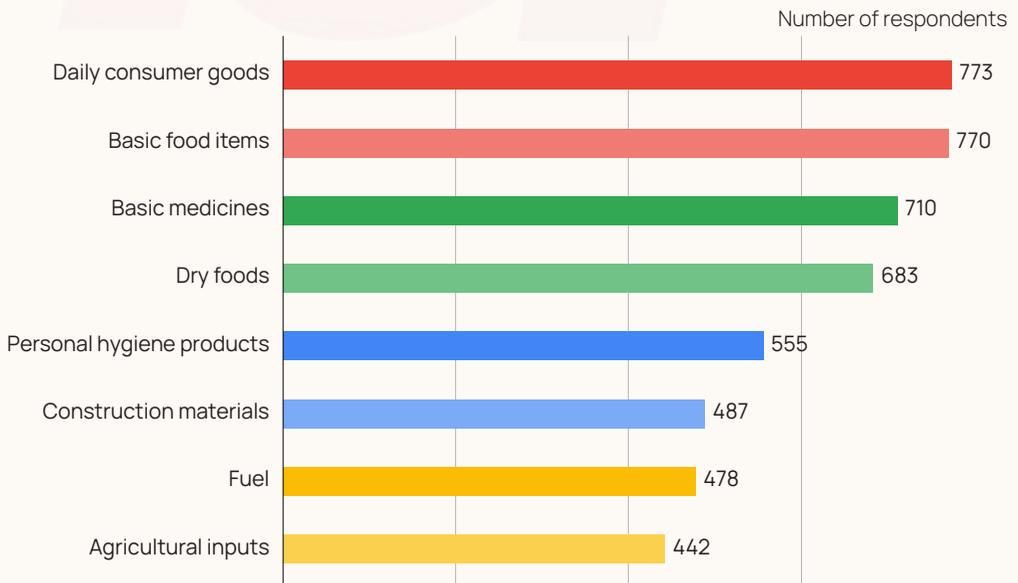
Note: This question allows multiple selections.

■ Figure 3: Have the prices increased?



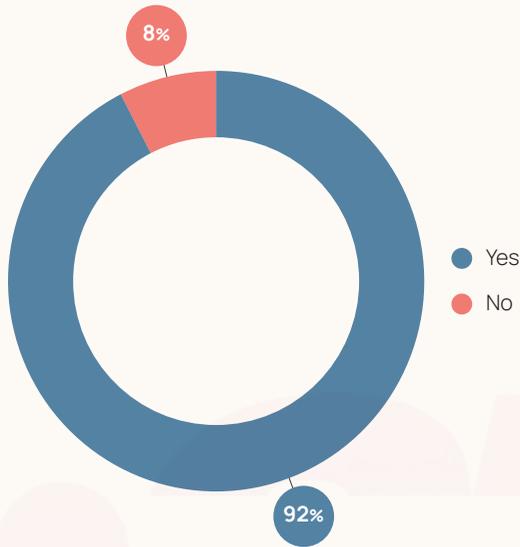
Note: The data reflect conditions during the 60 days leading up to September 23, 2025.

■ Figure 4: Which goods have become more expensive?



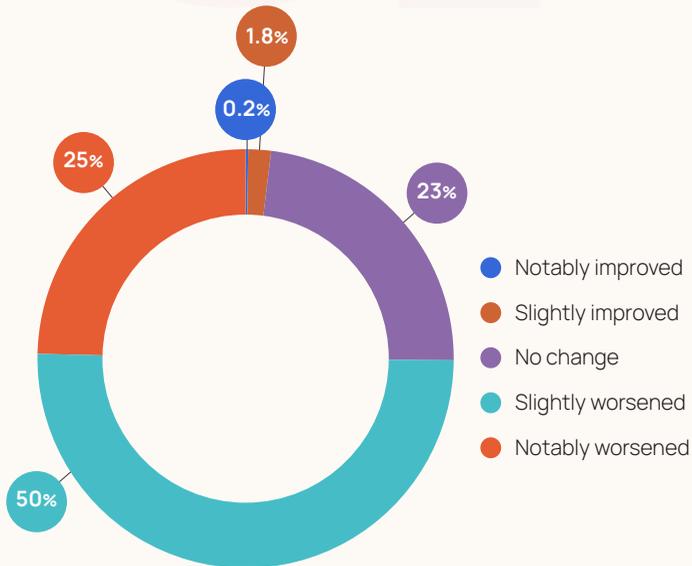
Note: This question allows multiple selections.

■ **Figure 5:** Has your household been impacted by goods shortages and rising prices?



Note: The data reflect conditions during the 60 days leading up to September 23, 2025.

■ **Figure 6:** How available are basic goods for you to purchase for your family?



Note: The data reflect conditions during the 60 days leading up to September 23, 2025.

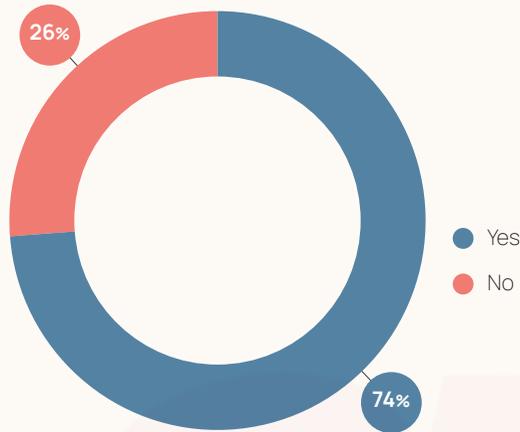
b

Impacts on the Healthcare Sector

The healthcare sector has been hit hard by the crisis, leading to shortages and price hikes of medicines. Furthermore, there have been difficulties in visiting hospitals or clinics and in purchasing medicines or medical supplies.

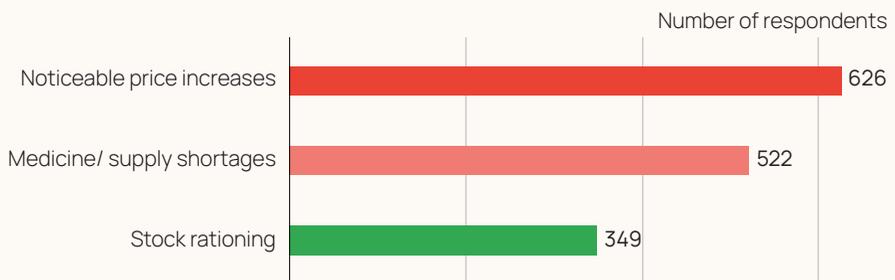
In the past 60 days, **74 percent (749 respondents)** reported difficulties in purchasing medicines or medical supplies (see Figure 7), primarily due to sharp price increases (see Figure 8). While 60 percent (606 respondents) said they could still reach hospitals or clinics without major difficulty, 27 percent (270 respondents) found it hard to do so, 10 percent (107 respondents) could only go occasionally, and three percent (32 respondents) said they could not go at all (see Figure 9).

■ **Figure 7:** Have you experienced any difficulties purchasing medicines or medical supplies?



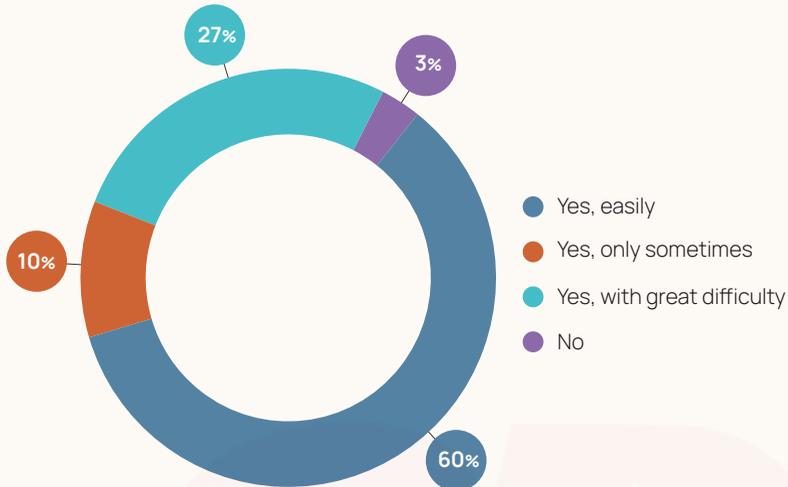
Note: The data reflect conditions during the 60 days leading up to September 23, 2025.

■ **Figure 8:** What are the main difficulties in purchasing medicines or medical supplies?



Note: This question allows multiple selections.

■ Figure 9: Are you able to access hospitals or clinics?



Note: The data reflect conditions during the 60 days leading up to September 23, 2025.

ISP နှင့်အတူ မိနစ် ၃၀

30 MINUTES
with the **ISP**

The Spirit Is Willing, But The Flesh Is Weak

The Socioeconomic Cost of
Myanmar's Disrupted Trade Routes



The full event discussing the findings of this survey
is now available on the ISP-Myanmar website.

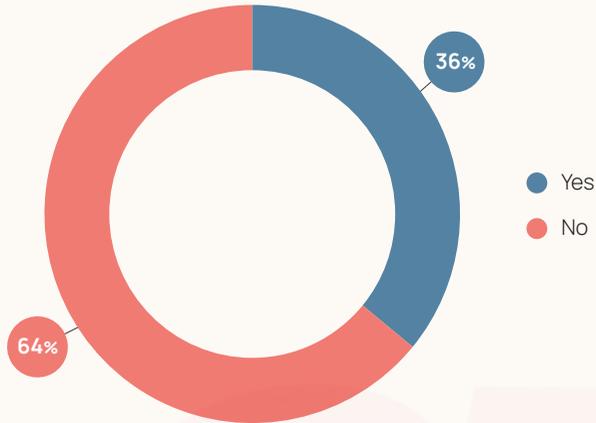


Impacts on Livelihoods

The conflict-driven disruptions along trade routes have also affected the livelihoods of the respondents and their households. When asked whether there had been changes to their job or livelihood within 60 days before September 23, 2025, **36 percent (365 respondents)** reported that they or their family members had experienced such a change, while the other **64 percent (650 respondents)** had not (see Figure 10).

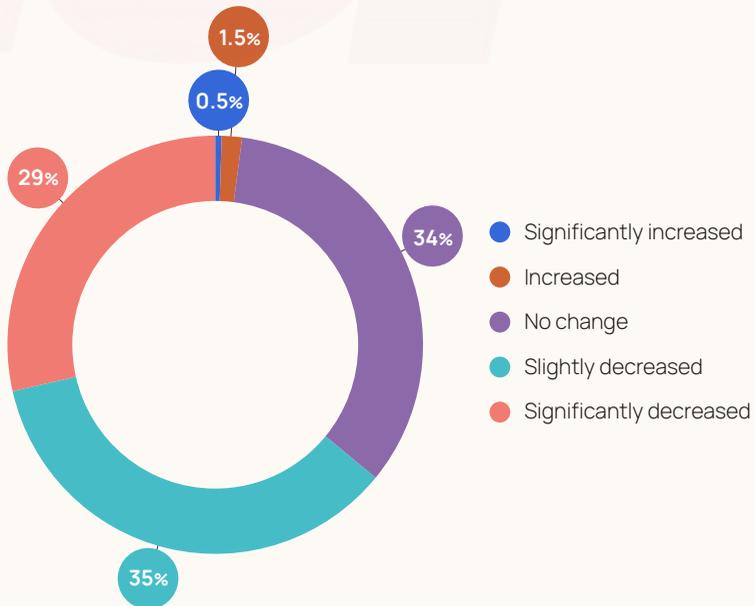
When asked whether their income had changed, 34 percent (344 respondents) reported no change. Meanwhile, 35 percent (360 respondents) reported a slight decrease, and 29 percent (290 respondents) reported a significant decrease. In contrast, a very small percentage of respondents experienced an income increase: only 1.5 percent (16 respondents) saw a raise, and an even smaller 0.5 percent (five respondents) reported a significant increase (see Figure 11).

■ Figure 10: Have you had to change your job or livelihood?



Note: The data reflect conditions during the 60 days leading up to September 23, 2025.

■ Figure 11: Has there been a change in your income?



Note: The data reflect conditions during the 60 days leading up to September 23, 2025.

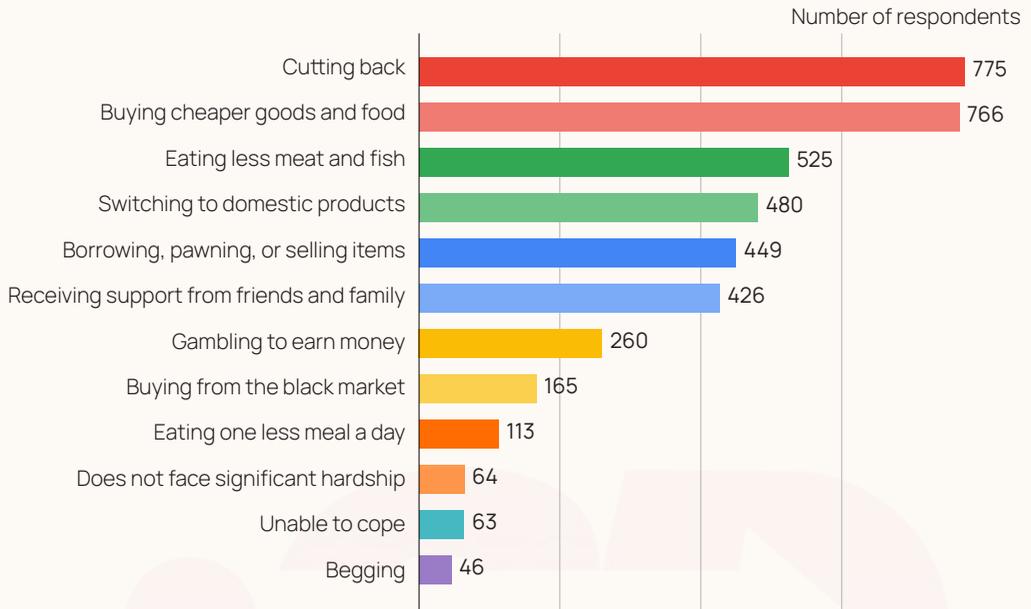
d

Daily Struggles and Coping Mechanisms

The combination of a declining economy and ongoing armed conflicts has exacerbated the population's socio-economic crisis. In response to the crisis—characterized by insufficient income, commodity shortages, and price hikes—respondents primarily adopted some coping strategies: **76 percent (775 respondents)** reported cutting back, and a very similar **75 percent (766 respondents)** stated they only purchase cheaper goods and food. More than half — **52 percent (525 respondents)** — are also reducing their meat and fish consumption. Other coping strategies include borrowing money, pawning possessions, and eating one less meal a day (see Figure 12).

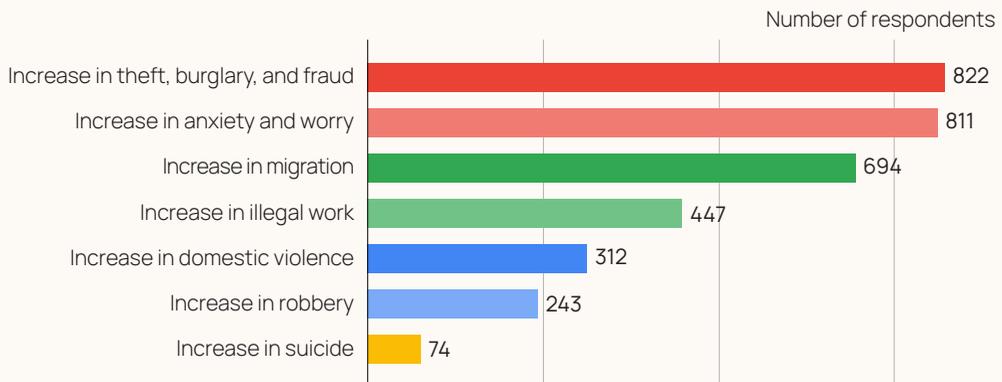
Inquiring into the social impact of the economic crisis, the survey found that 81 percent (822 respondents) reported a widespread increase in theft, burglary, and fraud, alongside a pervasive rise in anxiety and worry by 80 percent (811 respondents). The crisis has spurred an increase in migration, reported by 68 percent (694 respondents), and a rise in people engaging in illegal work, reported by 44 percent (447 respondents). Alarmingly, a rise in domestic violence was reported by 31 percent (312 respondents); an increase in robbery was observed by 24 percent (243 respondents); and, most distressingly, an increase in suicide within the community was reported by seven percent (74 individuals) (see Figure 13).

■ Figure 12: How are you and your household coping with current conditions?



Note: This question allows multiple selections.

■ Figure 13: What social impacts have you observed as a result of the economic crisis?

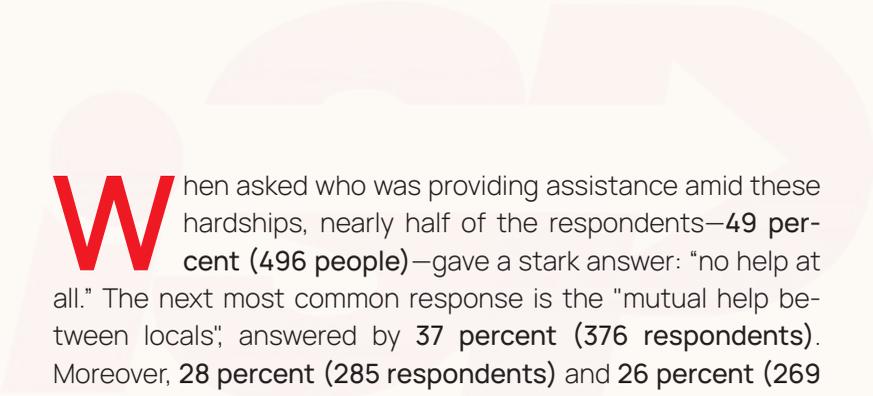


Note: This question allows multiple selections.



e

Capacity for Support and Hope



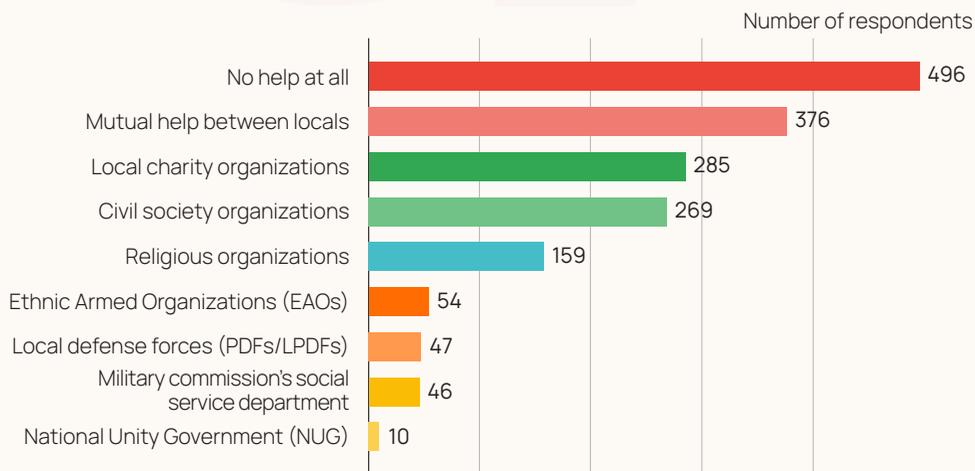
When asked who was providing assistance amid these hardships, nearly half of the respondents—**49 percent (496 people)**—gave a stark answer: “no help at all.” The next most common response is the “mutual help between locals”; answered by **37 percent (376 respondents)**. Moreover, **28 percent (285 respondents)** and **26 percent (269 respondents)** reported the support of local charity groups and civil society organizations, respectively. In sharp contrast, institutional help was reported as minimal. The SSPC’s administrative capacity to provide support is seen as minimal, while that of EAOs, local defense forces (PDFs and LPDFs), and the NUG remains limited (see Figure 14).

Inquiring the question of whether the respondent and the family feel a sense of financial security in 2025 compared to 2024, a striking majority —89 percent (899 respondents) —said they do not (see Figure 15). When asked to explain their responses, the respondents cited price increases and an unstable economy (see Figure 16). When asked about the most urgent need amid these immediate pressures, the top answer was job ▶

- ▶ opportunities, with 80 percent (817 respondents). The second most critical need, indicated by 64 percent (647 respondents), was security, followed by healthcare services as the third pressing need, at 57 percent (574 respondents). Over half (more than 500 respondents) cited food and transportation as an urgent need. Education was cited by the relatively smallest proportion of respondents, at 35 percent (355 respondents) (see Figure 17).

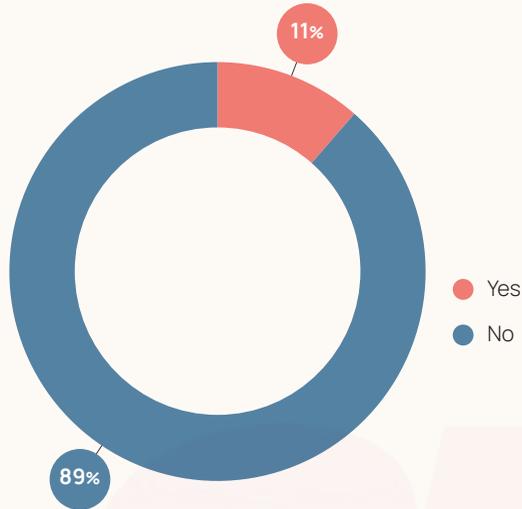
At the end of the survey, when summarizing their views about the ongoing situations, 53 percent (539 respondents) reported that they can continue to struggle on. However, 42 percent (424 respondents) believe the situation is hopeless, while only five percent (52 respondents) expressed optimism, saying things will get better (see Figure 18).

■ **Figure 14:** Who is mainly providing help?



Note: This question allows multiple selections.

■ **Figure 15:** Compared to last year, do you feel that your family has enough resources to meet daily needs?



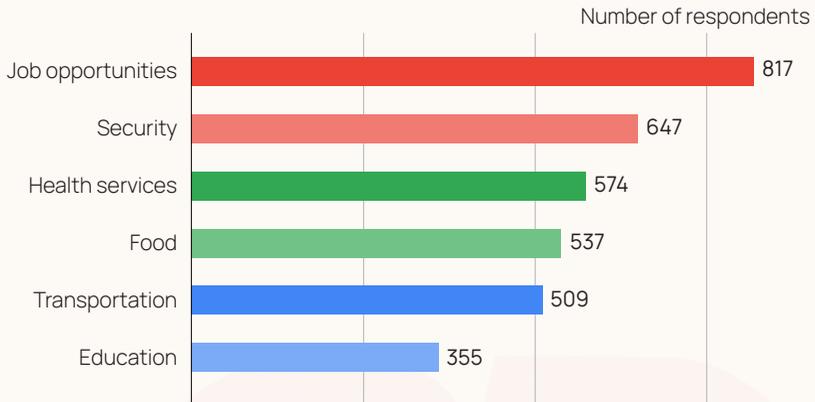
Note: The data reflect conditions during the 60 days leading up to September 23, 2025.

■ **Figure 16:** Why do you feel that your family does not meet daily needs?



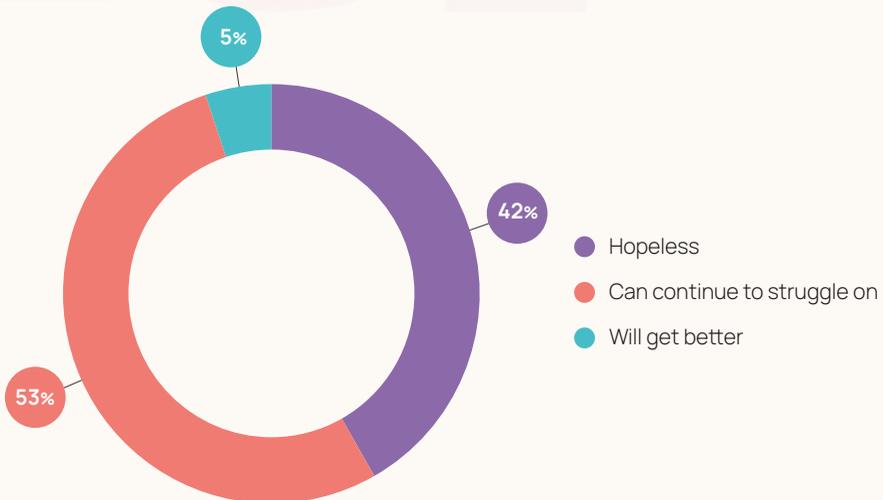
Note: This question allows multiple selections.

■ **Figure 17:** What is the most urgent need amid widespread economic hardship?



Note: This question allows multiple selections.

■ **Figure 18:** How do you view the current situation today?



Note: The data reflect conditions during the 60 days leading up to September 23, 2025.



Survey Methodology

This brief survey was conducted to examine the impact of conflict-related trade blockades on the public. A total of **1,015 respondents** from 85 townships across all 15 regions and states of Myanmar, including the Naypyitaw Council Territory, participated in the study.

A quantitative approach was used in the data-collection. A sampling frame was created for a sample population targeting 1,020 people across 85 townships (12 locals per township). Among these townships, 32 district-level townships and 11 townships under martial law were included, but due to communication difficulties, only 1,015 responses were received.

Purposive sampling was employed, with each township's sample required to meet four criteria: (1) respondents must be local residents of the township, (2) include at least five women, (3) must reside in one of the area types: urban, rural, border, and IDP camp residents, and (4) be aged 18 or older. Data was collected via online surveys, phone calls, and in-person interviews from September 23-28, 2025.

The survey was conducted by the respective research team leaders in accordance with the ISP-Myanmar’s security protocols and ethical guidelines. During the interview, respondents were informed and consented to the secure collection of their personal information and responses in accordance with the ISP-Myanmar’s data security policies. Upon completion of the survey, the data collector stores the collected data in accordance with ISP-Myanmar’s established protocols. ■

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The full event discussing the findings of this survey is now available on the ISP-Myanmar website.



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