

ISP Insight Email

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THE BEST OF 2024 Our Audiences' TOP PICKS





PROMOTING LEADERSHIP AND
STRENGTHENING CIVIC PARTICIPATION

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EDITOR'S NOTE

The year 2024 has passed. Myanmar has endured great adversaries from Buddhism's teaching such as the adversaries of water, fire, theft, and evil rulers. Myanmar people have also encountered disasters and tragedies. The notion of everyday peace has become a myth; socioeconomic conditions are strained, and it is a real struggle just to survive in the nation's political and armed conflicts. ISP-Myanmar empathizes with Myanmar's populace who are struggling daily. As the saying goes, "A burden shared is a burden halved." We believe people can overcome these profound challenges by offering support and kindness to one another.

ISP-Myanmar publishes this Insight Email as a special edition. We would like to share the favorites of our audiences among our 2024 published research and findings. In 2024, ISP-Myanmar published 557 research outputs which received positive responses from our audiences. Our social media posts and media outputs reached 48 million people, generating over 3.6 million engagements through reactions, comments, and shares. This support buoys our commitment to persevere. Addressing a national crisis demands not just physical strength but intellectual vigor as well. As the Burmese proverb says, "The reeds sway with the island as the island anchors the reeds," the writer cannot thrive without the audience. In this spirit, we sincerely extend our deepest gratitude to our readers, whose support is the foundation of ISP-Myanmar's continued existence.

The 10 most-read topics of 2024 reflect the interests and engagement of our social media audience and ISP's core community, the Gabyin Community. Before diving in, we invite you to explore "ISP-Myanmar in Numbers - 2024."

The following figures indicate the interest of our audiences in the research analyses. We will briefly recap the top ten topics of the year in this Insight Email. On that note, we will also delve deeper into these topics in 2025. Moreover, we aim to expand our understanding of other key areas and publish sharp findings and analyses. 2024 proved challenging. ISP-Myanmar wishes a safe and prosperous 2025 for all. ■

■ ISP-Myanmar in Numbers - 2024

19,018

The ISP Gabyin Community, an exclusive virtual space for subscribed members, has amassed over 19,000 members.

88%

The ISP Gabyin Community members boast an impressive average email open rate of 88 percent.

557

More than 500 issues were published in 2024.

5,707,007

The ISP-Myanmar's TikTok channel was launched in June 2024 and garnered over 5 million views in just six months.

344

Media and research institutes cited ISP-Myanmar's work 344 times.

48,575,177

ISP-Myanmar's research findings extended to nearly 48.58 million users on social media.

5,133,462

Videos from ISP-Myanmar on Facebook and YouTube accumulated over 5 million minutes of watch time.

377,366

ISP-Myanmar has attracted over 370,000 new followers on social media.

■ 2024 Top Ten Picks of ISP Audiences

- 1 Naypyitawlogy
- 2 Myanmar's Key Stakeholders and Their Perceptions of Sino-Myanmar Relations
- 3 Seeking a Process Strategy for Myanmar: China's Initiative
- 4 The Terror Twins of Climate and Conflict
- 5 The Rise of Princelings
- 6 Making Data Speak
- 7 Sanctions with Chinese Characteristics
- 8 Facing the Tailspin, The Country Shall Fall Upside Down
- 9 Future Federal Army
- 10 The Political Economy of Myanmar's Conflict



THE BEST OF 2024
Our Audiences'
TOP PICKS



Photo-AFP

1

NAYPYITAWLOGY

Naypyitawlogy studies the shifts and climate of Naypyitaw's generals and the State Administration Council (SAC). In 2024, ISP-Myanmar released three issues on this theme:

“Naypyitawlogy 3 - The Old Guards and Min Aung Hlaing,”
“Naypyitawlogy 4 - SAC’s Ricketty Administration,” and
“Naypyitawlogy 5 - SAC Leader: The Solo Show.”

These editions are most read by the audience, revealing a keen interest in the dynamics at play within Naypyitaw.



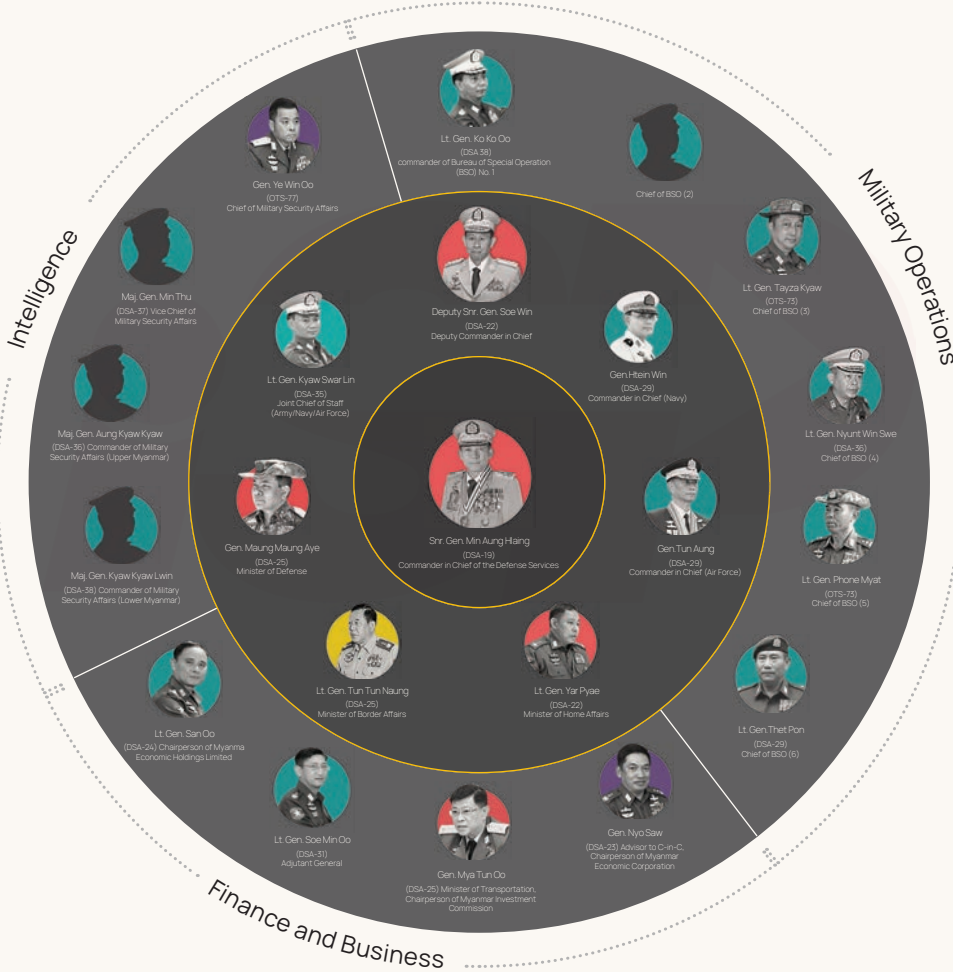
Over 26 Reshuffles in SAC's Top Leadership

Data Matters Number 145

ISP Myanmar

Snr. Gen. Min Aung Hlaing, the leader of the State Administration Council (SAC), has orchestrated **at least 26 reshuffles** within his inner circle within four years. There have been **no less than 13 changes** in the chief of the Bureau of Special Operations (BSO), with the Bureau of Special Operations No. 6 (BSO-6), based in Naypyitaw, experiencing **five reshuffles**.

SAC Leader and Current Inner Circle

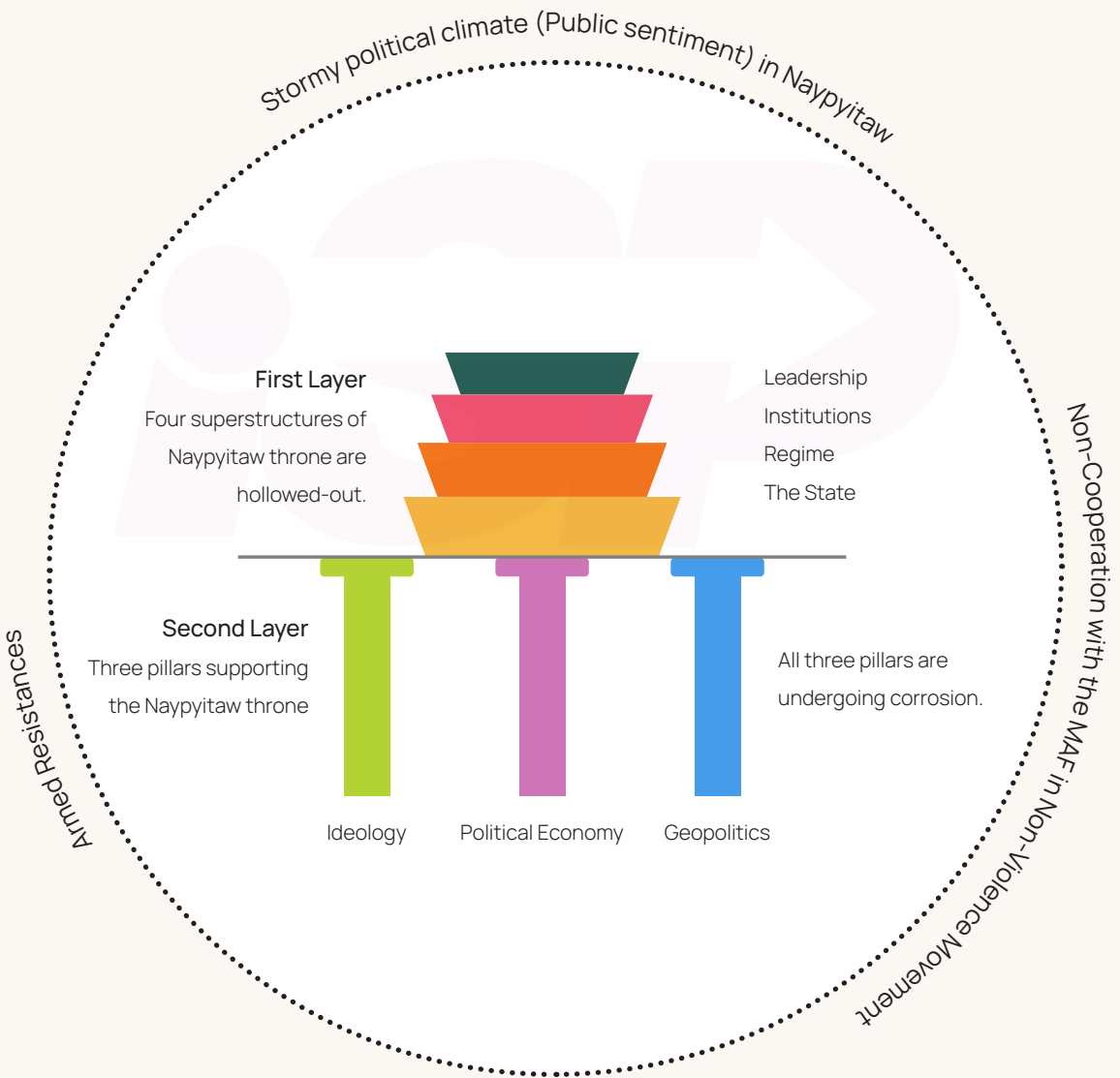


- Inner Circle of Leadership
- High-ranked Military Officers
- SAC Members
- SAC and Government Members
- Government Members

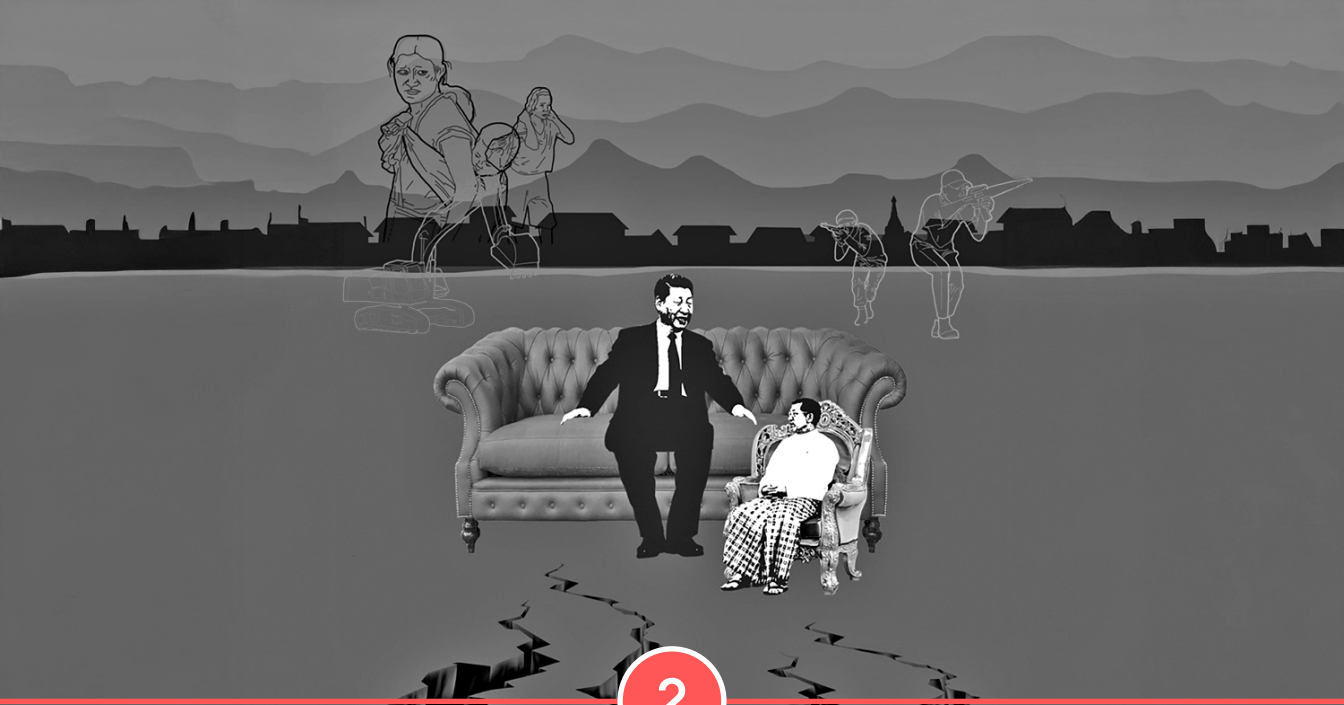
The data presented here is based on ISP-Myanmar's research as of January 16, 2025. Please note that the data presented may vary from other sources due to differences in methodology and data availability. Following the North Eastern Command takeover, Lt. Gen. Naing Naing Oo, the chief of Bureau of Special Operations No. 2 (BSO-2) commander responsible for military operations in the Shan and Karenni regions, was stripped of his rank. His position remains unfilled to this day.

■ Three Words Characterizing Naypyitaw

Three descriptors can encapsulate Naypyitawlogy: **hollowed out**, **corrosion**, and **stormy**. The four superstructures of Naypyitaw’s governance—**state**, **regime**, **institutions**, and **leadership**—are notably **hollowed out**. The underlying supports—**ideology**, **political economy**, and **geopolitics**—exhibit significant **corrosion**. Additionally, the political climate, reflected in the public’s political sentiment, remains predominantly **stormy**.







2

Myanmar's Key Stakeholders and Their Perceptions of Sino-Myanmar Relations

China Studies Program of ISP-Myanmar continues to delve into the nuances of China-Myanmar relations. To capture perspectives on this bilateral relationship, ISP-Myanmar conducts an annual survey titled *“Myanmar’s Key Stakeholders and Their Perceptions of Sino-Myanmar Relations.”* Published in 2024, the 2023 survey became the second most-read piece of the year.

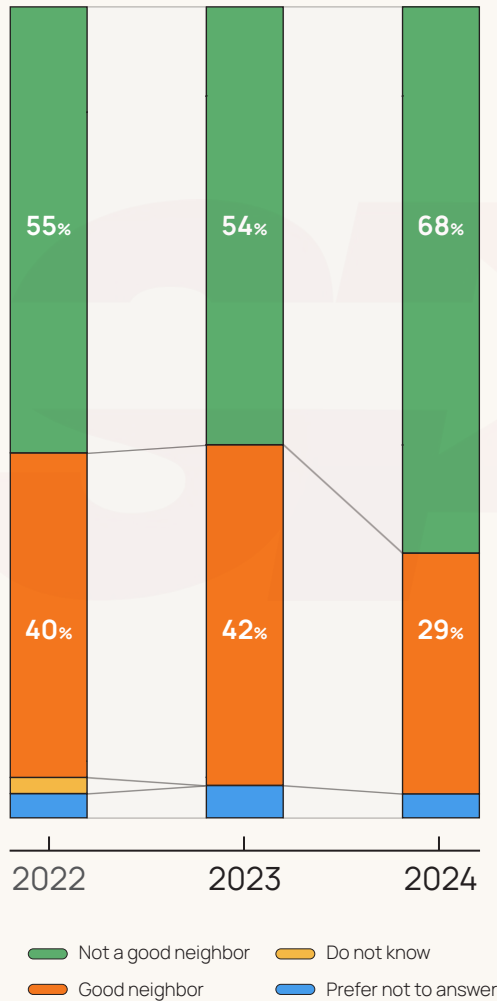


■ Growing Perception That China Is Not a Good Neighbor

Research Findings

ISP Myanmar

According to survey results conducted by ISP-Myanmar in 2024, an increasing number of people believe that China is not a good neighbor. This perception rose from **55 percent** in the 2022 survey and **54 percent** in the 2023 survey to **68 percent** in the 2024 survey.



The survey for *"Myanmar's Key Stakeholders and their Perceptions of Sino-Myanmar Relations—A Survey (2024)"* was conducted from October to November 2024 and the report will soon be published.

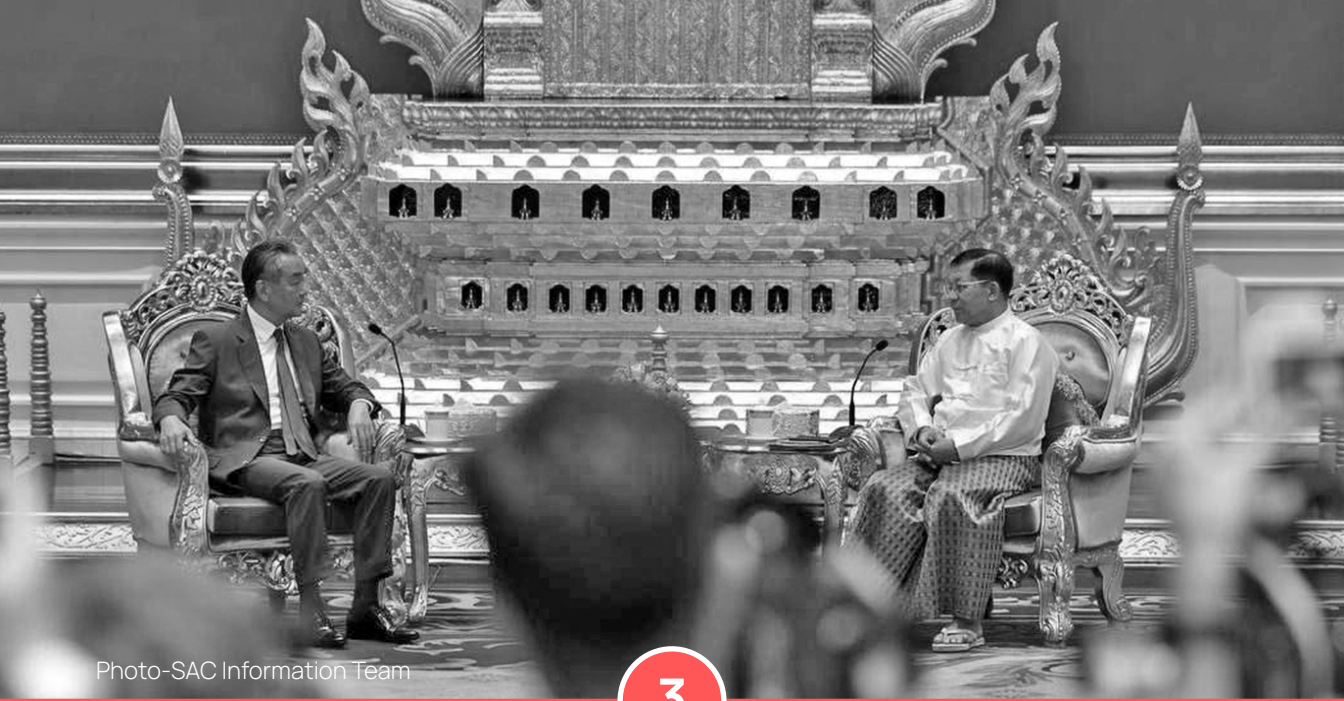


Photo-SAC Information Team

3

Seeking a Process Strategy for Myanmar: China's Initiative

The third most-read publication in 2024 was an ISP OnPoint titled “Seeking a Process Strategy for Myanmar: China's Initiative.”

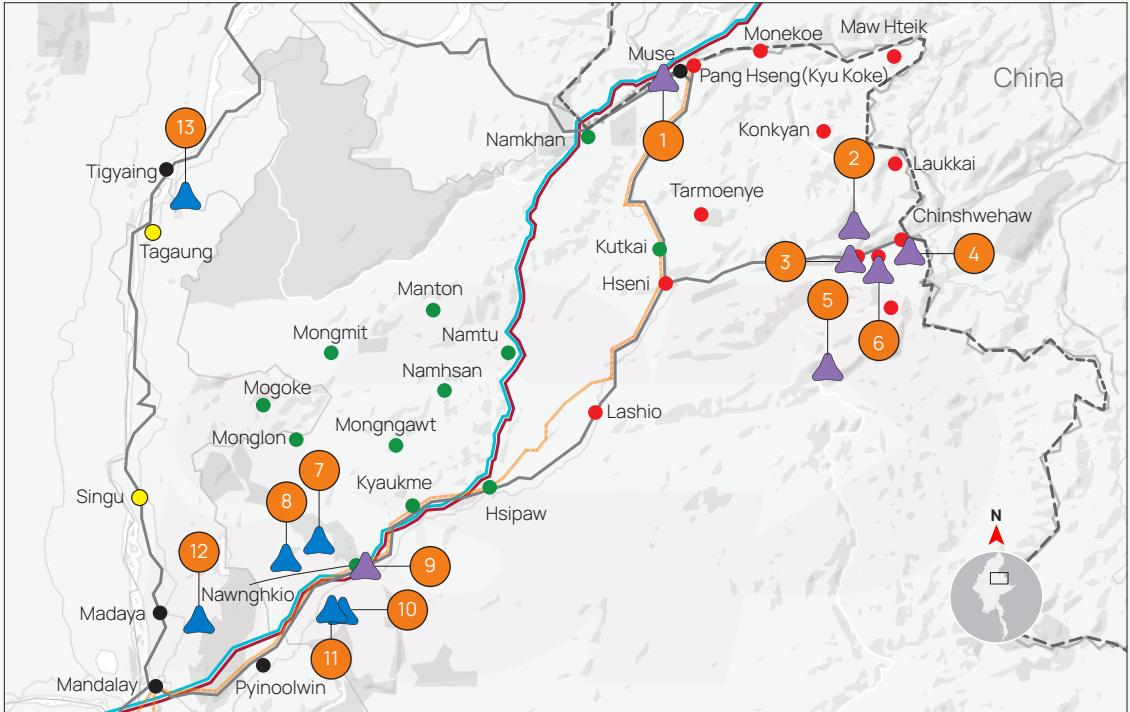
This piece analyzed the Chinese Foreign Minister Wang Yi's visit to Naypyitaw and three bottom lines for Myanmar's crisis.

Any strategy to resolve Myanmar's crisis must be firmly rooted in the will of its people. The strategy must also be astutely designed to engage all stakeholders and allow room for meaningful negotiation and collaboration. The success of China's initiative can be assessed based on how well these conditions are met. At the same time, it is essential to carefully weigh Beijing's economic interests and potential responses—without underestimating them.



13 Chinese Projects Seized in Northeast

Ethnic Armed Organizations (EAOs) and People's Defense Forces (PDFs) have fully seized 13 out of 23 Chinese projects located in northern Shan State and central lowlands.



- Towns Controlled by SAC
- Towns Seized by MNDAA
- Towns Seized by TNLA
- Towns Seized by PDFs
- ▲ Chinese Projects Fully Controlled by EAOs
- ▲ Chinese Projects Seized by EAOs and PDFs
- Natural gas pipeline
- Oil pipeline
- Railways
- Roads
- * Planned Projects

● Values of Chinese Projects Seized by EAOs and PDFs

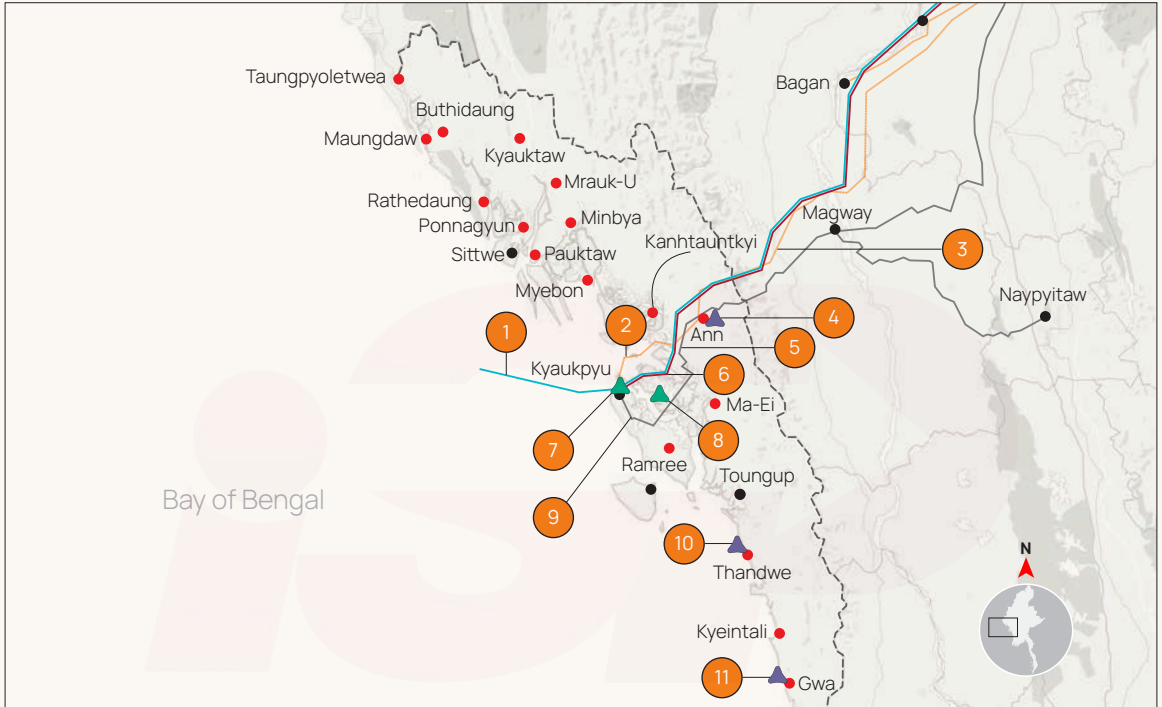
No.	Project	Project Value (in USD)
1	Cross border Economic Cooperation Zone*	8 Million
2	Kunlong Dam*	1,400 Million
3	Kunlong Bridge	19.6 Million
4	Cross border Economic Cooperation Zone*	4 Million
5	Nong Pha Dam*	Value Unknown
6	Lancang-Mekong Warehouse and Awareness Center	Value Unknown

No.	Project	Project Value (in USD)
7	Crown Cement Plant	Value Unknown
8	Sinn Shwe Li Sugar Mill No.1	Value Unknown
9	Goteik Bridge and New Road Implementation*	100 Million
10	Sinn Shwe Li Sugar Mill No.2	Value Unknown
11	Sinn Shwe Li Sugar Mill No.3	Value Unknown
12	Alpha Cement Plant	Value Unknown
13	Tagaung Nickel Processing Plant	855 Million

Data as of January 16, 2025. The data are based on ISP-Myanmar's research. Please note that the data presented may vary from other sources due to differences in methodology and data availability.

AA Gained Control of All Chinese Projects in Rakhine

The Arakan Army (AA) has controlled 11 Chinese projects in Rakhine State, overseeing all regional projects. The AA has complete control over the wind power projects in Thandwe, Ann, and Gwa.



- Towns Controlled by SAC ▲ Chinese Projects Partially Controlled by AA ▲ Chinese Projects Fully Controlled by AA — Natural gas pipeline — Railways
- Towns Seized by AA — Oil pipeline — Roads

● All Chinese Projects in Rakhine State Under AA's Control

No.	Project	Project Value (in USD)
1	China-Myanmar Natural Gas Pipeline	1,090 Million
2	Kyaukphyu-Ann Railway*	Value Unknown
3	Mandalay-Kyaukphyu Railway*	11,000 Million
4	Ann Wind Power Project*	Value Unknown
5	Mandalay-Kyaukphyu Road*	Value Unknown
6	China-Myanmar Oil Pipeline	1,500 Million

No.	Project	Project Value (in USD)
7	Kyaukphyu Deep Sea Port and Special Economic Zone*	9,600 Million
8	Kyaukphyu Power Plant	180 Million
9	Kyaukphyu-Naypyitaw Road*	Value Unknown
10	Thandwe Wind Power Project*	Value Unknown
11	Gwa Wind Power Project*	Value Unknown

(*) Planned Projects



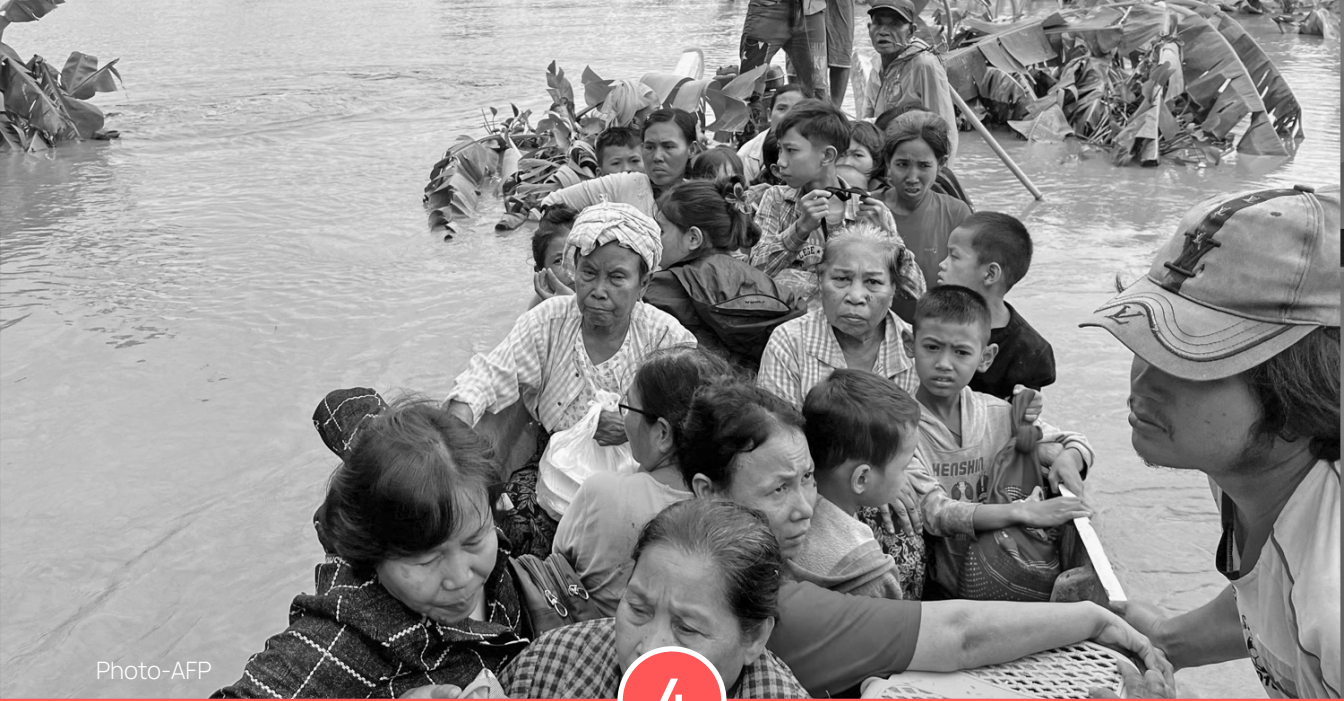


Photo-AFP

4

The Terror Twins of Climate and Conflict

In 2024, Myanmar's populace of over 5.6 million suffered from floods, and 24 percent of agricultural land was submerged. This was a mere fraction of the broader havoc wrought by natural disasters. In times of conflict and climate change crises, Myanmar's society urgently needs the **emergence of everyday champions**. This publication was also one of the most-read pieces in 2024. Furthermore, historian Dr. Thant Myint Oo's warning in 2019 about natural disasters sparked widespread public debate.



QUOTE

“Yangon will be an Island”

“The impact of climate change on Myanmar will be nothing less than catastrophic. And the impact will come not over centuries or decades but over years. Myanmar today is in a climate emergency... Even a two-degree warmer world, which we could reach well before mid-century, will be devastating for this country. We will see intense storms and cyclones like Nargis more and more frequently, perhaps, every year we will see sea levels rise, inundating the coastline parts of the Ayeyarwaddy delta and areas around Yangon. We will see unbearable heat not for weeks but for months of the year. We will see prolonged drought and unpredictable rains, which, combined with intense heat and drought, may make agriculture impossible in the dry zone and

the delta. We will see mass extinctions of animal species in Myanmar and the spread of new diseases... (If we move to) A four-degree warmer planet, much of this country, much of Myanmar will become uninhabitable. The Ayeyarwaddy delta will be gone, as well as much of Rakhine state. Yangon will be an island. The center of the country will be too hot to live for humans as well as for most animals. We will see migration of millions of people or tens of millions of people. Bangladesh next door will also be in severe crisis and will produce tens of millions of climate refugees. We may well see this four-degree warmer world well before the end of this century, well within the lifetime of young people today.” ■



Dr. Thant Myint U

Historian

Excerpted quote from Season 1, Episode 7 of ISP-Myanmar's “*Yaw Min Gyi Zayat*” talk show, held on June 22, 2019, entitled: “Climate Action: More Urgent Than Ever.”

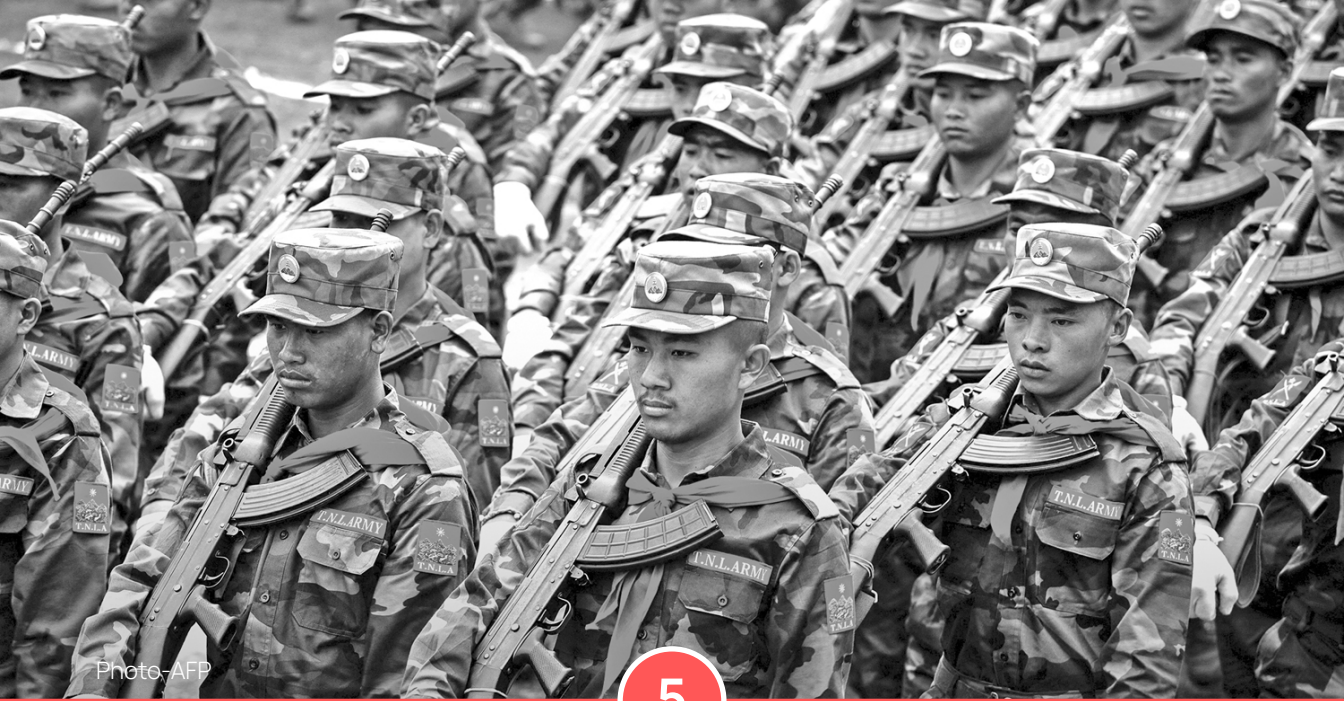


Photo-AFP

5

The Rise of Princlings

ISP-Myanmar is researching the emerging new generation leaders from EAOs and the resistance movement under the theme “The Rise of Princlings.” The first edition of the issue delved into fresh faces of Wa leadership (UWSP/UWSA), and its sequel highlighted the Ta’ang’s (Palaung). The younger generation of leaders is naturally more inclined to pursue new ideas and take risks rather than sticking to the status quo. ISP-Myanmar compared this phenomenon with the pride of “Princlings.” Resolving conflicts is a complex challenge, and those who achieve victory consecutively may be prideful of their endeavors. ISP-Myanmar will continue researching this topic throughout 2025.

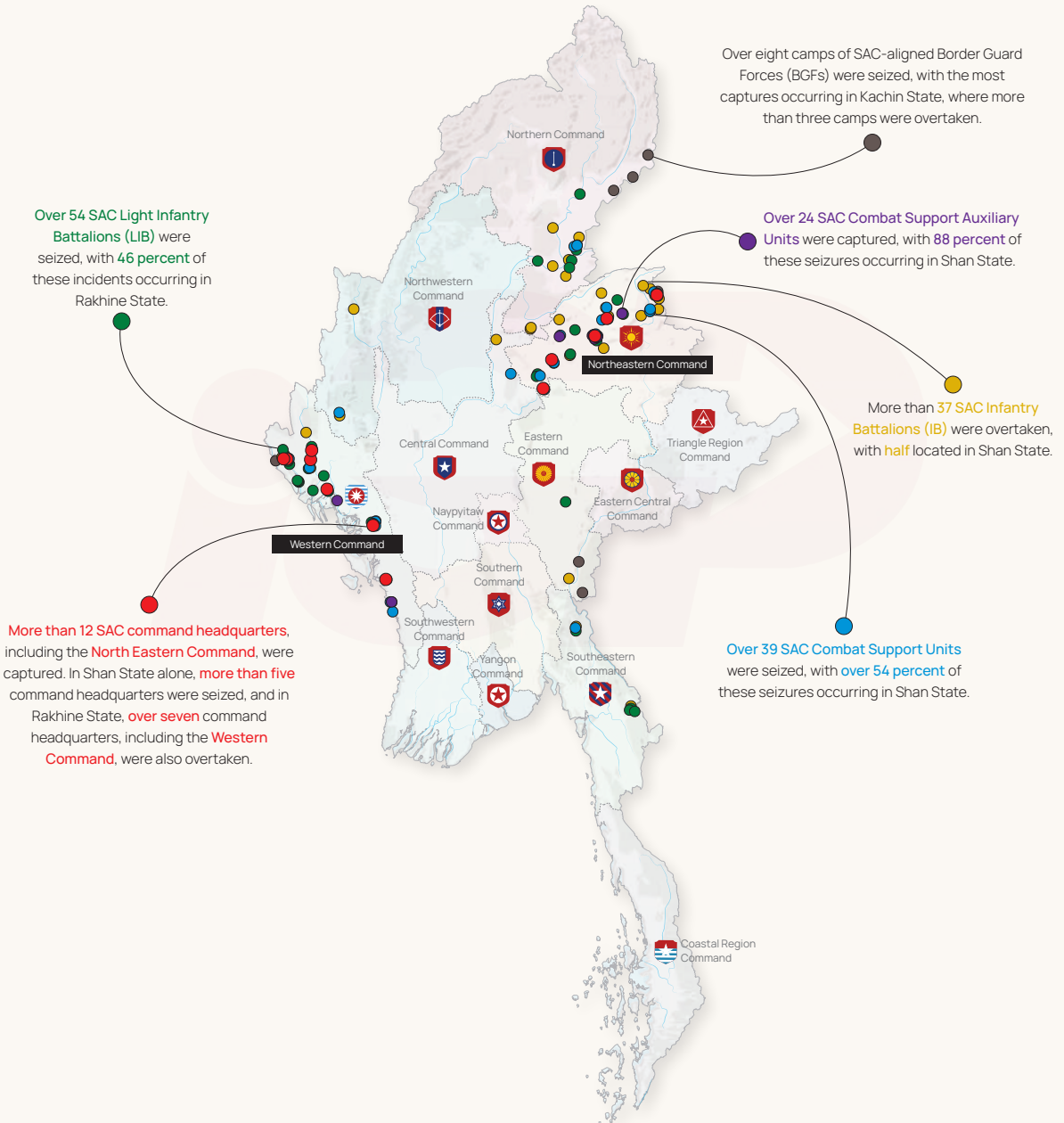


Nearly 180 SAC-Camps Fall Under Resistance

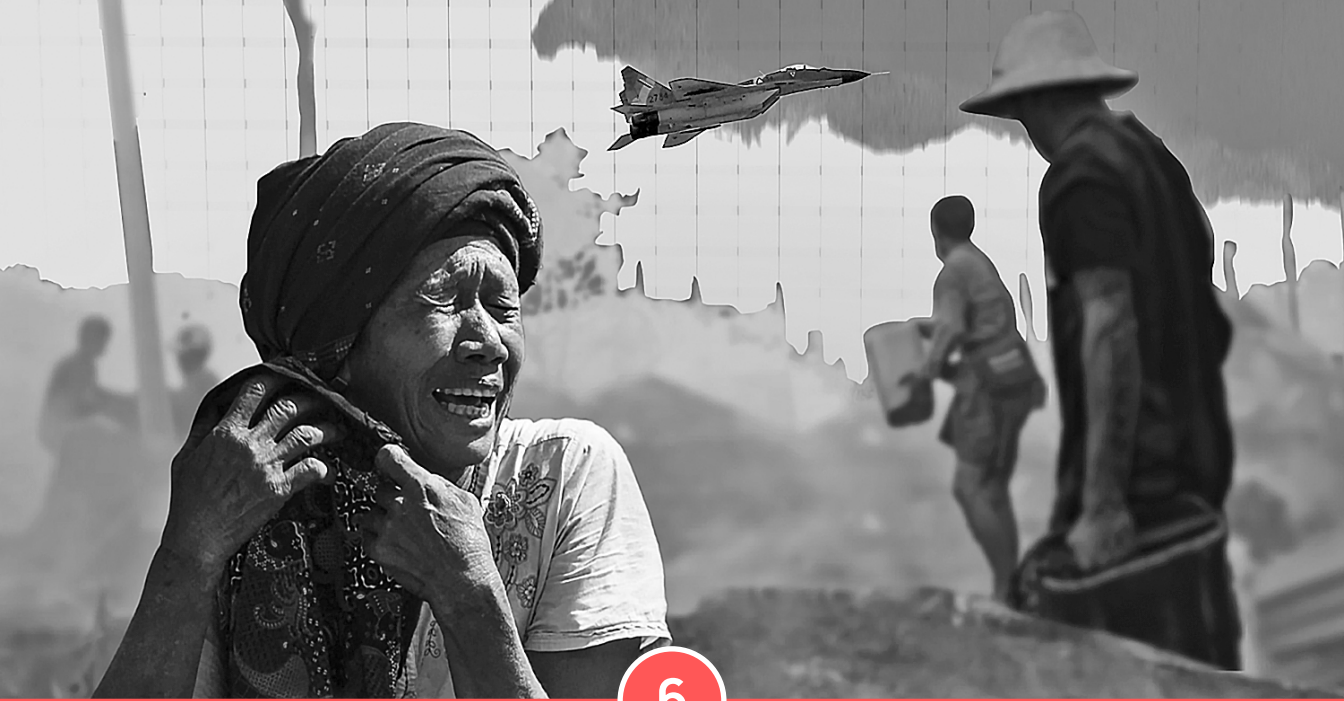
ISP Mapping Number 78

ISP Myanmar

Resistance groups have captured **at least 174 military camps*** operated by the State Administration Council (SAC), with a significant number of these takeovers occurring in Shan and Rakhine States. This includes two Regional Military Commands (RMCs) and **more than 141 military bases**.



The data are based on ISP-Myanmar's research from February 2021 to December 2024. Please note that the data presented may vary from other sources due to differences in methodology and data availability. (*) The military camps include SAC's command headquarters, combat battalions, combat support units, and combat support auxiliary units.

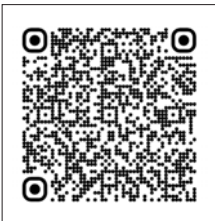


6

Making Data Speak: Capturing Conflicts and Human Security Agenda in Myanmar

In 2024, ISP-Myanmar launched its talk show series, “30 Minutes with the ISP,” hosting six events. The fourth episode, “Making Data Speak: Capturing Conflicts and Human Security Agenda in Myanmar,” drew the largest audiences.

The event convenes ISP-Myanmar’s researchers to unpack their findings and discuss them live with members of the Gabyin Community for 30 minutes. Broadcast weekly by the Democratic Voice of Burma (DVB), these sessions will continue in 2025, featuring a slate of new compelling topics.

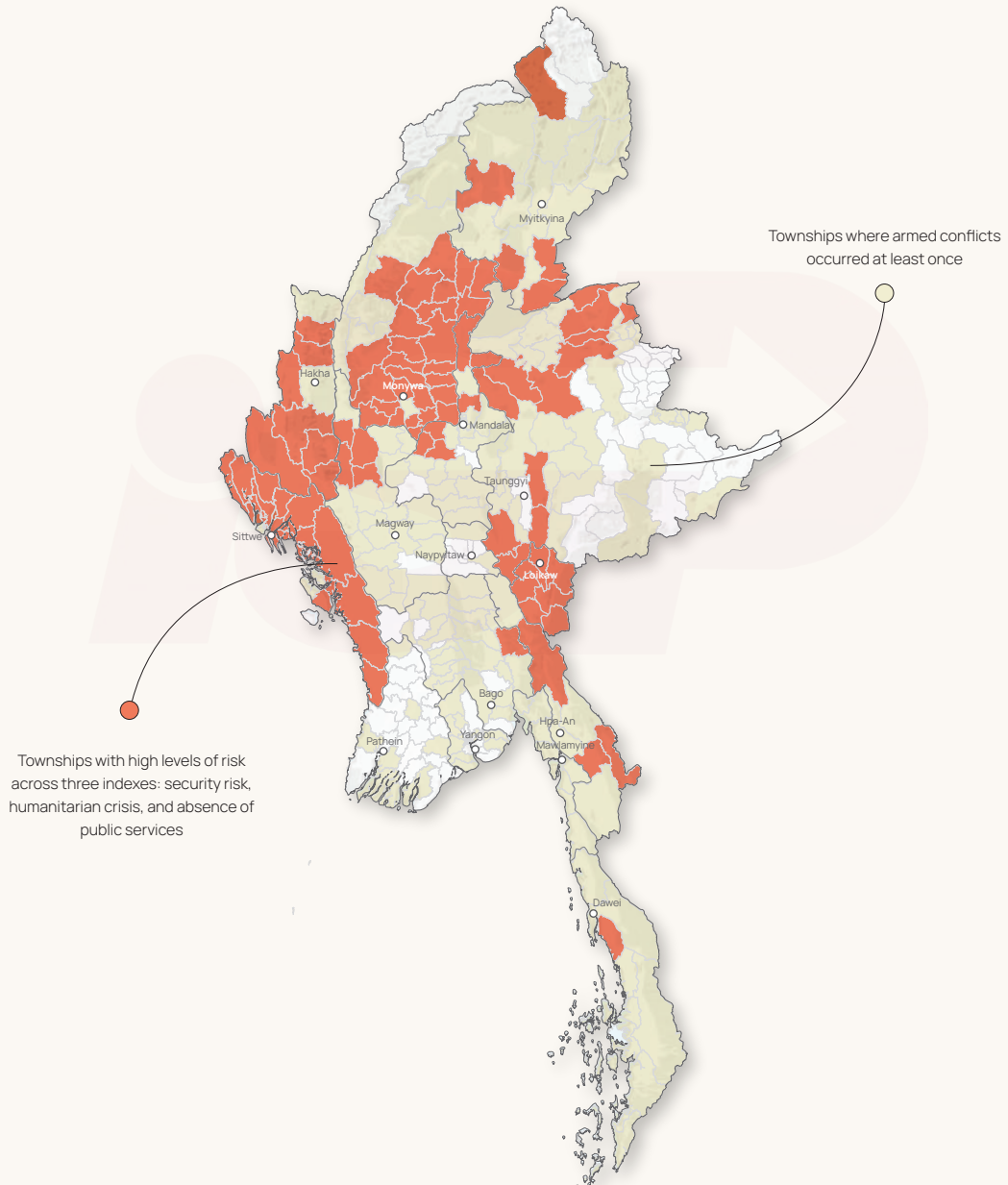


■ Conflict Intensity Index High in Sagaing and Rakhine

ISP Mapping Number 79

ISP Myanmar

ISP-Myanmar conducted a study across **243 conflict-affected townships** using three critical measures: the security risk index, the humanitarian crisis index, and the public service provision absence index. Notably, **87 townships** exhibit alarmingly high intensity across all three indexes.



The data are based on ISP-Myanmar's research findings and only reflect townships where one or more battles occurred from February 2021 to December 2024. Please note that the data presented may vary from other sources due to differences in methodology and data availability.



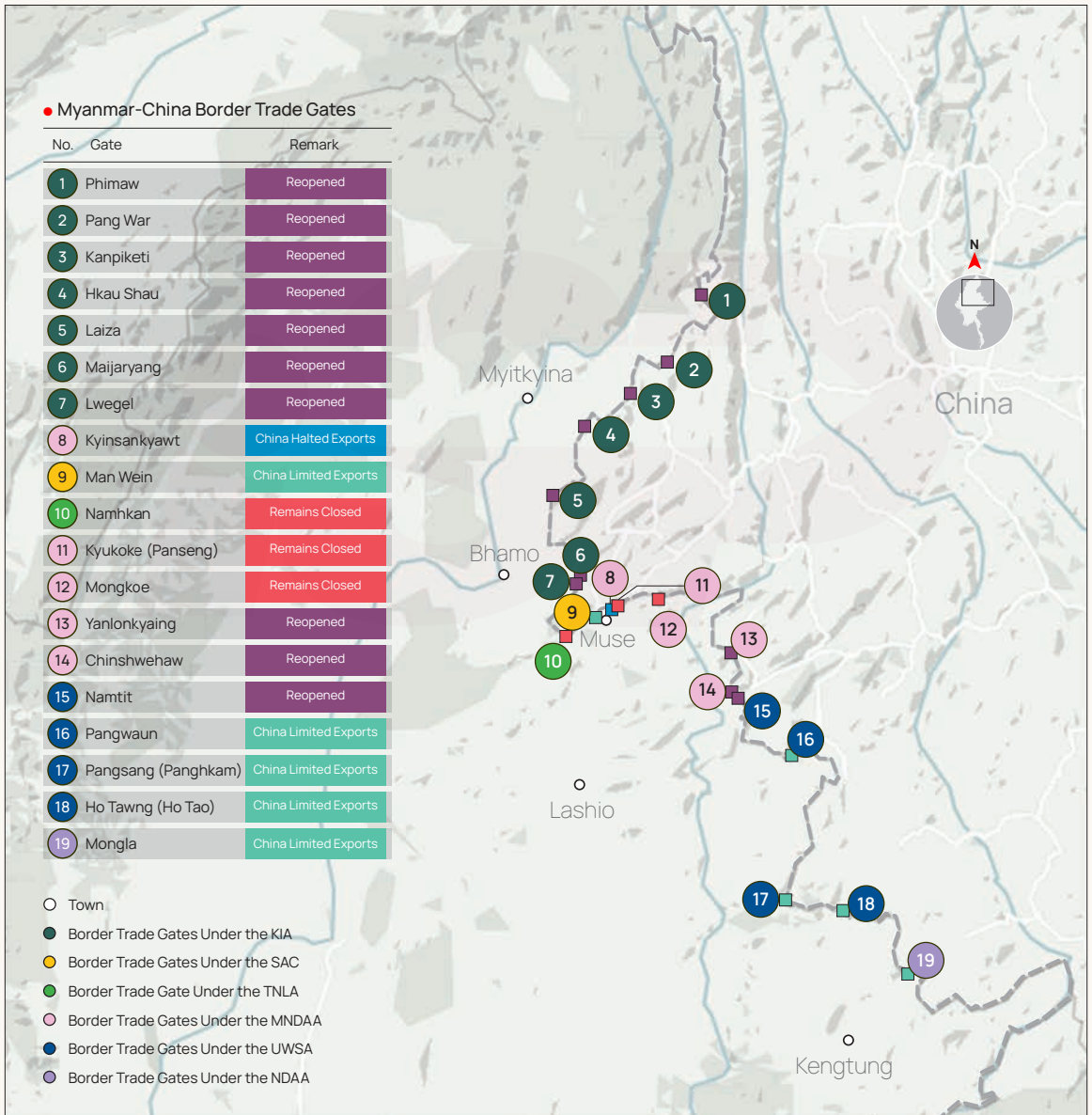
Sanctions With Chinese Characteristics: The Case of Myanmar

In October 2024, China shut down **more than 14** of its border gates along the Myanmar border. At the same time, the EAOs along the Myanmar-China border were pressured by China's "Five Cuts." The junta leader made his first trip to China since the coup. Later, China continued to block only **three border gates**, but the previous border closures significantly impacted the Myanmar populace. Sanctions with Chinese characteristics, different from those of the West, were discussed in the "*30 Minutes with the ISP*" episode five and was one of the most followed issues of 2024.



China Maintains Blockade on Three Border Gates

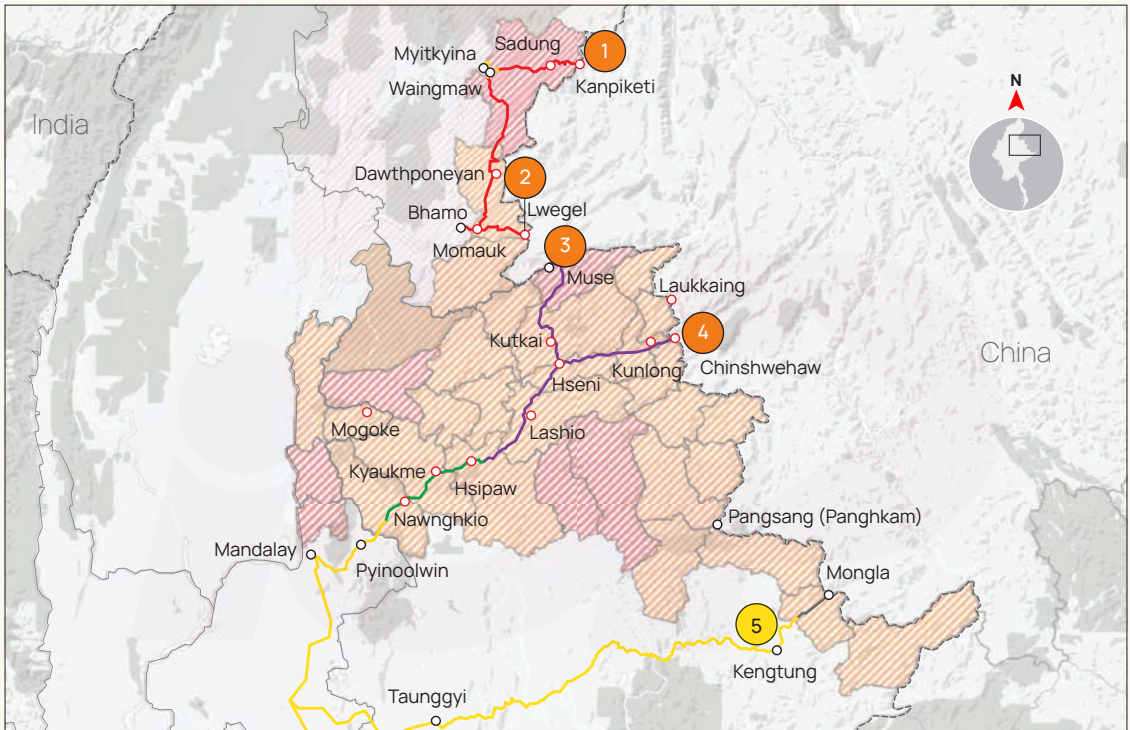
After a ceasefire between the SAC and MNDAA, China reopened three border gates: Yanlonkyaing, Chinshwehaw, and Namtit in the northern Shan State. Out of the **19 border gates** along the Myanmar-China border, China has reopened **six gates** with restrictions in northern and eastern Shan. Meanwhile, **three gates** under the TNLA and MNDAA remain closed.



The data are based on ISP-Myanmar's research findings as of January 21, 2025. Data presented may vary from other sources due to differences in methodology and data availability. This dataset includes national-level border gates, EAOs-controlled gates before the coup, and those captured after Operation 1027.

EOs Control Four Trade Stations on China Border

Ethnic Armed Organizations (EOs) now control **four formal trade stations** from the **five total** along the Myanmar-China border. Since the onset of the coup up to June 2024, these four stations facilitated trade valued at **nearly 10 billion USD**, accounting for **97 percent** of the total cross-border trade between Myanmar and China.



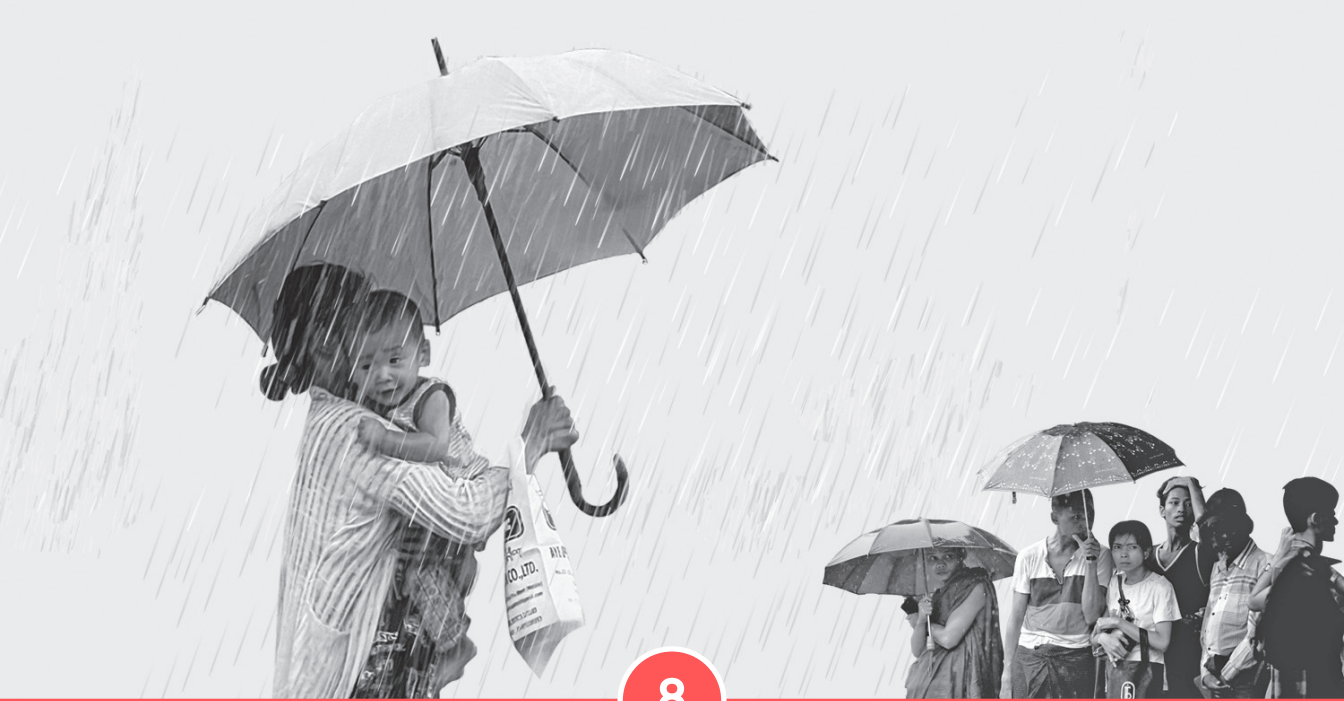
● Border Trade Values at Five Myanmar-China Border Trade Stations

No.	Stations	Trade Value (in USD)	Controlled by
1	Kanpiketi Station	597 Million	KIA
2	Lwegel Station	442 Million	KIA
3	Muse Station	7,621 Million	3BHA
4	Chinshwehaw Station	1,346 Million	MNDAA
5	Kengtung Station	333 Million	SAC

- Town
- Towns seized by EOs
- Roads controlled by SAC
- Roads controlled by KIA
- Roads controlled by 3BHA
- Roads controlled by TNLA
- Roads controlled by NDAA-ESS
- ▨ Areas under EOs complete control
- ▨ Areas under EOs partial control

The data are based on ISP-Myanmar's research findings from February 2021 to June 2024. Data presented may vary from other sources due to differences in methodology and data availability. The MNDAA controls the Kyinsankyawt and Kyukoke (Panseng) gates at the Muse station, while the SAC controls the Man Wein Gyi gate. However, accessing the Man Wein Gyi gate requires passing through the 105-Mile Trade Zone, which the 3BHA controls.





8

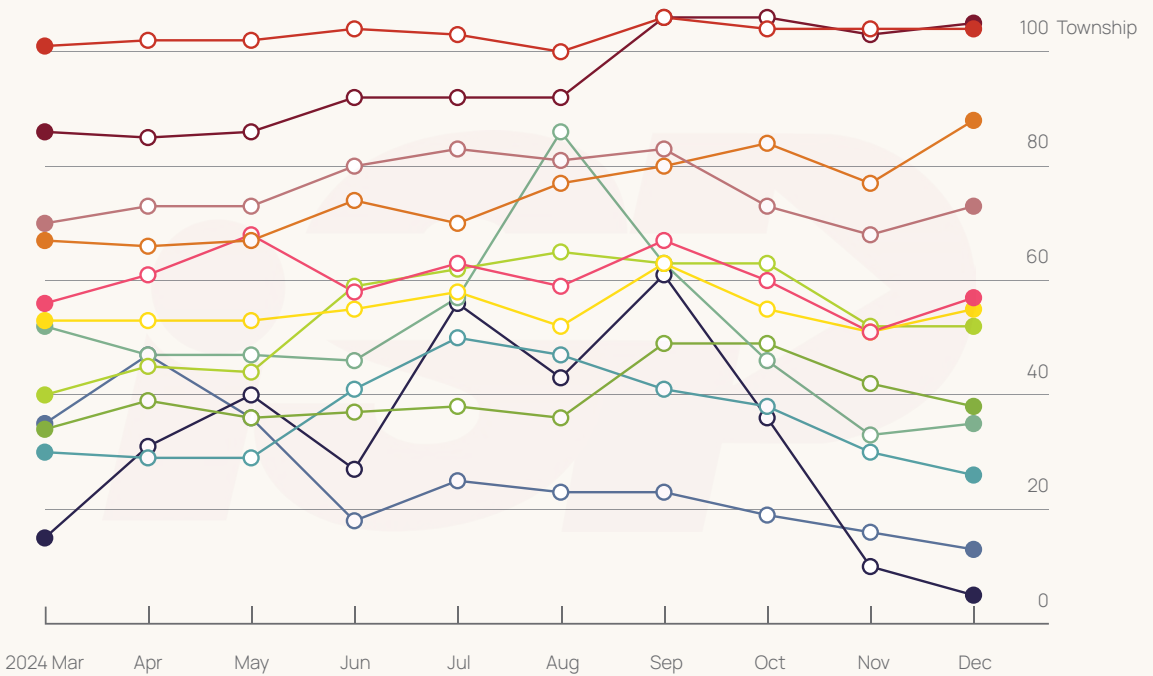
Facing the Tailspin, The Country Shall Fall Upside Down

Through the Research Network Program, ISP-Myanmar conducted studies across more than 110 townships, covering one-third of Myanmar's total townships. This research includes extensive surveys, such as the report *"Facing the Tailspin, The Country Shall Fall Upside Down."* This report delves into the socioeconomic impacts following the enactment of the Conscription Law and emerged as one of the top picks among our audiences in 2024. Additionally, in November 2024, ISP-Myanmar released *"Dual Burdens on Women,"* a survey analysis that sheds light on socioeconomic challenges.



Electricity Outage: Everyday Struggle

In 2024, Myanmar grappled with its most severe challenge yet: severe **electricity outages**. **Psychological insecurity** claimed the second spot in the hierarchy of hardships, closely followed by other grievances, including **transportation difficulties** and **extortion**.



- 1 Electricity outage
- 2 Psychological insecurity
- 3 Transportation difficulties
- 4 Extortion
- 5 Internet outage
- 6 Telephone line outage
- 7 Medical supply shortage
- 8 Fuel shortage
- 9 Refuging from war
- 10 Food supply shortage
- 11 Natural disaster occurrence
- 12 Shortage of drinking water

These data are based on a socioeconomic survey on 110 townships across Myanmar conducted by the Research Network from March to December 2024.

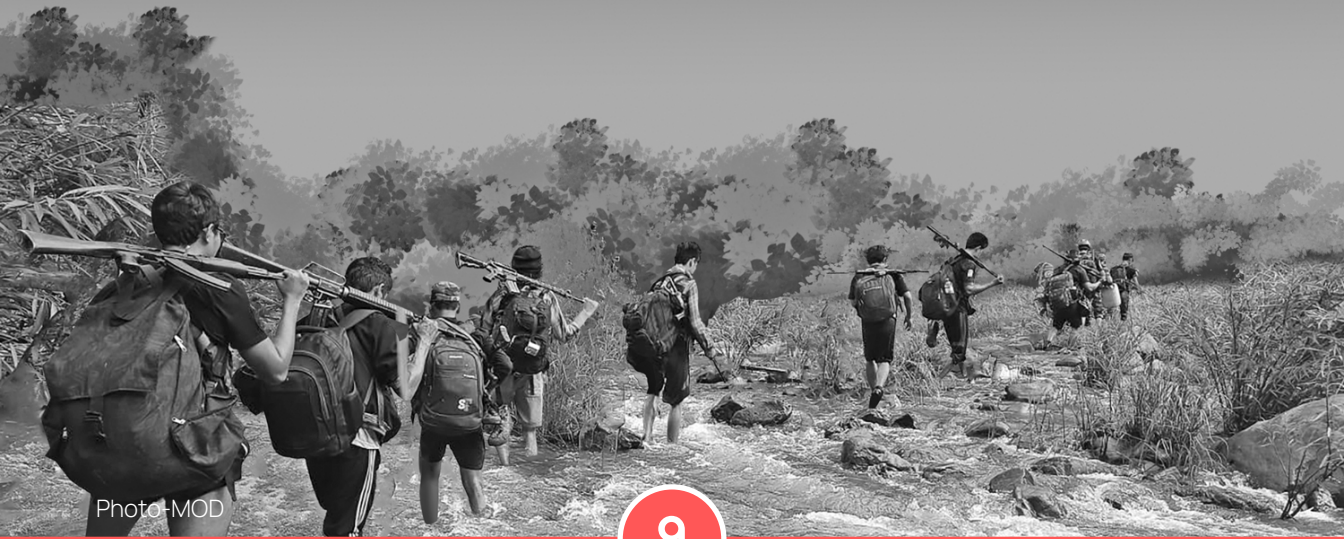


Photo-MOD

9

Future Federal Army

Since the 2021 coup, a proliferation of armed resistance groups has reshaped Myanmar's conflict landscape. ISP-Myanmar's research identifies over **500 such groups**. Meanwhile, SAC's military failures are mounting. The Spring Revolution marked a decisive break from previous ideas, gaining significant momentum **"to permanently dismantle the dictatorship."** This shift narrowed the political space and overshadowed discussions on post-conflict security sector reform (SSR). These evolving dynamics are highlighted in ISP-Myanmar's widely viewed video, **"Future Federal Army."**

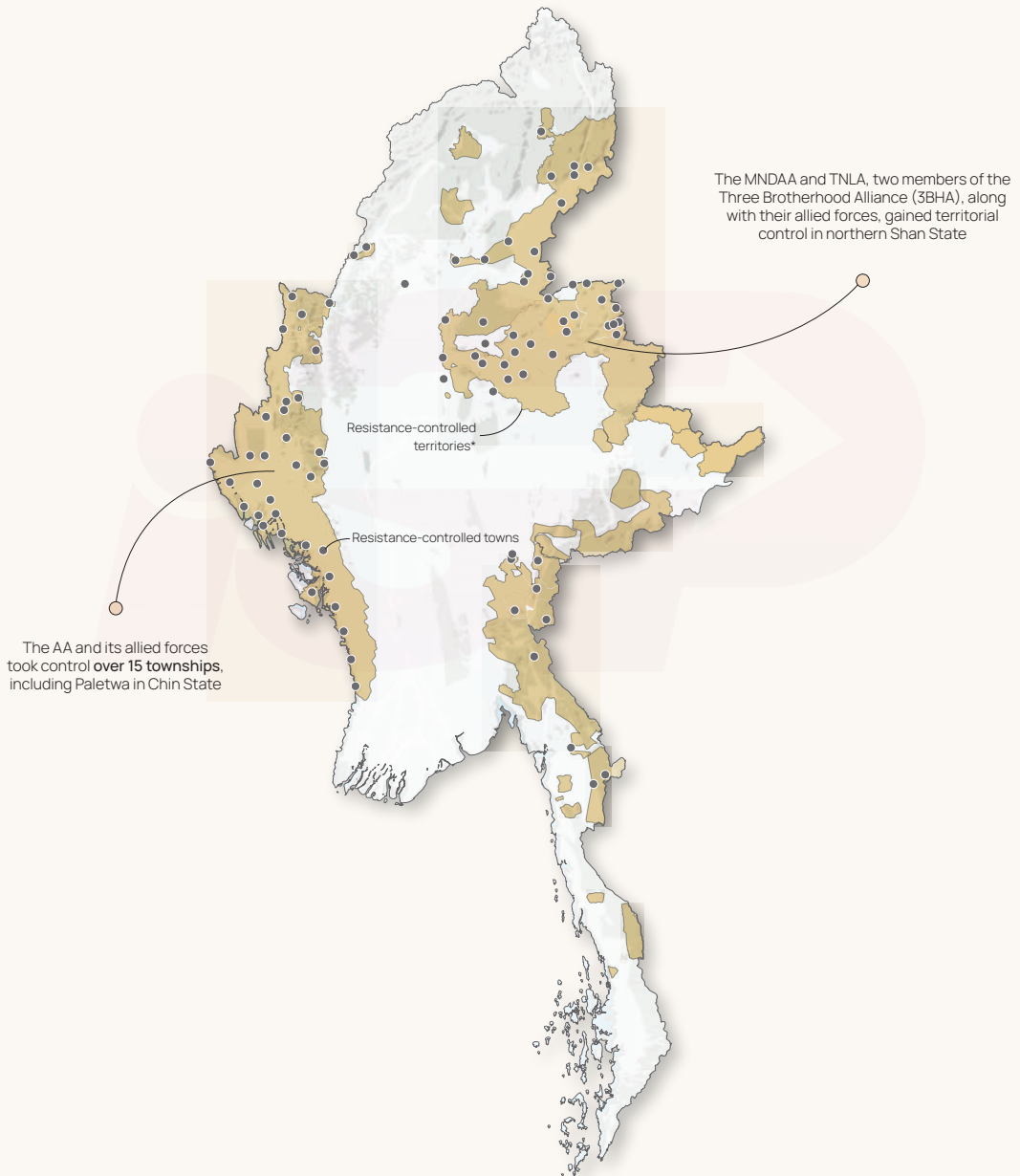


■ Borders Areas Controlled by Resistance

ISP Mapping Number 82

ISP Myanmar

Following Operation 1027, the territorial dynamics along Myanmar's borders have significantly shifted. Ethnic Armed Organizations (EAOs) and resistance groups have effectively expanded their control, overseeing **91 towns** along the periphery.



The data presented here is based on ISP-Myanmar's research as of January 16, 2025. Actual data may vary due to the limitations of data access and potential variations in the methodology employed in the research. (*) Resistance-controlled territory refers to areas where there are no SAC military camps and administration operating. Each EAOs, and PDFs' active and ruled areas are not described in this map.



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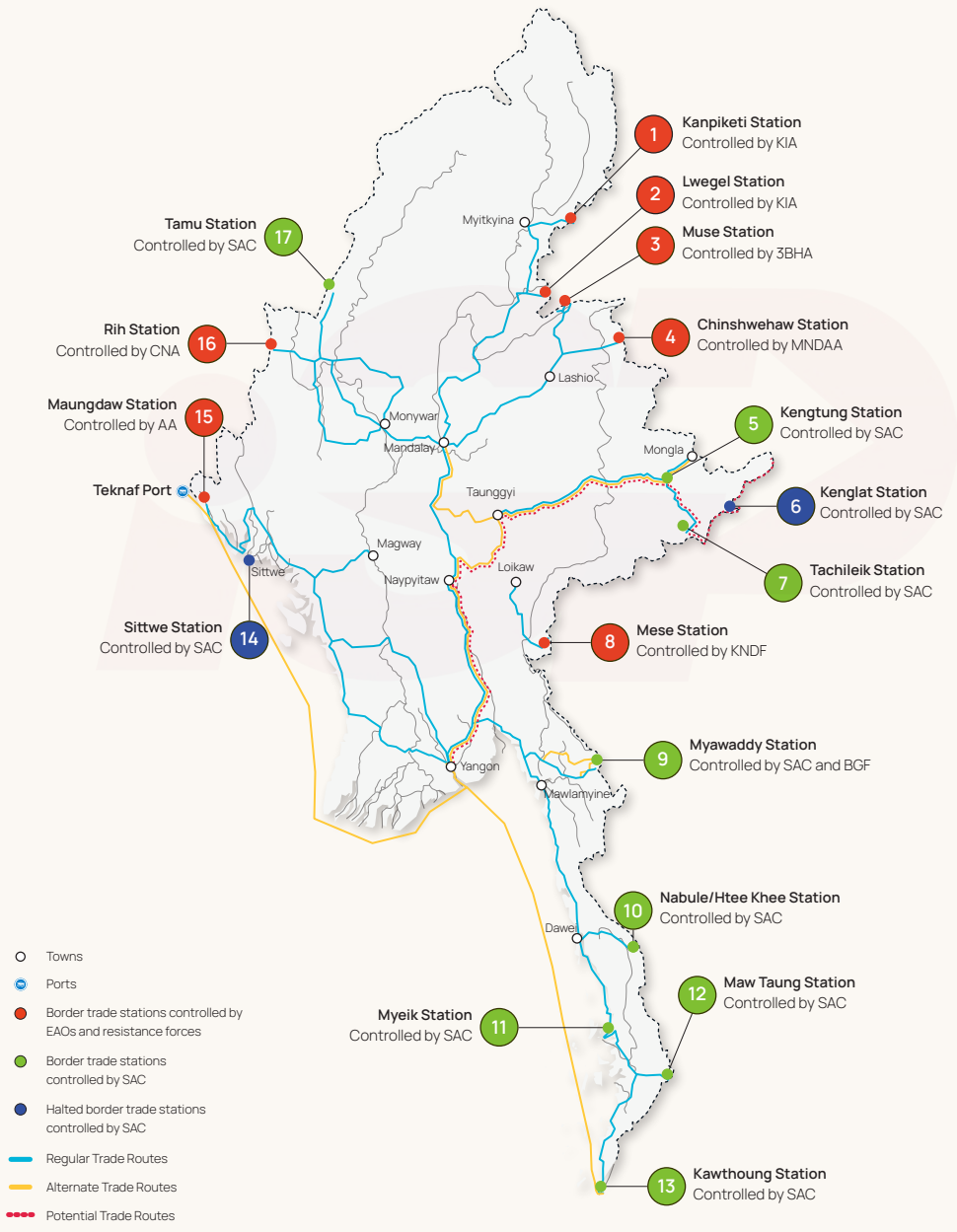
The Political Economy of Myanmar's Conflict

“The Political Economy of Myanmar's Conflict: Analyzing the Pros and Cons of De-escalation Through Economic Incentives,” was also one of the most read pieces. It examined Thailand's initiative to reopen the Asian Highway, a critical conduit for Myanmar-Thailand trade. In this edition of ISP On Point, ISP-Myanmar argued that conflict de-escalation based on the sharing of war dividends among conflict parties may provide temporary respite. However, without progressing to meaningful political negotiations, it could simply delay and worsen the underlying conflict. Without considering the political economy of Myanmar's conflict, a resolution to the crisis is unlikely.



17 Border Trade Stations and Their Conditions

There are a total of 17 border trade stations between Myanmar and neighboring countries. **Seven** of these border trade stations are controlled by Ethnic Armed Organizations (EAOs) and resistance forces.



The data is based on ISP-Myanmar's research as of January 16, 2025. Actual data may vary due to the limitations of data access and potential variations in the methodology employed in the research.

FEEDBACK & FEEDFORWARD

To share your suggestions, inquiries, or thoughts or to engage in open discussions, please contact community@ispmyanmar.com, leave comments on our website, or connect with us directly at +66 80 747 9712. You can also contact us through Signal, WhatsApp, Viber, and Line for secure and open communication.

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