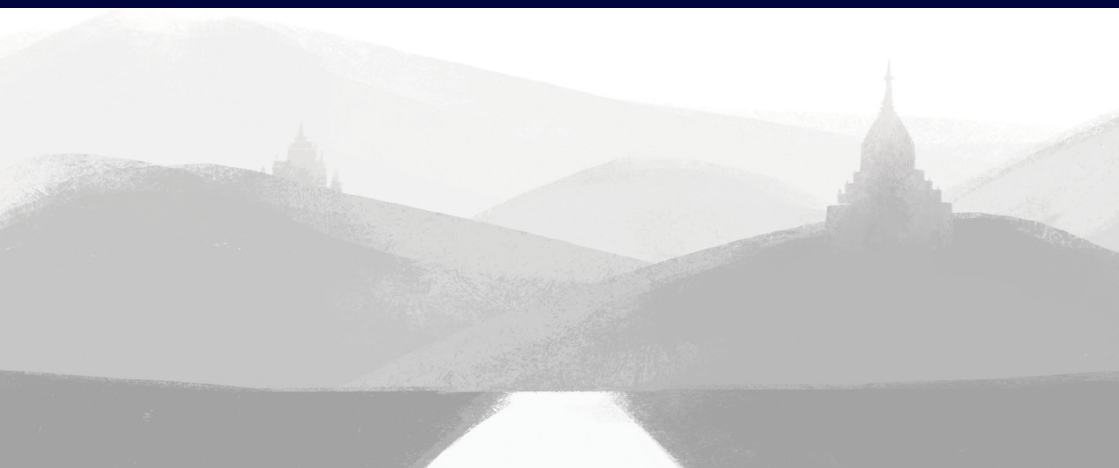


# The Futures of Myanmar

Post-Conflict Scenarios



EDITED BY  
Kai Ostwald  
Htet Thiha Zaw

# THE FUTURES OF MYANMAR

## Post-Conflict Scenarios

Edited by:  
Kai Ostwald  
Htet Thiha Zaw

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# IDRC Foreword

## Betting on the Future: Knowledge as a Pathway to Democracy for Myanmar

The Knowledge for Democracy – Myanmar (K4DM) initiative<sup>1</sup> reflects a profound and enduring belief: that knowledge is not merely an academic pursuit, but a powerful catalyst for social transformation. Funded jointly by Canada’s International Development Research Centre (IDRC) and Global Affairs Canada, K4DM has demonstrated that when young people, scholars, and marginalized communities are equipped with the tools to question, analyze, and envision alternatives, they become architects of positive change. In a country where decades of conflict, exclusion, and political upheaval have constrained democratic space, the initiative has stood as a testament to the idea that ideas, when nurtured, can become instruments of justice, inclusion, and leadership.

Launched in earnest in 2017 and set to close in 2026, K4DM spans two distinct yet interconnected phases. The first focused on strengthening Myanmar’s research ecosystem from within, investing in universities, think tanks, and civil society organizations to enhance evidence-based policymaking and democratic governance. The second phase emerged in response to crisis: following the military takeover in February 2021, the initiative pivoted outward, supporting scholars in exile and across the diaspora while maintaining vital links to communities and networks inside the country. Together, these phases reflect both adaptability and resolve—a commitment to ensuring that knowledge

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1 [Knowledge for Democracy – Myanmar \(K4DM\) Initiative](#), co-funded by Global Affairs Canada and Canada’s International Development Research Centre (IDRC), 2017-2021 (Phase 1) and 2022-26 (Phase 2) with total Funding: CAD10.7 million for 18 projects (Phase 1); CAD8.3 million for 7 projects, working with research partners: 30 (Phase 1) and 16 (Phase 2). Since the launch of the second phase, more than 2000 young scholars have been mentored and trained. Around 248 fellowships have been made available to scholars, of which 60 per cent were offered to women and individuals from ethnic minorities. These fellowships have enabled higher education in countries like Bangladesh, India, Indonesia, Thailand, and Canada.

continues to flow even when democratic institutions are under threat.

Examples abound from the journey of Dr. Ngu Wah Win, who illustrates the transformative potential of this approach. Her engagement with IDRC began even before K4DM formally launched, when she joined a research effort that laid the groundwork for Myanmar's first-ever minimum wage. At the time, she recalls, she did not fully understand the complexities of policymaking or how research could influence national decision-making. Yet by 2015, her work—alongside fellow researchers—helped shape a policy that improved the lives of millions, particularly women employed in the manufacturing and garment sectors. For Ngu Wah, and for many like her, knowledge became both a professional calling and a form of public service.

Since 2017, K4DM has amplified such trajectories by nurturing a new generation of scholars, leaders, and policy thinkers. Fellows have not only conducted rigorous research but also learned how to translate evidence into action—bridging the gap between academic inquiry and the lived realities of communities. This belief in applied knowledge guided the initiative's early focus on parliamentary engagement and governance reform. By strengthening the research capacity of lawmakers and public officials, K4DM helped cultivate a culture of evidence-based decision-making. In Shan State, for example, parliamentarians gained exposure to gender-responsive policymaking, leading to tangible, community-level outcomes. As one young lawmaker noted, the ability to research infrastructure solutions allowed her to identify cost-effective bridge designs that directly benefited her constituency. Such moments underscore how knowledge, when democratized, becomes a tool of everyday leadership.

Education policy and higher education reform were also central to this vision. Decades of underinvestment had left Myanmar's academic institutions struggling to produce independent research or foster critical thinking. K4DM worked to reverse this trend by supporting universities and think tanks, reinforcing the foundations of a scholarly

culture that could sustain democratic aspirations over the long term.

The political rupture of 2021 marked a turning point. Faced with the dismantling of democratic institutions and growing risks for researchers inside the country, K4DM adapted rather than retreated. The second phase emphasized inclusion, diversity, and resilience, extending support to diaspora scholars and displaced communities while preserving intellectual ties to Myanmar. This shift affirmed a deeper principle: that even in exile, knowledge can remain rooted in the struggle for justice and democratic renewal.

Aye Lei Tun's journey reflects this continuity. Initially supported for her work on women in politics, she sought to understand how gender equality movements evolved in the aftermath of the coup and how women continued to engage politically under repression. Through K4DM, she became a doctoral fellow at McMaster University in Canada, contributing to scholarship on gender and media in Myanmar. Her work, including a co-authored chapter in *Putting Women Up: Gender Equality and Politics in Myanmar* (ISEAS, Cambridge Press, 2024), highlights the persistence of structural barriers while amplifying the voices of women who refuse to withdraw from public life. Her research is not only academic—it is an act of documentation, resistance, and hope.

One of the most powerful expressions of K4DM's inclusive vision has been its engagement with the Rohingya community, among the most persecuted and systematically marginalized populations in the world. Beyond displacement and statelessness, the Rohingya have been denied access to education—an erasure that extends into future generations. By supporting Rohingya scholars at the Asian University of Women and in the refugee camps of Cox's Bazar, K4DM invested in a group whose perspectives are often excluded from global discourse.

Research led by fellows such as Mosaddika Mounin and others examined education, health, child marriage, and energy access within the camps, producing insights grounded in lived experience. Mosaddika's team's visual presentation to Camp 16 depicted two

contrasting realities for women pursuing education: one shaped by harassment, fear, and constraint, and the other by aspiration and possibility. This duality captures the essence of K4DM's mission—to acknowledge hardship while insisting on hope as a legitimate and necessary political stance.

The initiative has also elevated voices from borderland and Indigenous communities. Saktum Wonti, an Earthkeeper from Nagaland, has documented the impact of climate change and geopolitical boundaries on tribal life along the Indo-Myanmar border. Her work reveals how imposed borders fracture cultural traditions, restrict mobility, and deepen marginalization. By foregrounding traditional ecological knowledge, her research challenges dominant narratives and broadens the understanding of what sustainable development and democratic inclusion truly mean.

Stories of displacement and resilience further illustrate the far-reaching impact of K4DM. Fellows like John Jonaid and Jaivet Ealom, both Rohingya, transformed personal experiences of exile into platforms for advocacy and leadership. Through internships, policy research, and organizational leadership in Canada, they have brought the realities of refugee life into international policy spaces, advising governments and engaging diasporas. Their journeys underscore how knowledge can travel across borders, carrying with it the aspirations of communities that refuse to be silenced.

Today, more than 240 fellows—most of them women and non-Bamar—form a living network of scholars, advocates, and leaders shaped by the K4DM experience. Their collective work, captured in this volume, is marked by both trepidation and determination. They are acutely aware of the uncertainties facing Myanmar in 2026, yet they continue to map pathways toward a more inclusive and democratic future.

This is where K4DM's deeper significance lies. Even if such an initiative did not exist, it would still be urgently needed. In a country marked by a shortage of vision, representation, and youth



participation, the cultivation of critical thinkers and ethical leaders is not a luxury—it is a necessity. K4DM stands as a Canada-made affirmation that solidarity can take the form of shared knowledge, mentorship, and long-term investment in human potential.

As Myanmar enters another pivotal chapter in its history, the belief that underpins this initiative remains steadfast: that ideas can outlast regimes, that learning can defy borders, and that a new generation—empowered by research, inclusion, and courage—can still dream of, and work toward, a democratic future.

Edgard R. Rodriguez  
Myanmar Lead – Senior Program Specialist  
Asia Regional Office, New Delhi  
International Development Research Centre

# APFC Foreword

Myanmar is living through one of the most profound and uncertain moments in its modern history. Since the 2021 military coup, the country has experienced protracted conflict, institutional collapse, economic dislocation, and deep social fragmentation. Yet alongside devastation, new forms of political and institutional reconfiguration, as well as social resilience, have emerged. In this unsettled landscape, reckoning with Myanmar's future is both difficult and necessary.

This book grows out of the Myanmar Futures project, an effort to move beyond prediction or advocacy alone and instead ask a different set of questions: What futures are plausible for Myanmar? What forces are shaping them? And what choices—by domestic actors and international partners—might shift trajectories over time? Rather than offering a single narrative or prescription, the project adopts a scenario-based approach, recognizing that Myanmar's path forward will likely be uneven, contested, and shaped by interacting political, economic, and social dynamics.

The chapters collected here examine key dimensions of Myanmar's post-coup trajectory, including governance and federalism, economic recovery, digital transformation, identity and social cohesion, institutional reform, civil resistance, and international relations. Each contribution is grounded in empirical realities while remaining attentive to uncertainty. Together, they reflect a core insight of the project: Myanmar's future is not predetermined, but neither is it infinitely malleable. Structural constraints, power asymmetries, and regional geopolitics matter—but so do agency, ideas, and institutional choices.

This volume does not assume an imminent political settlement, nor does it frame transition as linear or inevitable. Instead, it takes seriously the likelihood of prolonged instability, hybrid governance arrangements, and fragmented authority, while also identifying the

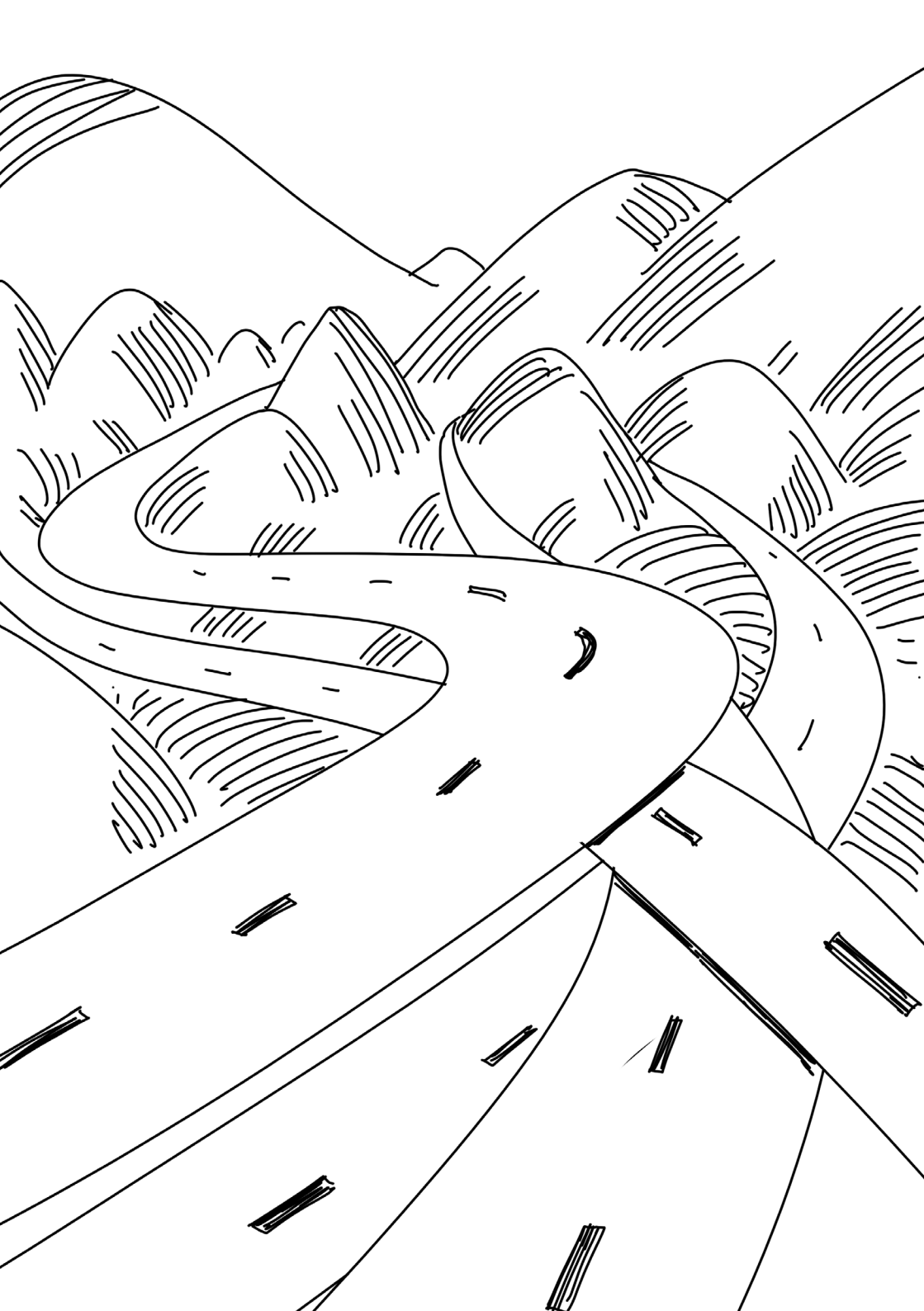
conditions under which more inclusive and sustainable outcomes could emerge.

We hope this book serves multiple audiences. For policymakers and donors, it offers a structured way to think about risk, trade-offs, and medium-term engagement. For researchers and analysts, it provides an integrated framework for understanding how sectoral developments intersect. For Myanmar stakeholders, it seeks to reflect lived realities while situating them within broader regional and global contexts.

We are deeply grateful to this volume's contributors, reviewers, and colleagues whose insights, critiques, and persistence shaped this work. The Myanmar Futures project was made possible through the support of the International Development Research Centre (IDRC), whose commitment to locally grounded, policy-relevant research has been especially vital in contexts of conflict and uncertainty. We are also deeply grateful to the contributors, reviewers, and colleagues whose insights, critiques, and persistence shaped this work.

At a time when Myanmar is too often discussed only in terms of crisis or stalemate, this volume is an invitation to think more carefully about what lies ahead.

Vina Nadjibulla  
Vice-President, Research & Strategy  
Asia Pacific Foundation of Canada



# Introduction: The Futures of Myanmar

Kai Ostwald

Myanmar's decade-long political and economic opening ended abruptly in early 2021 through a coup that reinstated military rule.<sup>1</sup> An unprecedented wave of protests and armed resistance across the country followed. By late 2025, the resulting civil war had killed over 70,000 people, including 8,000 civilians,<sup>2</sup> with an additional 3.6 million internally displaced, making it one of the world's most devastating conflicts and humanitarian crises.<sup>3</sup>

It is unclear as of early 2026 how the civil war in Myanmar will draw down. However, numerous factors—including growing battle fatigue, greater intervention from neighbouring countries, and political repositioning among key stakeholders—are moving the conflict into a new phase that will eventually produce political change in the country. While the timing of such a change cannot be predicted, many examples demonstrate that tipping points can emerge suddenly and leave stakeholders scrambling to formulate appropriate responses.

To understand and facilitate preparedness for such a change, this project assesses potential scenarios in the medium term following the reduction of widespread violence in Myanmar. Each of the chapters in this volume addresses a key domain, namely: the constitution and institutional structures; identity; the civil disobedience movement and the civil service; federalism; civil-military relations; the economy; digital infrastructure; and Myanmar's international relations. In assessing future scenarios, the chapters analyze key

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1 Thuzar, Moe. 2021. Myanmar's state of emergency: Damn the torpedoes. ISEAS Fulcrum. 2021/31.

2 Armed Conflict Location & Event Data (ACLED). 2025. Conflict Data Set. <https://acleddata.com/data/>.

3 UNHCR. January-March 2025. UNHCR Myanmar Situation Regional Update #1. <https://data.unhcr.org/en/documents/details/115905>.

stakeholder interests and implications for outcomes such as peace, democratization, and development. In doing so, they establish reference points to inform decision-making both in anticipation of and following a transition in Myanmar's civil war.

This introduction begins with an overview of Myanmar's recent political developments, then considers how the 2025–26 elections and other variables may shape the trajectory of the conflict. Based on this, it presents four likely scenarios for Myanmar in the years ahead, each marked by varying degrees of fragmentation and institutionalization. The outcomes, ranging from a highly decentralized form of federalism to a failed state, have clear implications for Myanmar's stability, recovery, and democratization, and frame the volume's remaining chapters. The introduction closes with notes on the research approach and the project's limitations.

## Myanmar's Stalled Transition

Following a period of democracy in (then) Burma from 1948–62, the military assumed a central role in the country's politics, exercising harsh authoritarian control for decades. For a variety of reasons, the military opened space for broader political participation beginning in 2011, eventually allowing relatively free and fair elections in 2015.<sup>4</sup> While that resulted in a landslide victory for Aung San Suu Kyi's National League for Democracy (NLD), the military retained extensive powers under the 2008 Constitution, resulting in a *de facto* power-sharing arrangement.<sup>5</sup> Following another landslide NLD victory in the 2020 elections, the military launched a coup that reversed much of the political, social, and economic liberalization of the previous decade.<sup>6</sup>

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4 Hlaing, Kyaw Yin. 2012. Understanding recent political changes in Myanmar. *Contemporary Southeast Asia*. 34(2): 197–216.

5 Ostwald, Kai, and Paul Schuler. 2015. Myanmar's landmark elections: Unresolved questions. *ISEAS Perspective*. 65.

6 Pedersen, Morten B. 2022. Myanmar in 2021: A state torn apart. *Southeast Asian Affairs*.

The coup triggered an unprecedented and transformative response from Myanmar's people.<sup>7</sup> Large-scale protests in its immediate aftermath prompted widespread reckoning with long-fragmented identities across Myanmar. Numerous ethnic armed organizations (EAOs), which are concentrated in ethnic minority areas around the country's periphery, increased co-ordination of their resistance against military rule.<sup>8</sup> In the country's Bamar-majority heartland, newly formed People's Defence Forces (PDFs) likewise challenged the military. Parallel governments comprised of exiled civilian leaders—most notably the National Unity Government (NUG)—sought international recognition and initiated deliberations on new institutional structures, including a long-demanded federal arrangement.<sup>9</sup>

Armed resistance against military rule rapidly escalated into a civil war. Resistance forces achieved significant breakthroughs, especially during the synchronized offensives of Operation 1027 in late 2023, which pushed the military to its most precarious position in decades.<sup>10</sup> By early 2024, the military controlled less than 25 per cent of Myanmar's territory, according to credible estimates, and only a portion of the country's strategically vital border crossings. Moreover, the military appeared to be increasingly factionalized and hampered by low morale, while its senior leadership was isolated internationally, including from regional forums led by the Association of Southeast Asian Nations (ASEAN).<sup>11</sup> Economic decline and the growth of a conflict economy—in which scam centres, unregulated mining, and illicit drug production

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7 Prasse-Freeman, Elliott, and Ko Kabya. 2021. Revolutionary responses to the Myanmar coup. *AT: Anthropology Today*. 37(3): 1-2.

8 Zin, Min. 2021. The real kingmakers of Myanmar. *New York Times*. June 4, 2021.

9 Ostwald, Kai, and Kyaw Yin Hlaing. 2021. Myanmar's pro-democracy movement. *Kyoto Review of Southeast Asia*. 31.

10 Thuzar, Moe, and Romain Caillaud. 2025. Myanmar in 2024: Struggle continues for glimmers of light. *Southeast Asian Affairs*.

11 Lin, Joanne, and Moe Thuzar. 2022. The struggle for international recognition: Myanmar after the 2021 coup. *ISEAS Fulcrum*.

skyrocketed—further fuelled popular resentment against the military.<sup>12</sup>

## The State of Conflict in 2024 and 2025

Key developments in late 2024 and 2025 stalled resistance forces' momentum and partially reversed earlier gains. China was a key factor: concerned with instability along its border, it increased material support to Myanmar's military, while exerting pressure on EAOs along its border to limit the scope of their resistance.<sup>13</sup> Together with ongoing support from Russia, this allowed the military to scale up its use of drones and devastating airstrikes.<sup>14</sup> Moreover, a successful conscription campaign replenished depleted military units while inhibiting resistance recruitment efforts. These factors have allowed the military to regain some of the territory lost in 2023 and 2024.<sup>15</sup> The shifting momentum exacerbated factionalization among the resistance forces.<sup>16</sup>

As of early 2026, it appears highly unlikely that either the military or resistance forces will be able to achieve a decisive victory on the battlefield, leading a number of analyses to describe the conflict as in a stalemate.<sup>17</sup> While localized changes will continue to occur, the broader pattern of territorial control appears fairly stable. In short, the military controls most major cities and garrison towns, significant portions of strategically important roadways, and some rural areas, particularly in the Bamar-majority heartland. Resistance groups

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12 Institute for Strategy and Policy - Myanmar. March 19, 2025. Scam cancer in Myanmar. ISP Recap Memo.

13 Hein, Ye Myo. April 17, 2025. China's double game in Myanmar: How Beijing is manipulating civil conflict to secure regional dominance. Foreign Affairs.

14 McDermott, Gerald. January 15, 2026. How the 'Neo-Authoritarian Bloc' ensured the survival of Myanmar's military junta. The Diplomat.

15 Institute for Strategy and Policy - Myanmar. November 13, 2025. Regime regains 11 percent of lost ground in Northern Shan. ISP Situation Brief.

16 Lynn, Htet Shein. 2025. Military success heightens tensions between Myanmar's ethnic armed organisations. ISEAS Perspective 64.

17 Michaels, Morgan. August 2025. Myanmar's war to nowhere. IISS Myanmar Conflict Map.



control a substantial portion of the country's periphery (which roughly corresponds with the non-Bamar-majority states). Other parts of the country remain openly contested or under the control of EAOs that have neutral or collaborative stances vis-à-vis the military.

Public sentiments and political orientation vary considerably. In the Bamar-majority heartland, the military is widely resented and resisted, aside from limited pockets with close military ties. The picture is more complex around the country's periphery.<sup>18</sup> In some areas, ethnic minority groups remain fiercely opposed to the military; in other areas—particularly among second-order minorities (minorities in ethnic minority areas)—local leaders have pragmatically aligned with the military to secure benefits and a buffer against larger ethnic minority groups in their vicinity.

## **Fragmented Governance**

The absence of a decisive resolution on the battlefield and complex patterns of political support have fragmented Myanmar's governance landscape. The military retains control over the remnants of Myanmar's formal state, particularly in Nay Pyi Taw and Yangon. Through this, it has sustained at least the appearance of functional governance at the international level and in major urban areas. A limited number of countries, most notably China and Russia, effectively recognized the military's main governance vehicle (known as the State Administrative Council (SAC) prior to mid-2025 and the State Security and Peace Commission, or SSPC, after) as Myanmar's government. While ASEAN has explicitly excluded the SAC from regional meetings, it has continued to engage Myanmar's formal state, which the SAC controls.<sup>19</sup> The exiled civilian NUG has no meaningful influence over the Myanmar state and has struggled to secure international recognition.

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<sup>18</sup> Thawngmung, Ardeth, and Khun Noah. 2021. Myanmar's military coup and the elevation of the minority agenda? *Critical Asian Studies*. 53(2): 297-309.

<sup>19</sup> Thuzar, Moe. October 19, 2021. ASEAN snubs the State Administrative Council (for now). ISEAS Fulcrum.

Governance of Myanmar's periphery is again more complex.<sup>20</sup> In large parts of (especially rural) Kachin, Shan, Kayah, Kayin, Mon, Chin, and Rakhine States, EAOs representing local populations have resisted control by the central state since the country's independence. Many of these groups have made unprecedented breakthroughs since the 2021 coup, securing larger territories and consolidating control within them.<sup>21</sup> In several cases, notably in parts of Shan State (under the MNDA, TNLA, UWSA EAOs), Rakhine State (ULA/AA), Kachin State (KIO/KIA), Kayah/Karenni State (KNPP/KA + KNDF), and Kayin/Karen State (KNU), resistance groups have taken innovative steps to institutionalize their self-rule, creating what might best be described as semi-autonomous 'statelets' that carry out many governance functions, including provision of public services, health care, commerce, border control, and security, albeit to varying extents.

This pattern of fragmented governance appears firmly entrenched for the foreseeable future. Specifically, large parts of Myanmar's Bamar-majority heartland will likely be governed by the weak central state, although it will also be subject to ongoing contestation. Many peripheral areas, having fought for greater autonomy for decades, will resist conceding authority to the centre; instead, they will continue to pursue greater autonomy and self-governance, although the degree of institutionalization and control will vary widely. Notably, while subnational institutionalization and autonomy have grown in many peripheral areas, they also remain subject to ongoing attacks by the military, particularly in the form of airstrikes.

## The 2025–26 Election

Several developments could impact this situation through the course of 2026, foremost the junta's multi-phased elections in December

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20 South, Ashley. 2022. A new look at federalism in Myanmar. PeaceRep: The Peace and Conflict Resolution Evidence Platform, Interim Transitions Series.

21 Thawngmung, Ardeth, and Ashley South. March 2025. Revolutionary regimes: Emerging forms of governance in post-coup Myanmar. ISEAS Trends. 4.

2025 and January 2026.<sup>22</sup> The elections were deeply flawed: they excluded major pro-democracy parties, were held only in areas under the military's control, and fell far short of basic legitimacy standards.<sup>23</sup> Their timing also raised concerns, as elections held during wartime conditions typically catalyse additional violence and further entrench political divisions. Given these factors, it is improbable that the elections will provide a pathway towards democratization and stability. The election's proponents note two pathways—albeit ones that are low-probability—that could shift the political equilibrium. First, they could conceivably disperse power away from the military's inner core and expand the opening for political reconciliation in the future. Second, they could activate divisions within the military and its aligned political forces, thereby precipitating factional splits that alter their leadership structures and likewise expand the opening for political dialogue.

The elections may also alter the posture of external actors. Even if much of the international community continues to dismiss the elections as a sham, countries such as China and Russia—and the United States under the administration of Donald Trump—have cast them as a meaningful step towards political normalization. This aligns with the junta's strategy, which hopes that the façade of post-election civilian rule will increase the junta's legitimacy, thereby reducing international pressure and isolation.

## Looking Ahead

In short, some dispersion of power, another unforeseen major event, or simply battlefield fatigue will eventually shift Myanmar away from the sustained high-intensity fighting that has defined the post-coup years. That does not necessarily mean a full cessation of violence, but rather a state in which reduced conflict creates space for negotiated

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22 Myanmar Studies Programme. 2025. Myanmar's 2025 election: Rhetoric and realities. ISEAS Fulcrum. 2025/403.

23 Ostwald, Kai. 2025, September 3. Myanmar's wartime polls: Managing expectations. ISEAS Fulcrum. 2025/281.

settlements and new political equilibria. What could Myanmar look like as it transitions into such a post-conflict state, whenever and however that occurs?

In nearly all foreseeable scenarios, Myanmar will have a high degree of political fragmentation. There is, however, conceivable variation along two dimensions.

The first dimension is the degree of centre-periphery co-ordination. Any form of central authority will face a trust deficit in the country's periphery. The degree of that deficit is positively correlated with the military's presence in the central government (meaning greater military presence increases the trust deficit), but even a civilian government will face obstacles that reflect the broader mistrust that many ethnic minority groups have of the majority Bamar population, which will always form the largest single group in government. Thus, even under best-case conditions, there are significant challenges facing centre-periphery co-ordination. Under the least conducive conditions, with the military retaining a dominant role in the central government, many subnational units may outright refuse to recognize any central authority at all, strongly suppressing meaningful centre-periphery co-ordination.

The second dimension of variation is the degree of subnational institutionalization. Under supportive circumstances, including external aid and training, many subnational units could establish or further entrench effective self-governing institutions, thereby providing a measure of social support to their populations and limiting the pernicious effects of conflict and the war economy. It is also conceivable, however, that institutionalization of subnational units grows weaker if leadership positions are captured by combatants and the war economy crowds out more sustainable economic structures, leaving the populations exposed to significant hardships.

The degree of subnational institutionalization is also conditional on the relationships between and within Myanmar's many ethnic minority groups. At present, persistent intercommunal tensions

strain those relationships. The violence between ethnic Rakhine and Rohingya in Rakhine State is perhaps the most visible example, but there are numerous others across the country.<sup>24</sup> Some are clearly *intercommunal* in nature, such as the conflicts over territorial control between different EAOs in Shan State and Kachin State. In other cases, the tensions are *intra*communal, such as in Karen State, where the Karen National Liberation Army (KNLA) has been in fierce conflict with junta-aligned Karen groups, including the Karen Border Guard Force and the Democratic Karen Benevolent Army.<sup>25</sup> The military has proactively sought to deepen these tensions, including by offering significant inducements to groups that align with them. The election also sharpened animosities between groups that refused or resisted participation and those that participated more openly, with the latter frequently framed as junta collaborators. This has clear implications: continued communal tensions not only inhibit effective co-ordination between resistance groups, but divert resources and attention away from institutionalizing subnational governance structures.

**Table 1:** Four Variants of Post-conflict Myanmar, Varying by (a) Degree of Centre-Periphery coordination, and (b) Degree of Institutionalization in Subnational Units.

		Subnational Institutionalization	
		High	Low
Centre-Periphery Co-ordination	Limited	form of highly decentralized federalism	unstable, crony federalism
	Non-existent	weak centre surrounded by quasi-autonomous statelets; contestation for int'l legitimacy	danger of a failed state

24 Michaels, Morgan. May 2024. Threat of communal violence grows in western and central Myanmar. IISS Myanmar Conflict Map.

25 Brenner, David. 2025. Rebel politics after the coup: Ethnic armed organisations and Myanmar’s Spring Revolution. Journal of Contemporary Asia.

## Democratization

The prospects for meaningful democratization are limited across all four foreseeable variants of post-conflict Myanmar. Several factors make a repeat of the partial, top-down transition that occurred between 2011 and 2015 unlikely, given the strong contrasts between then and now. The military's brutal actions since the onset of the civil war in 2021 have pushed levels of animosity and mistrust against them to levels well beyond those in 2010. The fresh injection of senior military personnel into the USDP prior to the election has also strengthened the perception that the party has little meaningful autonomy from the military. Whereas some in the USDP showed signs of reformist tendencies in 2010, those are all but absent 15 years later. More fundamental is the basic reality that the military already secured an arguably ideal position between 2015 and 2020, which included full autonomy from civilian institutions and extensive control of the economy, together with significant insulation from criticism for governance failures. If even this 'best of both worlds' arrangement was insufficient to keep the military in the barracks, it is difficult to imagine it initiating any new arrangements that have meaningful democratic elements.

Democratization from below faces substantial obstacles as well, not least because the military will likely remain a central political actor for the foreseeable future. While the NUG has articulated a vision for a democratic future in Myanmar, it has struggled to secure support among both resistance actors and the international community, making it difficult to foresee a pathway in which it leads a co-ordinated, bottom-up democratization process. Notably, the junta has designated the NUG and numerous EAOs and PDFs as "terrorist organizations," which suggests limited political space for them so long as the military remains a dominant veto player.<sup>26</sup>

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26 Thida and Kyi Sin. 2023. Who decides the cessation of violence in Myanmar? A grinding battle for control. ISEAS Fulcrum. 2023/250.

Subnational actors also vary on the question of democracy. While many EAOs are united in seeking to end the military's role in politics, there is no unified vision of a post-conflict political order, let alone a democratic one. Some, including the KNU, Chin National Front, and Karenni National Progressive Party, explicitly reference a federal democratic project as an end goal, while others, such as the Arakan Army, Ta'ang National Liberation Army, and United Wa State Army, emphasize autonomy but reveal little that suggests a move away from armed party dominance in the foreseeable future.

There is no question that countless individuals in Myanmar remain deeply committed to an inclusive democratic future for their country and continue to make immense sacrifices in pursuit of it. From the perspective of early 2026, however, there are no obvious pathways or vehicles through which that future might be realized. The struggle will nonetheless continue, regardless of whether the international community provides the country's democratic champions the ongoing support they deserve.

## **Reading the Chapters**

This volume contains eight chapters that examine potential scenarios in key areas following the cessation of large-scale violence in Myanmar. They focus on the medium term, roughly defined as six to 36 months into a post-conflict state. The logic is simple: the immediate aftermath of many transitions is chaotic and focused on political consolidation, rather than systematic institution building. The international community should plan for this day-after phase in Myanmar, but other priorities, including addressing humanitarian needs, preventing conflict flare-ups, and assisting displaced communities, will take precedence. By contrast, over the distant long-term, nearly anything is possible, limiting the utility of planning in some domains.

The chapters are designed to provide compact and accessible overviews of key domains. They begin with the contextual backdrop,

highlighting historical challenges and the importance of the domain at hand for outcomes such as peace, democratization, and development. They then review the two to three most likely scenarios for that domain in a post-conflict environment, focusing on relative likelihoods as well as implications for key stakeholders and outcomes. They close by considering major questions and unknowns to help readers navigate the developments of the coming months and years.

The team comprises a group of emerging Myanmar scholars and leaders based mainly in Canada and Southeast Asia. All have been part of the University of British Columbia's Myanmar Initiative, which was enabled by support from the International Development Research Centre's Knowledge for Democracy Myanmar (K4DM) Initiative. The research evolved through workshops at the University of British Columbia, the University of Toronto, York University, Mahidol University, and Chiang Mai University. The Asia Pacific Foundation of Canada provided support at each stage, particularly in finalizing the manuscript.

This first chapter, by Isaac San, examines how constitutional and electoral frameworks could facilitate civilian rule or preserve military vetoes. The most likely scenario sees the military consolidating institutional control, using constitutional change and electoral engineering to further entrench its role in politics. Calvin San (Chapter 2) examines identity and grassroots relations after 2021. He suggests that future integration will likely be uneven and local, with a unifying national identity remaining weak and broader cross-country integration least likely.

Hsu Myat Yadanar Thein (Chapter 3) traces the Civil Disobedience Movement from mass non-co-operation into parallel services and underground administration. Hybrid reintegration is most likely over the medium term, while prolonged military dominance would lock key professionals and civil servants into exclusion and drain state capacity further. Dr. Sai Kyi Zin Soe and Ngwe Min Tar Yar (Chapter 4) argue that Myanmar's federal trajectory will be driven less by formal



bargains than by territorial fragmentation, entrenched coercive power, and contested legitimacy at the centre. The most plausible outcome is unstable “crony federalism” alongside quasi-autonomous peripheries, while a negotiated move toward a coherent federal settlement remains least likely.

Nay Yan Oo (Chapter 5) assesses civil–military relations under post-coup fragmentation. The most likely configuration sees the military consolidate control of the central state, while EAOs control significant parts of the periphery. Civil-military relations in Myanmar are unique, in that there are complex relations between the EAOs and the civilian populations in areas under their control. Ngu Wah Win (Chapter 6) argues that the economy has split between a shrinking SAC-managed system and an expanding conflict economy, which has intensified instability and vulnerability. She maps outcomes from collapse through prolonged instability to slow recovery, stressing that even modest recovery depends on macro-stabilization, restored trade and finance channels, and some political stabilization and external engagement.

Bradley Freeman (Chapter 7) situates Myanmar’s digital trajectory between ASEAN’s regional integration agenda and the junta’s deepening digital authoritarianism. The most likely scenario is prolonged marginalization from regional digital integration, with reintegration contingent on both political conditions and implementation capacity. Napas Thein (Chapter 8) traces how the conflict is remaking Myanmar’s international relations, outlining fragmentation, isolationism, and internationalization as competing trajectories. He judges fragmentation as most likely, with the junta, NUG, and EAOs cultivating divergent external ties, complicating co-ordination on aid, trade, and security, and raising the risk of spillover effects. The volume closes with a conclusion by Dr. Htet Thiha Zaw, who draws out broader observations and looks further into the future.

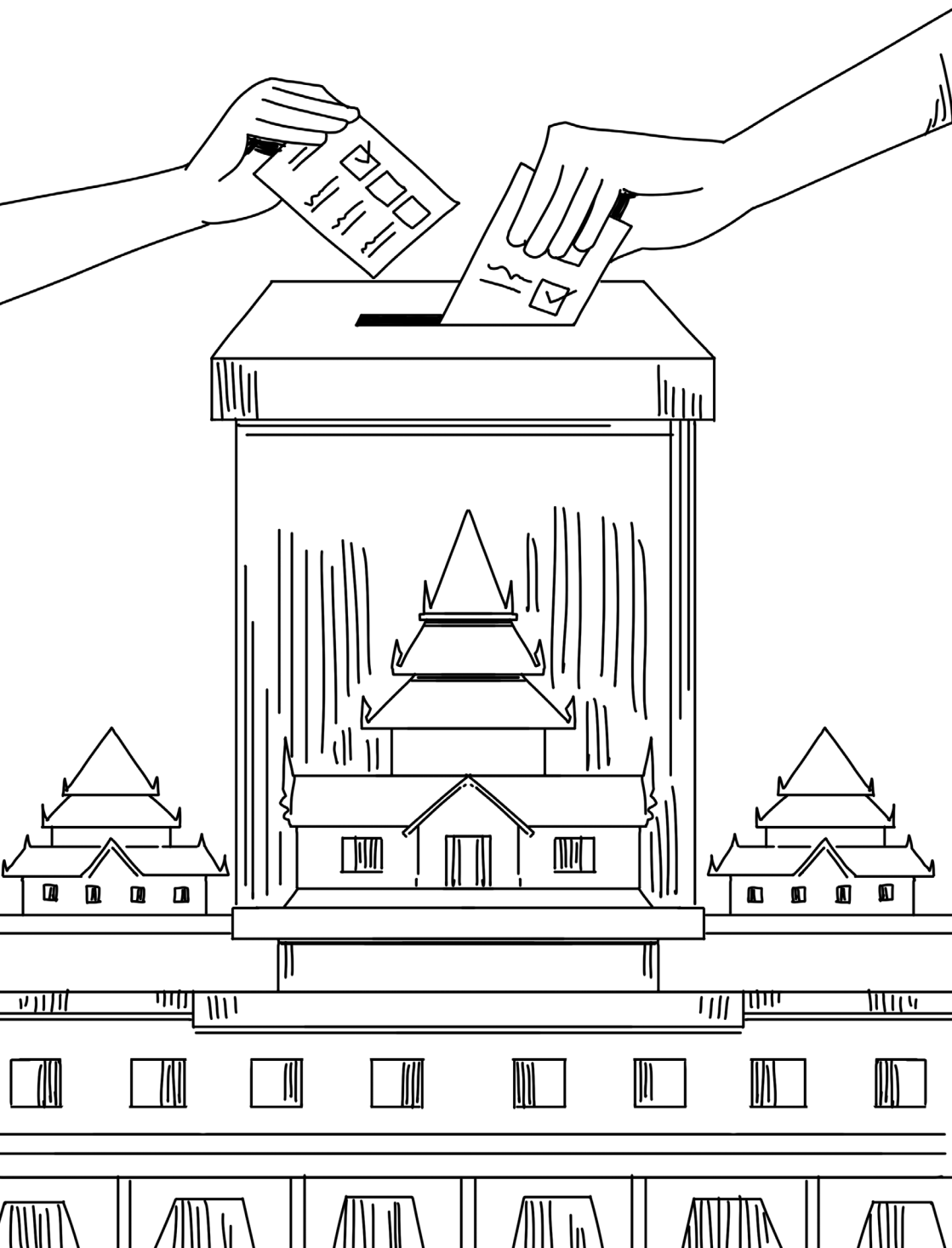
## Limitations

The project has several notable limitations. Critically, the future is inherently unknowable, so we are not making predictions about what will happen in Myanmar. Rather, we have used the best information available to the team as of late 2025 to make analytic assessments about the various possibilities in a post-conflict Myanmar. As Bangladesh and Nepal have most recently demonstrated, tipping points can materialize abruptly; given the aforementioned factors in Myanmar, there is a real possibility that some form of transition out of acute civil war will occur in the foreseeable future. The longer the civil war continues, however, the more uncertainty is introduced around the scenarios and their relative likelihoods.

As noted earlier, the post-conflict state we focus on does not mean no conflict. Given the long history of centre-periphery tensions in Myanmar, the intensity of the civil war, and the abundance of arms throughout the country, a complete cessation of violence is highly unlikely in the foreseeable future. To the contrary, it is almost certain that regular conflict involving a subset of armed groups will continue even after a significant transition out of acute civil war, as will sporadic clashes throughout the country. This makes identifying the start of “post-conflict” Myanmar challenging. In retrospect, however, there will be a phase in which the breadth of violence that has defined the period since the 2021 coup subsides and creates greater space for political, rather than armed, confrontation. That is the state these analyses focus on.

In this volume, the research team sought to cover domains critical to Myanmar’s future, but other key areas remain unaddressed. That includes gender relations, natural resources, land access, internally displaced persons and refugees, public health, education, and transitional justice, among others. This reflects practical constraints, rather than these topics’ importance, and we hope to address these and other domains in future volumes.

Finally, the objective of our analyses is to assess what *could* happen, rather than to advocate for what we believe *should* happen. Clearly, some of the scenarios are significantly more desirable for the great majority of Myanmar's people than others, but we deliberately avoided focusing on advocacy to maintain clear-eyed assessments about the relative likelihoods of different scenarios and their implications for key outcomes of interest.



# Chapter 1: Institutional Reforms

Isaac San

## Summary

Institutional reform in post-conflict Myanmar could take three distinct and plausible forms, each redefining the country's military-dominated constitution and electoral framework. The scenarios are military consolidation (preserving core military power with minimal change), negotiated compromise (gradual reduction of military influence and modest ethnic autonomy), and comprehensive overhaul (dismantling military power for a new federal, democratic order). These scenarios are discussed below, in order of most to least likely.

## Context

Myanmar's protracted conflicts are rooted in political institutions that have consistently reinforced military dominance since the country secured independence in 1948.<sup>1</sup> This exclusionary pattern was formalized in the 2008 Constitution, which ensures the military's supremacy and obstructs democratic oversight. Key provisions guarantee the military 25 per cent of parliamentary seats, enough to veto any constitutional amendment, and grant it control over crucial ministries such as Defence, Home Affairs, and Border Affairs. This rigid, centralized design sidelines ethnic minority demands for a genuine federal system, exacerbating already significant centre-periphery tensions.

The electoral system compounds exclusion. Myanmar's first-past-the-post (FPTP) system has historically favoured dominant Bamar-

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1 Lian, Zaceu. 2012. Institutional design for divided societies: A blue-print for a multi-ethnic Burma. Chiang Mai, Thailand: The Burma Centre for Ethnic Studies. <https://www.burmalibrary.org/en/institutional-design-for-divided-societies-a-blue-print-for-a-multi-ethnic-burma>.

majority parties, such as the National League for Democracy (NLD) and the military-backed Union Solidarity and Development Party (USDP). This majoritarian mechanism disproportionately inflates winning-party seat totals, which, while strengthening civilian power in 2015 and 2020, marginalized ethnic minority parties and increased political polarization. The FPTP system thus reinforces centralization in a deeply divided society.

The 2021 coup has reignited demands for a comprehensive institutional overhaul. Anti-junta forces, including the National Unity Government (NUG) and Ethnic Revolutionary Organizations (EROs), now advocate for a new framework based on federalism, civilian supremacy, and decentralization. Many EROs are already establishing alternative governance structures in their territories.<sup>2</sup>

This analysis focuses on transforming the constitution and the electoral system, as they are the core structures governing power distribution and legitimacy. Without foundational reform, any political transition risks repeating the decades-long cycle of exclusion and authoritarian control. Sustainable peace requires a more inclusive system that recognizes ethnic diversity, decentralizes authority, and guarantees fair representation, although reaching consensus among competing actors, especially the military and the anti-junta coalition, remains highly contested.

## Scenarios

This analysis assesses three potential scenarios for institutional reform in Myanmar, listed in order of likelihood below. The first envisions limited change, with the 2008 Constitution remaining largely intact and military power preserved. The second considers moderate reform through negotiated compromise, resulting in gradual political adjustments. The third explores a comprehensive overhaul

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2 South, Ashley. December 2021. Toward “emergent federalism” in post-coup Myanmar. *Contemporary Southeast Asia: A Journal of International and Strategic Affairs*. 43: 3: 439-460.

led by pro-democracy and ethnic actors. Each of these scenarios presents different ways to address the country's deep-rooted political challenges, but all will influence the country's future stability, inclusivity, and governance.

**Scenario 1 (Military Consolidation with Minimal Reform):** The military consolidates institutional control, maintaining the 2008 Constitution with only minor amendments. Crucial provisions are preserved, including the military's guaranteed 25 per cent of parliamentary seats and control over key ministries. The State Administration Council (SAC) proposes a mixed FPTP/PR electoral system, widely seen as a tactic to dilute pro-democracy power after dissolving over 40 opposition parties.

**Scenario 2 (Negotiated Compromise and Incremental Reform):** A military stalemate or shifting international pressure forces negotiations between the military and anti-junta actors who recognize that neither can secure outright victory. The constitutional framework is revised to reduce the military's political grip, potentially cutting reserved seats and relinquishing non-security affairs, while guaranteeing its core interests in defence and the economy.

**Scenario 3 (Comprehensive Overhaul Led by Anti-Junta Forces):** A full institutional transformation is driven by a decisive shift in the balance of power toward anti-junta forces. This outcome is propelled by significant military defeats, forcing the junta's retreat from the political arena, or by other factors such as a change in support from external actors like China. This shift in power allows anti-junta forces to rewrite the constitution on their own terms, aiming for a complete political reset rather than compromise.

## Analysis

**Scenario 1, military consolidation with minimal reform,** is currently highly likely due to the military's institutional control, a divided opposition, and limited external pressure, although its long-term stability is uncertain. The military would view this as essential for continuity, but ethnic stakeholders would reject it as a form of continued exclusion, potentially leading to persistent grievances and resistance from emerging subnational governments. The implications are democratic backsliding, a shallow façade of stability in military-controlled areas, and a failure to achieve genuine peace or inclusive development, perpetuating the fundamental structural issues responsible for decades of conflict in Myanmar.

**Scenario 2, negotiated compromise and incremental reform,** is moderately plausible. In this scenario, anti-junta forces push for democratic accountability and electoral reform, aiming to shift the military-dominated parliament toward a more diverse and inclusive system. Ethnic groups exercise greater control over areas such as education and taxation, although the degree of power-sharing varies, and some, like the Arakan Army, seek greater autonomy. This path is possible only if the military were to suffer significant setbacks, whether on the battlefield, to internal cohesion, or from international pressure, none of which appear likely at the moment. Should this occur, however, this pathway offers a step toward a more pluralistic order, albeit one with persistent fragility, as stability depends entirely on sustained trust and political will.

**Scenario 3, comprehensive overhaul led by anti-junta forces,** the least likely scenario, is defined by the removal of all military political influence and the establishment of a decentralized, democratic system where reserved parliamentary seats are abolished and civilian oversight is institutionalized. This pathway would materialize only with the complete collapse of the military; at present, it is difficult to envision how this might occur. Even if it did, myriad challenges would remain. Anti-junta stakeholders, for example, bring diverse priorities:



while the NUG supports a federal union, powerful EROs prioritize de facto autonomy or a confederation, evidenced by groups like the Arakan Army.<sup>3</sup> This disparity risks institutional fragmentation into a loose patchwork of autonomous regions. Achieving this ambitious goal requires not only military collapse but deep, unified consensus among historically cautious anti-junta actors.

## Changing Dynamics

The likelihood of each scenario shifts based on battlefield outcomes and political actions. Scenario 1 (consolidation) becomes more likely if the military firmly controls urban centres and strategic infrastructure, as well as regains even partial international recognition in the aftermath of the 2025/26 elections. Scenario 2 (compromise) becomes more likely with military setbacks and a prolonged stalemate, signaled by elite defections within the military or active international brokering of dialogue. Finally, Scenario 3 (overhaul) is conceivable only if the military loses major cities and key regions, alongside the visible emergence of functioning, parallel governance institutions and the proliferation of locally drafted constitutions by anti-junta forces.

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3 International Crisis Group. 2024. Ethnic autonomy and its consequences in post-coup Myanmar. May 30, 2024, <https://www.crisisgroup.org/asia/south-east-asia/myanmar/b180-ethnic-autonomy-and-its-consequences-post-coup-myanmar>.

## Major Questions

- What political mechanism can truly unify the diverse visions of the anti-junta coalition, specifically balancing the NUG's vision for a federal democratic union with the EROs' demands for autonomy or confederation?
- Can the new constitution accommodate both national integration and highly asymmetric regional governance? Furthermore, what non-political role, if any, could a reformed security apparatus play, and is credible transitional justice compatible with the stability required for institutional reform?
- Would the proliferation of grassroots, parallel governance systems lead to genuine decentralization or exacerbate institutional fragmentation, risking a slide toward warlordism?

To what degree would shifts in external influence from China, India, and ASEAN determine the military's willingness to negotiate?



# Chapter 2: Identity and Grassroots Relations

Calvin San

## Summary

The 2021 coup triggered widespread protests that challenged and sought to reshape historical subnational cleavages in Myanmar. Despite weak national integration, the movement initially unveiled newer patterns of collective action that grew into a countrywide resistance on an unprecedented scale. However, the fragmenting effects of decentralized resistance are now evident and stand in contrast to the earlier bridging and harmonizing impacts of anti-regime protests. What does the future of collective identity look like in light of these contradictory trends? What patterns of fragmentation and integration among different identity-based groups could exist in the post-conflict environment?

This analysis suggests that even though a binding national identity will likely remain weak or absent in post-conflict Myanmar, we can envision three scenarios for grassroots relations: a new pattern of locally-based fragmentation, traditional ethno-regional fragmentation, or broader integration across the country that eclipses some subnational divides.

## Context

Identity in Myanmar has remained fragmented along ethnic and regional lines. Barmars are the largest group and are concentrated in the centre (officially regions) of the country, while a significant number of non-Bamar—often referred to as ethnic minorities—reside in the peripheral areas (officially states). Nation-building has failed to produce a collective identity that bridges these divides. A ‘Myanmar’ national identity, which developed out of the Bamar nationalist movement during independence, has mostly been prevalent in the

centre, while non-Bamar nationalist movements have often sought greater autonomy.

Colonial divide-and-rule policies and arbitrary internal borders drawn after independence also contributed to these divides. Under successive military regimes, nation-building became synonymous with power consolidation in the Bamar-dominated centre. Even during the decade of liberalization between 2010 and 2020, peace efforts were hindered by the military's 2008 Constitution, which codified ethnic rights from a Bamar perspective.<sup>1</sup> Consequently, attempts to forge a unifying national identity have deepened fragmentation instead.

A potential softening of these divisions was observed in the aftermath of the 2021 coup. Protest narratives pushing for interethnic solidarity across the country emerged, openly engaging with issues that had been mostly secondary in mainstream politics, such as federal reform and Rohingya inclusion. Due to the decentralized nature of the anti-coup movement, a wide range of grassroots organizations have been incentivized to pursue collective goals and more comprehensively engage one another. Social media discourses have generally indicated more positive interethnic interactions and greater appreciation for consensus-based federal democracy among ethnic minority and Bamar-majority factions participating in resistance.<sup>2</sup> These developments remain fragile, however. Initiatives and nascent institutions facilitating collective action have come under threat as fighting continues and the military junta reclaims some territories.

The aforementioned changes do not indicate that pre-existing tensions or identity lines are disappearing, especially in the near term. Identity

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1 Bertrand, Jaques, Alexandre Pelletier, and Ardeth Maung Thawngghmung. (2022). *Winning by process: The state and neutralization of ethnic minorities in Myanmar*. Ithaca, NY and London: Cornell University Press.

2 David, Roman, and Aung Kaung Myat. (May 2022). Can regime change improve ethnic relations? Perception of ethnic minorities after the 2021 coup in Myanmar. *Japanese Journal of Political Science* 23(2): 1-16; Myat, Aung Kaung, Roman David, and Ian Holliday. (Spring 2023). Two concepts of federalism in Myanmar: How the 2021 military coup reshaped political discourse and opposition institutions. *Publius: The Journal of Federalism*, 53(2): 278-300.

is dynamic and situational and people tend to hold multiple identities. These changes also do not necessarily signal the development of a new national identity. Nation-building and the institutionalization of a binding national identity is typically a generational process. Yet anti-coup alliances and new forms of local governance have signalled that Myanmar’s diverse communities can work together across hardened cleavages even without an inclusive nation-building record.<sup>3</sup> Hence, instead of speculating on the disappearance of traditional identity lines (e.g. ethnic, regional), post-coup developments present an opportunity to envision how longstanding divisions could be eclipsed by new patterns of collective action among subnational actors.

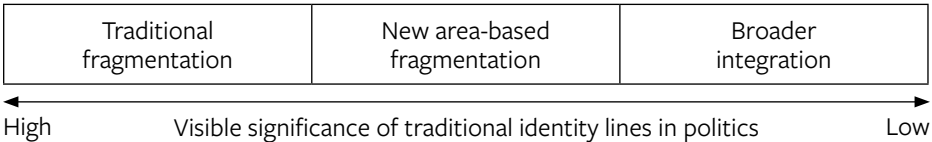
Scenarios

Three scenarios, listed below in order of likelihood, are conceivable in the medium term.

**Scenario 1 (New area-based fragmentation):** A unifying national identity remains politically insignificant or absent; collective identities and political fragmentation mainly reflect new local disparities among resistance movements and post-coup conflict theatres.

**Scenario 2 (Traditional fragmentation):** A unifying national identity remains politically insignificant or absent; collective identities and political fragmentation mainly reflect historical centre-periphery lines, including a Bamar and non-Bamar divide.

**Scenario 3 (Broader integration across the country):** A unifying national identity remains absent but new patterns of cross-group co-ordination signal the possible significance of a new collective identity that cuts across local *and* ethnic lines.



3 Thawngnhmung, Ardeth M., and Ashley South. (March 2025). Revolutionary regimes: Emerging forms of governance in post-coup Myanmar. Trends in Southeast Asia 2025/4.

## Analysis

In all conceivable scenarios within the post-conflict window, Myanmar lacks a prevalent, unifying national identity. Despite this, three political climates for intergroup relations can be envisioned. These scenarios should be understood as existing along a spectrum rather than as discrete states.

Although identity is fragmented at the national level, it is likely that new local disparities will strongly shape the post-coup political landscape. In this scenario, which represents the most likely medium-term outcome, integration/fragmentation reflects different experiences among resistance factions in forming administrative bodies and coalitions that include stakeholders in their areas. Integration may be facilitated by emerging local identities that cross traditional lines (e.g. ethnic, regional, religious) after co-ordination among local groups. Integration may also remain stunted due to the absence of shared local identity as traditional identities stay dominant. Karenni State is the most notable example of having inclusive governing bodies that promote diverse stakeholder engagement. However, with various post-coup local regimes appearing across six conflict theatres, uniform local integration is unlikely. This calls for greater focus on area-based differences to pursue peacebuilding and democratization. Local integration suggests different dynamics from past reconciliation efforts due to new armed actors and a trend of bottom-up changes since 2021.

Under fragmentation, traditional identity lines shaped by ethnonationalist movements in the centre and peripheries continue to drive social and political divisions.<sup>4</sup> While a limited number of shared identities have emerged among resistance movements, they remain less prominent than exclusive ethnic identities. This constrains collective action across traditional identity lines. Historically, such fragmentation has hindered peacebuilding and democratization by

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<sup>4</sup> Brenner, David. (September 18, 2024). Ethnonationalism and Myanmar's future. New Mandala.

reinforcing ethnic mistrust and divisive institutions (e.g. the 2008 Constitution). Yet there has been some departure from historical patterns of fragmentation since 2021, even in states commonly assumed to be dominated by a particular ethnicity. Although ethnic tensions still fuel political deadlocks in some areas (e.g. Chinland and Arakan), new intergroup coalitions and ongoing resistance co-ordination elsewhere make a full return to pre-coup-style fragmentation less likely.

While unlikely, broader integration across ethnicities and areas could occur even without a strong unifying national identity. In this more optimistic scenario—at least for peacebuilding and democratization—collective aspirations begin to outweigh subnational agendas in shaping peace negotiations and federal democratic governance. However, this is the least likely scenario, as it requires that a nationally coordinated resistance or a more coherent national project solidify first, on top of current highly localized efforts.

## **Changing Dynamics**

Clear breakdowns in cross-group coalitions, even in areas with relatively consolidated self-rule, are key indicators for shifts across our scenario spectrum. Changes in territorial control and the emergence of dominant actors will determine whether traditional identity lines are either bridged or reinforced across Myanmar and in local pockets. Particularly, attempts to bridge these divides could be suppressed or directed by highly centralized actors like the military or some ethnic armed organizations (EAOs). Still, it is important to note that EAOs are not a monolith—their capacities, goals, and openness to cross-ethnic collaboration differ.



## Major Questions

The struggle for autonomy and freedom from military rule has strengthened resistance alliances, but broader political projects, such as federalism, remain incoherent in practice. There is no widespread consensus over its implementation amid competing territorial claims and visions over shared political institutions.

- Continued reliance on ethno-centric models for federalism—specifically, contentious territorial arrangements based on *taingyintha* (‘national race’) classifications when designing policy—raises uncertainties about future integration rooted in a shared ‘Myanmar’ identity. Can different factions develop a shared sense of co-stakeholdership beyond their territories that help them address longstanding grievances?
- The 2025/26 elections are widely viewed as illegitimate by grassroots groups and take place in the context of multiple de facto administrative centres. How might the post-election regime redraw jurisdictions or attempt to assert control over territory that deeply distrust the centre and the Bamar majority?
- The military has long exploited ethnic divisions to fuel counterinsurgency by co-opting or (temporarily) allying with local factions in areas where it lacks operational strength. Will it continue to use peace dialogues for political leverage and to contain subnational organizations, while undermining ethnic inclusion and trust?<sup>5</sup>

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5 Stokke, Kristian, Kio Kwe Moo Kham, Nang K.L. Nge, and Silje Hvilsom Kvanvik. (March 2022). *Political Geography*, 93: 102551.

# Chapter 3: Myanmar's Civil Disobedience Movement

Hsu Myat Yadanar Thein

## Summary

Following the February 2021 military coup in Myanmar, a nationwide civil disobedience movement (CDM) emerged as a form of nonviolent resistance led by civil servants. By refusing to co-operate with the junta, this movement rapidly grew beyond a work stoppage into a broad collective identity grounded in dignity, sacrifice, and moral resistance to illegitimate authority. The movement has reshaped Myanmar's political culture by redefining courage as the refusal to legitimize injustice rather than the use of violence.

Today, despite facing harsh retaliation, the CDM continues to contribute to Myanmar's pro-democracy struggle by providing parallel services and underground governance in areas outside the junta's control, as well as in contested areas. This analysis provides a brief overview of the CDM, outlines plausible scenarios for the movement's future, and discusses the policy implications of each.

## Context

The CDM emerged in the immediate aftermath of the February 2021 coup, when tens of thousands of public sector employees across Myanmar refused to work under military rule. This act of mass non-co-operation was consciously framed as a form of civil disobedience. Within weeks, striking civil servants had effectively brought many government functions to a standstill.<sup>1</sup> Myanmar's bureaucrats and

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1 Frontier Myanmar. April 21, 2026. Non-violent resistance is shaking the dictator's throne. <https://www.frontiermyanmar.net/en/non-violent-resistance-is-shaking-the-dictators-throne/>; Stokke, K., and Kyaw, N. N. 2024. Revolutionary resistance against full autocratization: Actors and strategies of resistance after the 2021 military coup in Myanmar. *Political Geography*. 108: 103011.

professionals thus became front-line political actors, and their collective action fostered a new shared identity as “CDMers,” which connoted a collective commitment to the nation’s future.

The military regime responded to the CDM with systematic retaliation, aiming to punish participants and deter others. CDM-affiliated civil servants were immediately criminalized by the junta.<sup>2</sup> By mid-2021, the State Administration Council (SAC) had issued orders dismissing tens of thousands of striking workers from their jobs and charging many under Penal Code provisions (e.g., Section 505(a) for “incitement”) for leaving their posts. Regime-controlled ministries publicly blacklisted known CDMers to bar them from obtaining passports, travelling abroad, or moving freely within Myanmar.

Additional measures, including impeding CDMers’ employment opportunities, have forced many highly skilled workers into informal livelihoods that underutilize their skills. Furthermore, CDM families have lost civil service benefits, pensions, and, in some cases, access to education and identity documents, effectively becoming second-class citizens under military rule.

Nonetheless, CDM professionals continue to contribute to Myanmar’s survival and the country’s aspiration for a federal democracy. In areas outside the military’s direct control, CDMers have played a crucial role in establishing parallel administrations and delivering public services, thereby helping to underpin the emerging governance structures of the resistance and meet critical public needs.<sup>3</sup>

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2 Maw M. 2022. From resistance to reparation: Ensuring the rights of CDM civil servants in Myanmar. Chiang Mai University School of Public Policy; Chakma, T. November 15, 2023. Myanmar military slowly strangling public sector workers resisting their rule. Public Services International News.

3 Progressive Voice. May 25, 2023. Civil Disobedience Movement: A foundation of Myanmar’s Spring Revolution and force behind the military’s failed coup. <https://progressivevoicemyanmar.org/2023/05/25/civil-disobedience-movement-a-foundation-of-myanmars-spring-revolution-and-force-behind-militarys-failed-coup/>.

## Scenarios

The CDM's future is closely tied to Myanmar's broader political trajectory, as reflected in three plausible medium-term scenarios, listed in order of likelihood.

**Scenario 1 (Parallel Systems and Hybrid Reintegration):** CDM networks sustain parallel systems—including in education, health care, and administration—in areas beyond the junta's control, but struggle with resources, recognition, and consistency across groups.

**Scenario 2 (Long-term Marginalization):** CDMers and their families are forced into long-term exclusion as the junta consolidates political power in the absence of meaningful political reconciliation.

**Scenario 3 (Full Reintegration):** The CDM forms the foundation of a new civil service and comprehensive political reconciliation allows for a reset of the state structure.

## Analysis

**Scenario 1, parallel systems and hybrid reintegration,** is most likely in the medium term, with Myanmar remaining effectively fragmented into different political spheres. In this scenario, the CDM would contribute to parallel public service and administration systems in areas beyond the central government's control. In many of those areas, reintegration would be organic and community-driven, but uneven given the significant variation in infrastructure, local capacities, and needs. While the CDM would supplement local governance capacities in those areas, significant resource shortages would likely impose constraints on services, leaving local populations underserved. Chinese pressure on cross-border counterparts, meant to limit the ability of EROs to sustain combat, could add to that pressure.

**Scenario 2, long-term marginalization,** is plausible but less likely than Scenario 1, and entails the greatest costs for Myanmar. If the military consolidates power further and continues its harsh repression

of resistance movements, CDMers and their families are likely to face long-term marginalization, including legal restrictions, economic exclusion, and limited opportunities for earning a livelihood. This situation would lead to a significant loss of human capital and weaken Myanmar's long-term governance capacity. In the early stages of the movement, approximately 70 per cent of civil servants participated in the CDM. While some later returned to their positions, around 30 per cent are still believed to remain in the movement—representing a substantial loss of human capital for the country.

**Scenario 3, full reintegration**, is least likely. In this scenario, significant political reconciliation—whether achieved through negotiation, regime collapse, or internal mediation—could facilitate the systematic reintegration of CDM professionals. To fully capitalize on the skills and capacities within the CDM, reintegration would allow CDMers to resume their previous roles or pursue employment in other fields. Most CDMers are medical doctors, engineers, teachers, and the like. These sectors had limited resources before the coup. Reintegration could strengthen the country's governance capacity. Such a scenario holds the promise of a re-established civil administration rooted in public trust and moral integrity.

## Changing Dynamics

Several factors are instrumental in determining which scenario becomes a reality for the CDM. If the 2025–26 elections succeed in granting the junta greater recognition, the risk of long-term marginalization for CDMers grows, given that political loyalty may become a stronger prerequisite for public employment. Conversely, expanding or consolidating resistance-held territories could create the conditions for a hybrid reintegration scenario, especially if linked to more coordinated and accountable local governance. Shifting territorial control has, at times, opened space for alternative governance structures where CDM professionals can safely resume public service. However, this window is narrowing, as some resistance-held areas have recently been lost or have come under renewed threat.

A number of pragmatic considerations are noteworthy. First, livelihood security and professional recognition are urgent. Without pathways for re-entry, CDM professionals risk permanent displacement into informal labour or migration economies, eroding the very human capital Myanmar needs for reconstruction; recognition of credentials and reintegration mechanisms are essential for preserving this capital. Second, reintegration must occur in a manner that reduces resentment between the CDM and non-CDM populations; future placements must be criteria-based rather than politically driven.

Finally, the international community's actions will be consequential: donors, international non-governmental organizations, and scholarship schemes often do not recognize CDMers. Establishing mechanisms that acknowledge CDMers as democratic actors requiring protection, mobility pathways, employment access, and intellectual inclusion not only preserves individual dignity but also maintains the human infrastructure necessary for rebuilding an efficient, accountable, and responsive governance system.

## Major Questions

- How will Myanmar's future institutions recognize the CDM as a new collective identity shaped by sacrifice and exclusion?
- How will parallel governance systems interact with national structures during a transition?
- Can the CDM's moral legitimacy translate into sustainable institutional reform, or will it remain symbolic?

Addressing these questions requires careful policy planning, inclusive dialogue, and sustained commitment from all stakeholders who envision a democratic and just Myanmar. The fate of the CDM—whether it becomes the foundation of a new Myanmar or a tragic footnote—will be decided by how these issues are navigated in the critical months and years ahead.



# Chapter 4: Federalism

Dr. Sai Kyi Zin Soe and Ngwe Min Tar Yar

## Summary

Myanmar's federal trajectory in the medium term will likely be characterized by enduring territorial fragmentation, entrenched military authority, and the 2025/26 electoral process, which may provide procedural legitimacy to the centre without resolving core political divisions. Three post-conflict scenarios are plausible, of which a form of unstable crony federalism supported by international patrons is most likely. Marginally less likely is an arrangement with quasi-autonomous statelets; a comprehensive centralized federalism remains conceivable but unlikely, given its conditionality on improbable developments. State failure will likely be avoided due to international and regional interests in preserving at least minimal governance structures. The medium-term transition is thus defined by hybrid governance, complex legitimacy contests, and resilient, parallel institutional development in Myanmar's periphery.

## Context

The civil war in Myanmar, triggered by the military's February 2021 coup, reversed a decade-long partial opening and deepened territorial fragmentation and violence. It also renewed long-standing and contentious questions of federalism as a central component of Myanmar's contested nation-building project. For decades, some ethnic minority groups have called for federalism as a vehicle to secure greater autonomy, while successive military governments have equated federalism with national disintegration.<sup>1</sup> The 2008 military-backed Constitution institutionalized a highly constrained form of

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<sup>1</sup> Thawngmung, Ardeth. 2021. Myanmar: Why the Military Took Over. Critical Asian Studies. Published 22 February 2021.



‘federalism,’ but decision-making remained centralized, with local self-rule largely symbolic. Persistent distrust, rooted in decades of armed conflict, forced displacement, and broken promises, meant genuine power-sharing never materialized.

The 2021 coup dismantled even that limited federal experiment, setting the stage for both renewed resistance by ethnic revolutionary organizations (EROs) and broader calls for an authentic federal union as part of Myanmar’s democratic future. With the military retaining control of most urban areas, strategic transport corridors, and parts of the country’s Bamar-majority centre, the prospects of its decisive defeat and a fundamental institutional reset have declined.<sup>2</sup> Amid the stalemate, EROs have begun establishing quasi-state institutions across much of the non-Bamar periphery.<sup>3</sup> These new entities demonstrate a growing capacity for revenue collection, public service delivery, and local legitimacy, although the volatility of battlefield developments and external interventions has limited the degree of resistance consolidation.

The military-organized 2025/26 election is a notable development. Structured to exclude most pro-democracy parties and held only in areas under military control, the election institutionalizes the country’s political bifurcation, providing the junta with limited international recognition while failing to resolve the conflict’s root causes.<sup>4</sup> Major resistance organizations have shown no signs of joining or validating this process, despite selective international and economic pressure.

Currently, Myanmar’s centre-periphery trust deficit remains largely unbridgeable. Ethnic minority groups have secured unprecedented autonomy during the civil war and initiated parallel administrative

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2 Institute for Strategy and Policy – Myanmar. 2025. Prospective 4th Generation Tatmadaw. ISP OnPoint No. 27.

3 Thawngmung, Ardeth, and Ashley South. 2025. Revolutionary Regimes: Emerging Forms of Governance in Post-Coup Myanmar. ISEAS Trends.

4 Ostwald, Kai. 2025. Myanmar’s Wartime Polls: Managing Expectations. ISEAS Fulcrum. Published 3 September 2025.

systems around the country's periphery.<sup>5</sup> External support (both humanitarian and economic) provides a lifeline to both the centre and periphery, thereby reducing the risk of comprehensive state failure, but also entrenching fragmentation.

## Scenarios

Three post-conflict scenarios, listed below in order of likelihood, are plausible.

**Scenario 1 (Unstable Crony Federalism):** Military-organized elections provide international cover for junta rule; selective accommodation, especially in the north, creates a patchwork of governance. Institutional corruption and patron-client relationships prevail, state-society divisions persist, and humanitarian crises endure.

**Scenario 2 (Quasi-autonomous Statelets):** Parallel, sophisticated resistance institutions consolidate in the periphery. The centre maintains urban control, international recognition, and basic infrastructure; the periphery receives humanitarian and development assistance, but co-ordination remains minimal and legitimacy contests continue.

**Scenario 3 (Highly Decentralized Federalism):** A breakthrough enables negotiated constitutional change, civilian control, and robust power-sharing. Subnational authority would be recognized and institutionalized in a co-ordinated federal arrangement. Currently, this scenario is unlikely due to intractable trust deficits, military power, and external vetoes.

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<sup>5</sup> Reuters. 2024. Myanmar's ethnic armies consolidate strongholds as junta weakens, reports say. Published 30 May, 2024.

## Analysis

Myanmar's post-conflict trajectory is best understood as a contest between entrenched military authority, resilient emergent periphery governance, and international attempts at crisis management. In short, given the balance of power, the centrality of international patronage, and the persistent trust deficit, none of the leading actors can impose a decisive order.<sup>6</sup> Instead, hybrid or crony forms of federalism, or regionally varied autonomy, will likely define Myanmar's medium-term political landscape.

**Scenario 1, unstable crony federalism**, is the most plausible scenario. The 2025/26 electoral process institutionalizes the central military's claim to legitimacy, validated by patron-state observers but unrecognized by major resistance groups or the broader international democratic community.<sup>7</sup> However, this outcome does not presuppose full military reconquest of ERO-controlled territories. Rather, a patchwork persists: urban and strategic corridors remain under junta control, while EROs retain effective authority in many peripheral areas.

Military-ERO relations remain marked by unresolved conflict, including frequent skirmishes, blockades, and raids, but these are punctuated by pragmatic, local accommodation such as tacit ceasefires, territory-specific deals, or cross-line taxation and economic arrangements. While outright power-sharing is unlikely, the status quo hardens into a fragmented, hybrid order, maintained as much by mutual incapacity as by formal negotiation.

Selective accommodation is possible in the north and along China's strategic corridors where economic interests demand stability. The result is a patchwork of authority with urban areas and highways under junta rule and semi-autonomous peripheral regions. Cronyism

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6 International Crisis Group. 2025. Myanmar's Dangerous Drift: Conflict, Elections and Looking Regional Détente. Briefing no. 184. Published 18 July 2025.

7 Mi Kon Chan Non and Ashley South. 2024. Don't fall for the fake election in Myanmar. East Asia Forum. Published 11 October 2024.

thrives as economic and political power is traded for nominal stability, but absolute authority and legitimacy remain contested. Foreign aid and investments flow disproportionately to the centre, while Western resources sustain the periphery's humanitarian and development needs.

**Scenario 2, quasi-autonomous statelets**, is a moderately likely scenario involving further consolidation of resistance governance in the periphery, particularly as EROs and local administrations refine their taxation, judiciary, and service delivery. The centre retains key urban and corridor infrastructure, as well as international diplomatic recognition. Co-ordination between the centre and the periphery is minimal, with parallel governance developing unchecked.

While this scenario enables humanitarian and civil society operations to expand, it leaves numerous conflict flashpoints open and provides a limited basis for durable national reconciliation or unified economic recovery. This scenario becomes more plausible if external support for peripheral institutions continues unabated, if EROs successfully maintain territorial control against military pressure, and if the humanitarian crisis deepens to the point where parallel governance becomes the only viable mechanism for delivering essential services to populations outside areas under military control.

**Scenario 3, decentralized federalism**, is the least likely, yet the normatively most desirable. It requires a negotiated settlement that addresses core centre-periphery grievances and meaningfully decentralizes power, creating robust power-sharing mechanisms and addressing fundamental trust deficits. This could follow a future sequence of power dispersion within the military, international diplomatic pressure, or breakthroughs in resistance. Here, genuine federal institutions would replace parallel systems with constitutional guarantees and meaningful decentralized power. However, persistent military dominance, external vetoes (from actors like China), and unresolved security dilemmas render this scenario unlikely in the medium term.

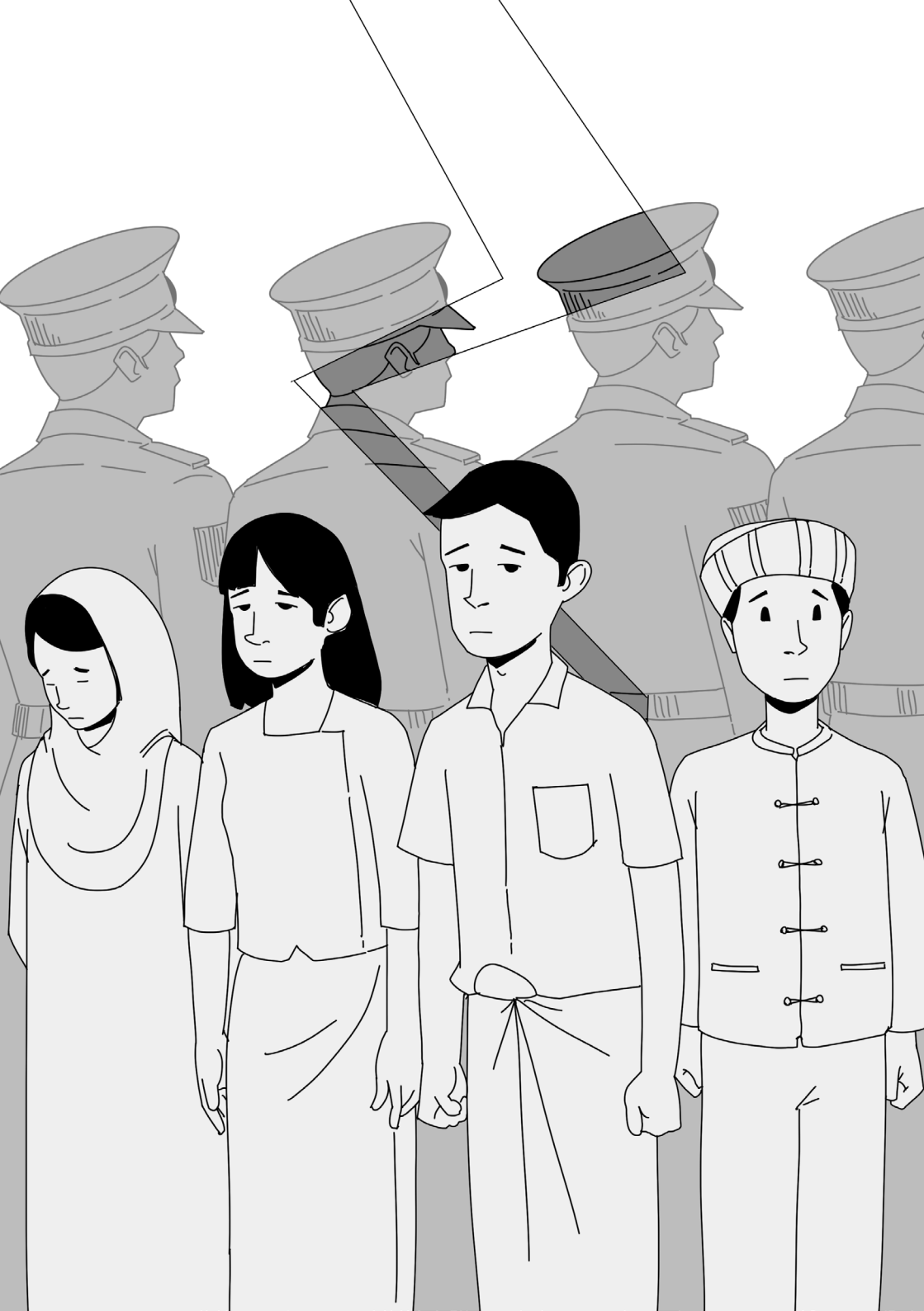
## Changing Dynamics

Shifts in external patronage, such as China or Russia's sudden reduction in support of the military or robust Western and regional alignment on inclusive negotiations, could undermine crony stability and make decentralized federalism more plausible. Conversely, consolidation of military power or increased ERO fragmentation could entrench the status quo or fuel renewed violence. The persistent fragmentation is underpinned by several factors: deep-rooted mutual distrust between the centre and periphery after decades of conflict and failed political settlements; diverging visions for Myanmar's future among both EROs and the Bamar-majority opposition; the presence of multiple foreign patrons with competing interests, supporting different actors and resisting a unified settlement; and structural impediments such as continued violence, fractured security environments, and the lack of credible mediation mechanisms. As a result, even if the frontlines stabilize, genuine integration or co-ordination between the centre and periphery could remain elusive.

Extreme humanitarian crises, sustained cross-border violence, or elite splits within either camp may create new pathways, but currently, institutional inertia and external constraints reinforce a managed but unstable fragmentation. The possibility of complete state failure is substantially mitigated by the parallel presence of domestic and external governance structures, ongoing humanitarian aid, and minimal patron-state commitments aimed at avoiding regional instability. Both China and regional powers have strategic interests in preventing total collapse, as complete state failure would create refugee flows, cross-border instability, and economic disruption that would require far more costly interventions than maintaining the current fragmented status quo.

## Major Questions

- How durable are the township- and state-level administrative structures developing in the periphery, and can they withstand renewed pressure from the centre or shifts in external financing?
- Is any scenario that brings civilian authority over the centre plausible without major military transformation or rupture in external support?
- What are the effects of persistent parallel humanitarian and economic systems on long-term legitimacy and nation-building?
- Will regional actors continue to prefer managed instability, or could shocks such as refugee flows or border crises provoke intervention or mediation?
- Above all, what would it take for deeply entrenched actors—military, resistance, and international patrons—to accept a new compact or tolerate meaningful loss of power?



# Chapter 5: Civil-Military Relations

Nay Yan Oo

## Summary

Since the 1962 coup, contentious civil–military relations have been one of the primary drivers of political instability in Myanmar. The military takeover in 2021 further exacerbated structural fault lines, precipitating an intense nationwide civil war. This chapter assesses the prospects for civil-military relations in the medium term following a cessation of violence in Myanmar. It argues that the most likely scenario is military-led politics, in which a China-backed, quasi-civilian administration maintains power through selective ceasefires with ethnic armed organizations (EAOs). While such an arrangement may generate short-term stability, it is less likely to produce genuine peace or democratic consolidation for the time being. A transition toward a professional military subject to civilian oversight remains a distant prospect.

## Context

Civil-military relations refer to the interaction between civilian authority and the armed forces—a dynamic that is critical for democratic stability and development.<sup>1</sup> In democracies and even in many authoritarian states, the military is under “objective civilian control,” functioning as a professional institution that does not directly intervene in politics.<sup>2</sup>

However, this is not the case in Myanmar. Originating as the Burma Independence Army, the military adopted a “dual function” doctrine,

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1 Feaver, Peter D. 1999. Civil-military relations. *Annual Review of Political Science*, 2(1): 211–241.

2 Huntington, Samuel P. 1957. *The Soldier and the state: The theory and politics of civil-military relations*. Cambridge: Belknap Press of Harvard University Press.



in which its role is both to defend the country *and* actively lead its politics.<sup>3</sup> This ideology was hardened in the decades following independence, as the Tatmadaw (the military's preferred name) fought a civil war against numerous ethnic armed groups and repelled a protracted incursion from Chinese Nationalist (Kuomintang) forces.

These historical events cemented the military's belief that it is the sole guardian of the nation; it sees itself as essential to protecting Myanmar's sovereignty, preventing the disintegration of the Union, and ensuring stability.<sup>4</sup> Consequently, the military views civilian politicians as self-serving figures willing to "sell out" the country. It perceives ethnic groups as threats intent on secession. Decades of isolation and Western sanctions have further deepened this institutional insecurity, driving the military to constantly intervene in politics to protect its wealth and power.

During the political liberalization period (2011–2021), relations briefly improved between pro-democracy actors and the military, and progress was made in the peace process via the Nationwide Ceasefire Agreement. However, this fragile trust collapsed with the 2021 coup.

In the post-coup landscape, the military is determined to dictate the country's political future on its own terms and dismantle the civilian opposition, particularly the National League for Democracy. Conversely, the National Unity Government (NUG) and the broader pro-democracy movement are determined to decisively defeat the military. Meanwhile, the landscape of EAOs has fractured; whereas some actively support the anti-junta movement, others are capitalizing on the instability to expand their territory and economic resources. There is little to indicate that a decisive defeat of the military is anything other than highly unlikely, particularly as it has secured greater support from China. There is also nothing to indicate that the military will voluntarily relinquish its role as a political actor.

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3 Myoe, Maung Aung. 2009. *Building the Tatmadaw: Myanmar armed forces since 1948*. Singapore: Institute of Southeast Asian Studies.

4 Callahan, Mary P. 2003. *Making enemies: War and state building in Burma*. Ithaca: Cornell University Press.

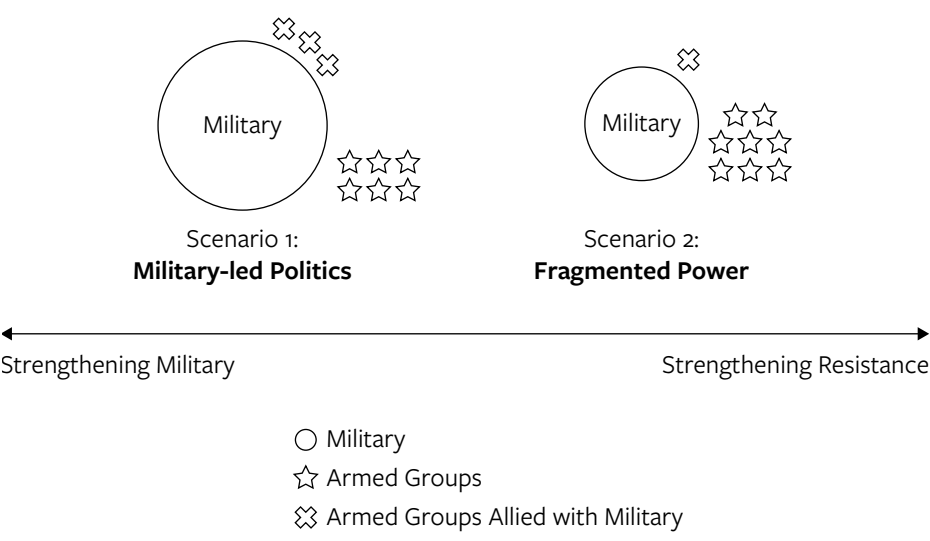
Myanmar’s politics revolve around these three key actors: pro-democracy forces, the military, and ethnic groups. Unless trust can be built among them, the country will remain stuck in a “coup trap”—a cycle whereby the military distrusts civilians, and civilian actors challenge the military rather than engage with it. Ultimately, the conflict in Myanmar remains a struggle over who should rule the country—civilian authorities or a military regime—rather than a debate over how the country should be ruled.

Scenarios

**Scenario 1 (Military-led Politics):** The military retains a central political role and shapes the post-conflict order largely on its own terms.

**Scenario 2 (Fragmented Power):** The military faces more coordinated resistance on multiple fronts, compelling it to concede a relatively greater amount of control.

Civil-military relations in post-conflict Myanmar



## Analysis

**Scenario 1, military-led politics**, is the more likely of the two. In this scenario, there is a military transition from direct rule to indirect governance, with the installation of a quasi-civilian administration led by former military officers, most likely through the Union Solidarity and Development Party (USDP). While limited political reforms may be introduced, the military would ensure that these do not undermine or challenge its central position and de facto political veto. On the security front, the military would negotiate ceasefires with selected EAOs to consolidate control over the Bamar heartland and major urban centres. Peripheral border regions and rural insurgent strongholds would remain under the de facto authority of EAOs and People's Defence Forces (PDFs). In short, the military will dominate “national” politics and its primary institutions, but will be unable to secure full control over the entire country, with parts of the periphery acting like semi-autonomous polities.

Two factors make this scenario more likely. First, China has shifted from cautious observation to active intervention in Myanmar's civil war, prioritizing the security of its strategic economic corridor.<sup>5</sup> It views a revitalized, military-backed central authority as the most viable guarantor of stability. Second, resistance forces remain divided and increasingly short of the resources they need to prevail over the military. While the military and some external actors may accept this arrangement for the sake of immediate stability, others will view military-led politics as incompatible with their long-term objectives. Ultimately, although this scenario could provide short-term stability and limited development, it is unlikely to resolve Myanmar's underlying political divisions.

**Scenario 2, fragmented power**, while less likely, is still conceivable. In this scenario, resistance groups manage to regain momentum and weaken the military. In such a case, the military could continue

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<sup>5</sup> Abuza, Zachary, and Nyein Nyein Thant Aung. March 4, 2025. Too little, too late: China steps up military aid to Myanmar's junta. Stimson Center Issue Brief.

to control major urban centres, but would see its overall territorial control shrink significantly. In addition, it would lose control over additional border crossings and key transportation routes, essentially returning to the position in which it found itself in the weeks after Operation 1027. A spate of violence under such conditions would leave the military politically constrained and counterbalanced by (relatively) more unified resistance groups. While the military would still likely control national-level institutions, those would have limited capacity both domestically and internationally, effectively leaving power fragmented across a diverse range of actors.

Two main factors, however, make this scenario less likely. First, resistance forces would need direct military support from external powers to counterbalance the military's strength. China remains wary of—and is unlikely to support—pro-Western actors like the NUG, while the West is unlikely to openly provide military aid. Second, no unified actor or charismatic leader has emerged to fully unite the various armed groups within the resistance movement. While this scenario offers a potential route to future peace and democratic governance, true stability and development cannot be obtained while the conflict is still raging.

## **Changing Dynamics**

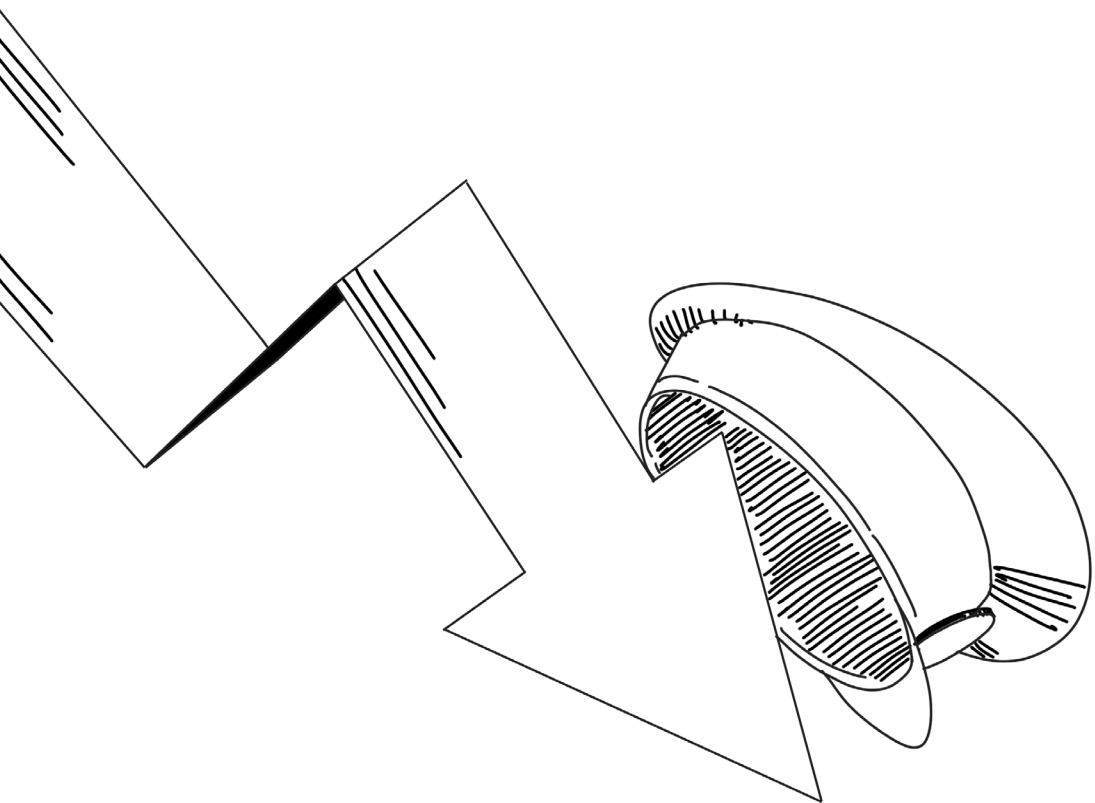
Military-led politics (Scenario 1) is the most likely outcome if several factors hold—China maintains its current level of support for the junta, the military remains institutionally cohesive, and relations between the armed forces and their political vehicle, the USDP, remain stable. However, if China shifts its stance and provides support to EAOs to pressure the Myanmar military, and if the resistance movement manages to unite its various armed groups—whether through an emerging charismatic leader, an institutional framework, or shared economic opportunities—then Scenario 2 (fragmented power) could become more plausible, particularly if divisions emerge within the military's senior leadership.

## Major Questions

- Assuming the military retains a central role in Myanmar's politics and genuine civilian control remains remote, what can we expect from the internal transition underway in the Tatmadaw, especially as a "fourth generation" of military leaders assumes senior command positions?<sup>6</sup> Even if that new cohort does not differ substantially from the current generals in terms of their political outlook or ideology, might there still be tensions between the outgoing "old guard" and incoming commanders? What impact could that have on the concentration of power in the military?
- Among the dozens of armed groups—both EAOs and Bamar-majority—fighting against the military, what is the future of *subnational* civil-military relations in the areas under their control? Some groups, such as the Karen National Union, Karenni Nationalities Defence Force, and portions of the NUG's PDFs, appear to lean towards civilian control. Can that be sustained and even further entrenched? In other groups, such as the Arakan Army and Bamar People's Liberation Army, the lines between civilian leadership and military commanders are blurred. Can the balance of power be meaningfully shifted towards the civilian side? And what about armed groups with little to no civilian oversight at all, such as independent local PDFs?
- Ultimately, the challenge of bringing armed groups under civilian control in Myanmar is not just a national-level problem; it also plays out in myriad forms at the subnational level within the range of armed groups dispersed across the country, making the question of how to invert the relative power disparity between armed groups and their civilian counterparts a compound one.

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6 Institute for Strategy and Policy – Myanmar. September 30, 2025. Fourth-generation generals rise to the heart of power. ISP Flash Updates 2025, FU2025-01.



# Chapter 6: Economic Trajectory

Ngu Wah Win

## Summary

Myanmar's economy faces significant challenges from ongoing conflict and the related growth of a conflict economy, the devastating March 2025 earthquake, and widespread structural issues, all of which inflict significant hardships on the population.<sup>1</sup> From the vantage point of early 2026, there are three plausible medium-term scenarios: prolonged instability with further stagnation (most likely), painful economic crisis leading to collapse (less likely), and protracted recovery (very unlikely). Key drivers of the outcome include inflation, labour shortages, export decline, and the state of the informal economy.<sup>2</sup> Recent developments such as the phased 2025-26 general elections and partial post-earthquake adjustments can influence the trajectory. Political settlements, targeted reforms, and regional cooperation could support early recovery and stabilization, with implications for peace, institutional rebuilding, and inclusive development.

## Context

Myanmar's economic challenges stem from historical patterns of authoritarian governance, resource dependency, and armed conflicts stretching back to independence. Military-led administrations prioritized extraction-based growth, leaving diversification limited, infrastructure weak, and deep inequalities pervasive, particularly in ethnic regions. The democratic transition from 2011 to 2021 brought partial economic reforms, foreign investment inflows, and high GDP

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1 Macbeth, Alistair. March 10, 2025. Cashing in on conflict: Illicit economies and the Myanmar civil war. Global Initiative Against Transnational Organized Crime.

2 World Bank. December 8, 2025. Myanmar's economy shows moderate signs of recovery amid earthquake and conflict impacts.

growth of 6-7 per cent annually, yet structural fragilities endured.<sup>3</sup>

The 2021 military takeover by the State Administration Council (SAC) triggered an intensification of armed conflict, as well as rampant resource extraction, violence, and illicit trade.<sup>4</sup> Due to escalating conflict and economic mismanagement,<sup>5</sup> the country's economic system has evolved into a dual structure: a shrinking formal sector under the government's oversight and expanding informal and conflict economies in areas controlled by ethnic armed organizations (EAOs) and resistance groups. The rapid growth of the informal economy is fueled largely by the lucrative incentives of territorial control and illicit trade, including taxing at checkpoints, illegal mining and logging, drug trafficking, smuggling of migrants, and human trafficking.<sup>6</sup> Policies such as fixed exchange rates, conscription, and spending priorities have contributed to inflation, shortages, and reduced confidence.

In March 2025, a magnitude 7.7 earthquake struck central Myanmar near Sagaing and Mandalay, causing thousands of deaths, widespread injuries, and extensive infrastructure damage, including to bridges and power grids.<sup>7</sup> This disaster compounded existing strains from conflict and Typhoon Yagi, reducing agricultural output and displacing populations further. In addition, labour markets have weakened, with mandatory conscription prompting youth to migrate overseas or join local militias.<sup>8</sup> Conflict-driven displacement and overseas migration have further reduced the availability of both skilled and unskilled

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3 International Monetary Fund. 2013. Myanmar: 2013 Article IV Consultation and First Review Under the Staff-Monitored Program. (IMF Country Report No. 13/250).

4 Thein, Htwe Htwe, and Michael Gillan. June 23, 2021. How the coup is destroying Myanmar's economy. East Asia Forum.

5 U.K. Foreign, Commonwealth & Development Office. October 23, 2025. Overseas business risk Myanmar (Burma).

6 Bissinger, Jared. 2025. Challenges and priorities for Myanmar's conflicted economy. ISEAS Fulcrum.

7 Mansaray, Kemoh, Kim Alan Edwards, Thi Da Myint, Sutirtha Sinha Roy, and Aka Kyaw Min Maw. 2025. Myanmar economic monitor: Economic aftershocks. World Bank.

8 UNDP. August 2025. A generation on the move: Youth migration and perceptions in Myanmar.



labour.<sup>9</sup> Meanwhile, energy shortages and supply disruptions have constrained industrial output.<sup>10</sup>

The SAC organized phased general elections for December 2025 and January 2026; the military-backed Union Solidarity and Development Party (USDP) secured a large majority of seats amid low turnout and ongoing security challenges. While many international observers criticized the elections as illegitimate, some neighbouring countries and stakeholders see them as a potential pathway towards dialogue, peace, and economic stabilization. Myanmar's economic outlook remains uncertain, and there are cautious predictions of modest growth in 2026. Informal trade and remittances provide some cushioning against high inflation, but there is a need for inclusive approaches to improve livelihoods and rebuild trust.

## Scenarios

**Scenario 1 (Prolonged instability with stagnation):** The country experiences continued volatility with slow growth, elevated inflation, and limited reforms amid persistent challenges.

**Scenario 2 (Painful economic crisis and steep downturn):** The economy undergoes an accelerated decline from policy challenges, external shocks, or intensified disruptions.

**Scenario 3 (Protracted recovery):** The situation gradually improves through political dialogue, consistent reforms, and international cooperation following the election.

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<sup>9</sup> UNDP. September 2024. Migration in Myanmar: Moving to cope.

<sup>10</sup> De Langre, Guillaume. July 2024. Myanmar is running out of gas. What happens next? The Diplomat.

## Analysis

**Scenario 1, prolonged instability**, is the most likely scenario. It is characterized by persistent volatility that avoids complete collapse but prevents meaningful recovery. Without serious reforms, the economy will experience stagflation, combining slow growth with high inflation. Superficial governmental responses, such as a partial relaxation of controls or minor foreign exchange adjustments, will be insufficient to address deep-rooted structural weaknesses or stimulate sectoral performance. As a result, key economic sectors like agriculture, manufacturing, and tourism will continue to struggle as ongoing violence disrupts agricultural zones and critical trade gateways. This sustained instability exacerbates labour market issues by driving worker migration, while high inflation likewise compels poor households to seek opportunities abroad as their wages fail to meet the rising costs of living.<sup>11</sup>

Despite these challenges, the economy avoids a sudden halt due to the resilience of some sectors and informal trade networks with neighbouring countries, which expand the informal economy.<sup>12</sup> Non-state actors, controlling strategic border gates and logistics, will benefit, potentially solidifying their territorial and economic power.<sup>13</sup> In this scenario, the general population suffers significantly from stagflation, rising unemployment, and deteriorating living conditions. Youth face uncertain futures, potentially leading to increased overseas migration or participation in armed movements, perpetuating a cycle of poverty and conflict, and risking a ‘frozen conflict’ whereby violence persists and underlying political grievances remain unaddressed, leaving democratization unlikely.

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<sup>11</sup> UNDP. January 2025. Myanmar’s enduring polycrisis: Four years into a tumultuous journey.

<sup>12</sup> Bissinger, Jared. 2024. Myanmar’s resistance and the future of border trade: Challenges and opportunities. Trends in Southeast Asia. ISEAS Yusof Ishak Institute.

<sup>13</sup> Michaels, Morgan. September 2023. Fighting rages along Myanmar’s transport routes. IISS Myanmar Conflict Map.

**Scenario 2, painful economic crisis and steep downturn,** is somewhat less likely. In this scenario, the economic downturn would be triggered by structural breakdown, sectoral failures, domestic policy missteps, and external shocks. Myanmar's susceptibility to natural disasters and its limited disaster response capacity make it uniquely vulnerable. Under these conditions, government missteps in exchange rate supervision, trade restrictions, and price controls could plunge the economy into crisis. Banks with high non-performing loans could face runs, eroding public confidence. Further disruptions to infrastructure repairs would compound the crisis.

This type of sudden economic halt could destabilize the conflict economies of non-state actors, leading them to prioritize local rivalries over a unified front. This, in turn, could aggravate local tensions over territories and resources, creating a failed state on Myanmar's borders that entrenches warlordism and precipitates a mass exodus of populations—a major concern for neighbours. A collapse of the central state would not be impossible, erasing decades of development and requiring massive, long-term international efforts to rebuild basic functions.

**Scenario 3, protracted recovery,** is the least likely. In this scenario, growth would rebound modestly to 2-3 per cent annually, with inflation easing as reserves are rebuilt through renewed foreign investment and aid. The informal sector, particularly parts of the conflict economy, would be displaced by more organized and productive formal sector activities, thereby also improving resource usage and mitigating the harms of illicit trade. Ultimately, this outcome is very unlikely without broader political accommodations, which, at the time of writing, appear to be a distant prospect. However, regional interest—particularly from China and Thailand—in seeing Myanmar stabilize could facilitate or even compel greater cooperation among a range of stakeholders.

If and when a protracted recovery is initiated, it would entail the gradual restoration of confidence in key institutions, infrastructure

repairs, and inclusive growth. For the population, this would bring gradual relief through improved access to jobs, education, and healthcare, fostering social cohesion and reducing poverty over time, although initial inequalities might persist until inclusive policies take effect.

## Changing Dynamics

The probabilities of each of these scenarios will be shaped by key drivers such as political stability, external shocks, and regional engagement. If reforms are limited to minor adjustments, such as superficial tweaks to exchange rates or short-term aid, without tackling core issues like political inclusion, ceasefires, or deep reforms, Scenario 1 (prolonged instability) becomes entrenched. This would fail to restore confidence or reduce conflict, perpetuating stagflation, outflows, and fragmentation, with implications for sustained tensions, persistent poverty, and stalled institutional progress.

New disasters, escalating clashes, banking instability, or trade restrictions would push the situation toward Scenario 2 (painful crisis and a steep downturn). In this scenario, vulnerabilities are exacerbated, including, for example, reserve depletion and inflation, triggering contractions and emergencies and prompting acute shortages, mass displacement, and regional spillover effects via migration. Meaningful progress in dialogue, ceasefires, or enhanced regional support (e.g. from China and Thailand via infrastructure and trade) could raise the prospects of Scenario 3 (protracted recovery). In this scenario, reforms could rebuild trust and foster growth, reduce poverty, and improve social cohesion, albeit only with sustained monitoring.

## Major Questions

- Could the results of the election significantly influence policy direction and stakeholder confidence, strengthening doubts about a genuine transition away from military rule given the USDP's composition of loyalists? Could this lead to continued prioritization of security over economic reforms and erode trust among opposition groups and international partners?
- What might the longer-term impact of the 2025 earthquake be, especially if ongoing recovery efforts and delays prolong disruptions in key sectors like agriculture and manufacturing?
- Will regional actors—such as China through infrastructure investments or Thailand through border trade agreements—be able to facilitate meaningful trade and aid coordination in the coming months, depending on their strategic interests and Myanmar's internal stability?
- How will conscription and migration trends reshape future labour availability, and will shortages be exacerbated in key sectors?

# Chapter 7: Digital Futures

Myo Min Aung

## Summary

Myanmar's digital future directly affects the country's democratization trajectory. Digitalization, accelerated by the 2012 telecom liberalization, initially catalyzed democratic progress in Myanmar. Yet digital technology remains a contested domain of power, essential for economic and governance modernization, but equally capable of enabling authoritarianism, the path Myanmar has taken since the 2021 coup.

The coup stalled improvements in the digital economy and triggered a telecoms exodus: Telenor and Ooredoo abandoned their operations, cell tower investors such as Axiata withdrew from the country, and Alibaba's affiliate Ant Group exited Myanmar's nascent fintech industry. Simultaneously, the military banned Facebook, X, and Instagram, crippling the digital economy and consolidating digital authoritarianism.

While Myanmar is now regressing digitally due to the ongoing conflict, the Association for Southeast Asian Nations (ASEAN) is striving for regional prosperity by pursuing the world's first region-wide digital economy framework. Myanmar is likely to be excluded, prolonging its marginalization from the regional digital agenda. Whether Myanmar catches up with the regional digital economy agenda will be determined by the state of stability and democratization in the country.

## Context

Currently valued at around US\$300 billion and projected to reach US\$1 trillion by 2030, ASEAN's digital economy has become the region's defining development priority. The World Economic Forum describes the ASEAN Digital Economy Framework Agreement (DEFA) as "world's first comprehensive regional digital economy agreement."<sup>1</sup> ASEAN itself is pushing its member states, especially Cambodia, Laos, Myanmar, and Vietnam (the CLMV countries), to urgently align with regional integration requirements, making digital economy readiness a structural necessity rather than merely optional. The 2020 CLMV E-Commerce report recognized Myanmar's leapfrogging in the digital ecosystem since the 2012 telecom liberalization and rapid improvements in connectivity and ICT infrastructure. The digital economy sector was estimated to grow from US\$100 million in 2010 to US\$6.4 billion in 2030.<sup>2</sup>

Despite earlier progress, the 2021 coup crippled the digital economy and Myanmar's telecom infrastructure has been extensively damaged by the civil war. In 2021 alone, for example, over 400 cellphone towers were destroyed and the military has imposed internet shutdowns 420 times to date, leaving 80 out of 330 cities without access to reliable internet. Myanmar's overall internet freedom score dropped from 31 (out of 100) in 2020 to 2 (out of 100) in 2025.<sup>3</sup> This environment has driven foreign investment out of the telecom and digital industry. Moreover, the political and digital collapse has created a vacuum, attracting infamous cyber scamming operations that have exploded into a US\$60 billion industrial-scale market since the coup. The deep fracture caused by the coup has left Myanmar's political and policy streams misaligned and poorly positioned for integration with the regional digital economy.

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1 Feingold, Spencer, and Anne-Katrin Pfister. October 28, 2025. ASEAN takes major step toward landmark digital economy pact. Centre for Regions, Trade and Geopolitics.

2 Oxford Business Group. 2020. Myanmar's new digital strategy improves ICT development and network readiness. The Report: Myanmar 2020.

3 Freedom House. 2025. Freedom on the Net 2025: Myanmar.

The digital economy is a treacherous, double-edged sword for Myanmar. Strategic and careful maneuvering of the digital economy could significantly improve Myanmar's peace, stability, and democratization; conversely, unchecked side effects could become a catastrophic bottleneck for its democratic future.

## Scenarios

There are three plausible scenarios over the medium term, listed in order of likelihood below.

**Scenario 1 (Prolonged Marginalization):** In the absence of a meaningful political resolution, Myanmar is excluded from DEFA and the broader opportunity for growth, resulting in prolonged marginalization of its digital economy.

**Scenario 2 (Gradual Reintegration):** Power is consolidated under military rule on paper but significant tensions with other political actors in the country remain. Myanmar signs DEFA, but lags in its implementation, resulting in a slow but gradual digital economy integration.

**Scenario 3 (Rapid Integration):** Favourable conditions allow Myanmar to sign DEFA and rapidly integrate into the regional digital economy and take advantage of its growth, leading to a second leapfrog moment for the nation.

## Analysis

**Scenario 1, prolonged marginalization,** is the most likely. In this scenario, Myanmar's digital sphere is excluded from DEFA as a result of Myanmar's diminished regional credibility and protracted instability. ASEAN leaders have taken a number of steps to pressure Myanmar in recent years, including denying Myanmar the ASEAN chairmanship in 2026, re-endorsing the Five Points Consensus at their October 2025 summit, and regularly expressing disappointment at



the lack of substantive progress in political reconciliation, as well as significant reservations about the 2025-26 election.

The military's push to reclaim previously lost territory also expanded battlefronts, thereby broadening internet shutdown zones. All of these make signing DEFA in 2026 unlikely. In terms of digital economy integration, from 2021 to 2025, ASEAN accelerated digitalization, addressing the digital divide with the IAI Workplan (2021-2025) for CLMV countries. However, Myanmar was distracted by the civil war, causing it to miss this phase. Persistent political instability risks Myanmar missing the next digital integration wave under the ASEAN 2045 vision, further entrenching a prolonged marginalization.

**Scenario 2, gradual reintegration**, is a less likely but nonetheless possible scenario. In this case, Myanmar legally signs DEFA, but unresolved political and armed conflict stalls implementation of digital economy integration. The junta formally consolidates power, but continues to lack control over large swathes of Myanmar's territory and remains enmeshed in political and armed conflict with a range of subnational actors. ASEAN may accept this as a sufficient political status quo and allow Myanmar's accession to the agreement. While that would be a meaningful step, it would not address the major challenge of restoring large swathes of Myanmar's digital infrastructure that have been damaged during the civil war; making those repairs in areas under the control of Ethnic Revolutionary Organizations (EROs) is unlikely without meaningful political reconciliation.

As Myanmar already lags significantly behind ASEAN in each of the six pillars of the ASEAN Digital Integration Index, implementation would be difficult under even favourable circumstances. Thus, in the absence of meaningful political reconciliation, implementation and regional integration of the digital economy's strategic pillars may be dragged out indefinitely, even if the agreement is signed.

**Scenario 3, rapid integration**, is the least probable. In this scenario, Myanmar signs DEFA while also managing to rebuild digital infrastructure and achieve rapid digital economy integration, marking a second leapfrog moment. This is only possible, however, following comprehensive political reconciliation that allows coordinated action between different stakeholders across the country, including with major subnational stakeholders in ethnic areas.

To fully enable a second leapfrog moment, Myanmar would need to lay the legal groundwork for digital integration, consolidate the scattered data protection elements across multiple laws, and strengthen other pillars of digital integration. Simultaneously, digital infrastructure in ERO-controlled areas would need to be restored through humanitarian aid. Achieving this would create the legal groundwork and restore the digital infrastructure needed to support rapid growth of the digital economy and integration into the emerging regional framework. The necessary conditions may seem beyond reach at the moment, but there is some historical precedent that suggest it could be possible: following the 2012 telecom liberalization, Myanmar grew from having minimal infrastructure to a billion-dollar digital economy in less than a decade. With restored domestic political stability and capable digital leadership, repeating such gains could happen.

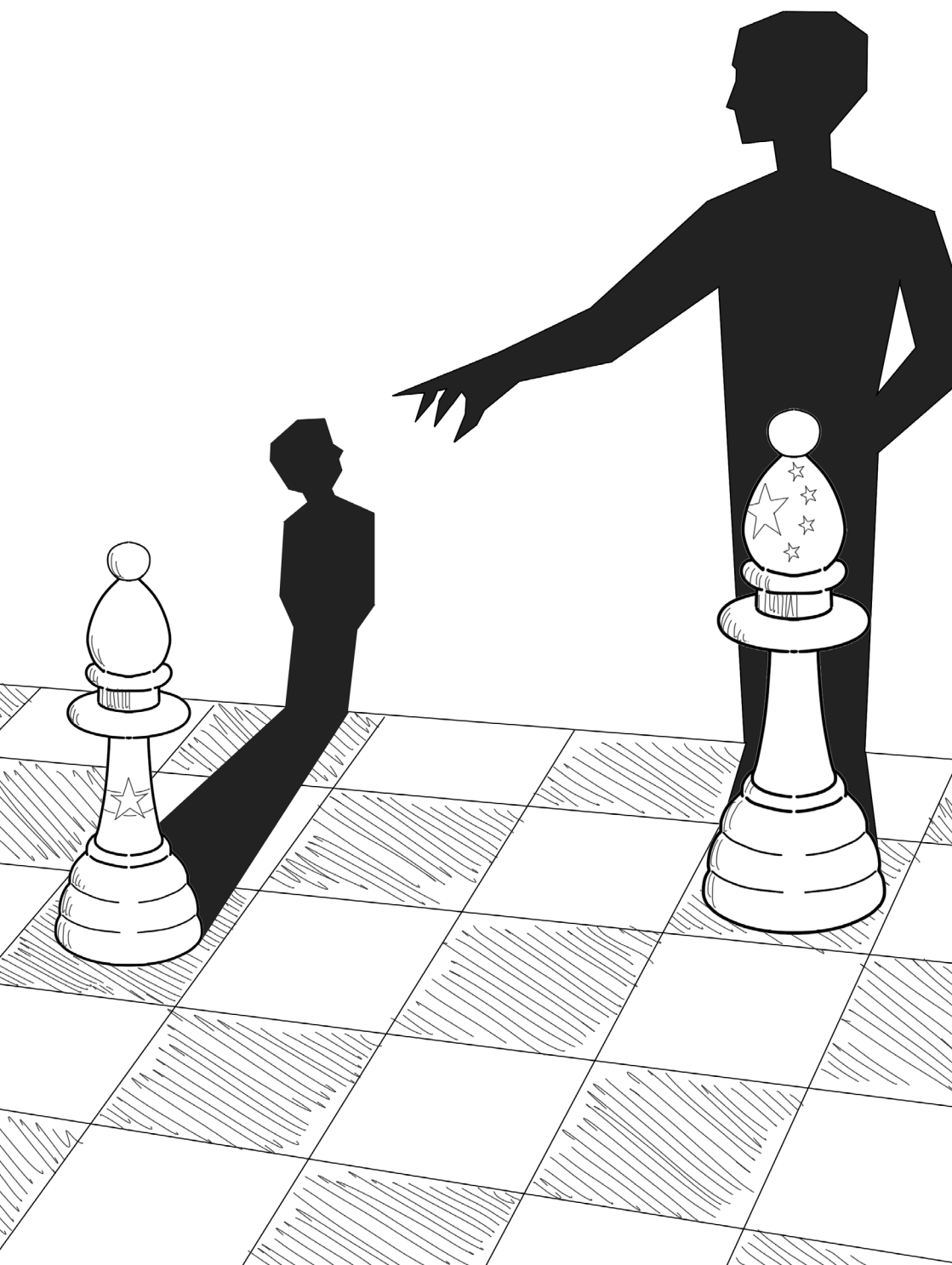
## **Changing Dynamics**

Each of the future scenarios is highly contingent upon the country's political trajectory. A prolonged conflict and the absence of meaningful political reconciliation are likely to result in an extreme "double digital divide": not only would the country fall behind the rest of the region, but significant domestic digital disparities would emerge. This divide would pose a major challenge to future democratization and governance, while also exacerbating socioeconomic inequalities and further fueling the conflict economy via scam centres and related schemes.

Another potential dynamic warrants consideration: should the military further consolidate power, whether through the 2025-2026 election or some other vehicle, the country's digital trajectory could shift from integration with ASEAN's digital economy to integration within a larger authoritarian digital sphere of China and/or Russia, given the State Administration Council's (SAC) close ties to both regimes. Regardless of the path of digital integration, the expanding base of digital users is vulnerable to becoming a target for an extended scam market or digital labour exploitation by existing scam operations within the country.

## Major Questions

- If Myanmar fails to maneuver its digital integration toward the public good, could there be dire consequences, such as fueling scam operations and other inhumane businesses, potentially leading to an isolated digital dictatorship?
- How will choices by key actors influence the country's peace, stability, and democratization? While the junta's digital strategies may be driven primarily by the objective of consolidating power, could the SAC-controlled administrative bodies restore digital infrastructure and manage a digital economy, even if this restoration was very limited?
- Despite the substantial technical challenges in the face of hollowed-out capacity, could effective coordination comprehensively rebuild the digital economy?
- Given the speed at which ASEAN's regional digital integration and policy dynamics are moving, is it possible that Myanmar has already lost out on prospects in this domain?



# Chapter 8: Myanmar in the World

Napas Thein

## Summary

Myanmar's post-2021 coup conflict is reshaping its international relations as foreign powers navigate shifting alliances between junta, the National Unity Government (NUG), and ethnic revolutionary organizations (EROs). Three post-conflict trajectories are emerging: fragmentation (with multiple domestic actors independently pursuing diverging foreign policies), isolationism (with a dominant central regime aligning narrowly with China and Russia while cutting ties with the West), and internationalization (with a possible federal democratic transition enabling balanced global engagement and involvement of international institutions). Each pathway has distinct implications for aid, trade, security, and regional stability.

## Context

Myanmar occupies a pivotal geographic and political position in Southeast Asia, as it borders Bangladesh, China, India, and key states in the Association of Southeast Asian Nations (ASEAN). The country's foreign policy has historically been shaped by the principle of neutralism, which refers to Myanmar's effort (under various regimes) to balance relationships with major powers while avoiding formal alignments.<sup>1</sup>

The February 1, 2021, military coup shattered this careful posture. The junta's seizure of power drew renewed Western sanctions and forced the region's various actors to recalibrate. China hedged by supporting the junta while cultivating influence with EROs, including the Three Brotherhood Alliance (3BA), whose territories intersect

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1 Maung Aung Myoe. 2019. Myanmar Foreign Policy: Principles and Practices. In Takashi Inoguchi (ed) *The SAGE Handbook of Asian Foreign Policy*.

with China's Belt and Road Initiative.<sup>2</sup> India, Thailand, and ASEAN states have engaged multiple sides simultaneously,<sup>3</sup> while the West is more favourable to the NUG but avoids granting it official recognition, limiting the West's role largely to providing humanitarian aid.<sup>4</sup>

A notable geopolitical development is the rise of Myanmar's rare-earth sector. U.S. actors are increasingly attentive to Myanmar's role in supplying rare-earths that are critical to high-tech and defence industries, especially as China dominates rare-earth processing but relies heavily on imports from Myanmar.<sup>5</sup> While Washington's exact approach remains unclear, the U.S. (and particularly President Donald Trump) may view Myanmar as both a lever against China's supply chain and an opportunity to end another "un-endable war."

## Scenarios

Three scenarios, listed below in the order of likelihood, are plausible in the medium-term.

**Scenario 1 (Fragmentation):** Myanmar fractures into competing authorities, with the junta, the NUG, and EROs each managing their own foreign ties. International actors navigate layered diplomacy, fuelling aid competition, intra-resistance tensions, and proxy risks as neutralism collapses into fragmented, multi-agent engagement.

**Scenario 2 (Isolationism):** A dominant junta asserts control, aligning narrowly with China and Russia and restricting foreign aid and activity by civil society. Strategic bilateral ties persist, but Western sanctions deepen, isolating Myanmar internationally and entrenching

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2 Wai Yan Phyo Naing and Lin Sae-phoo. 2025. Northern Myanmar Poses a Challenge to China's Critical Minerals Strategy. *The Diplomat*. Published 9 May 2025.

3 William J Jones. 2025. Myanmar shows ASEAN centrality is weakening. *East Asia Forum*, published 14 March 2025.

4 Joanne Lin and Moe Thuzar. 2022. *The Struggle for International Recognition: Myanmar after the 2021 Coup*. ISEAS Fulcrum.

5 Institute for Strategy and Policy – Myanmar (ISP Admin). 2025. *Unearthing the Cost: Rare Earth Mining in Myanmar's War-torn Regions*. Published 10 June, 2025.

authoritarianism under military-led governance. Trump remains a factor.<sup>6</sup>

**Scenario 3 (Internationalization):** Some form of federal democratic transition restores a more legitimate central authority, enabling Myanmar's re-entry into global institutions. Balanced foreign relations emerge, sanctions ease, and aid shifts to development, although military accountability is a challenge and fragile federal arrangements complicate sustained international engagement.

## Analysis

Myanmar's post-coup trajectory hinges on several factors, such as territorial control, external engagement, and the weakening of global institutions.

**Scenario 1, fragmentation,** is the most likely, as neither the junta nor the resistance forces currently control most of the country. EROs already act as de facto administrations with foreign ties, albeit to significantly varying extents. U.S. engagement, particularly given Trump's instinct to 'end' another war or disrupt China's rare-earth supply, would reinforce multi-actor engagement. In this scenario, competing authorities like the junta, the NUG, and EROs govern their own territories and pursue separate foreign relations. China maintains ties with both the junta and the 3BA. The non-U.S. West hesitates on recognition, while the U.S. may deepen involvement if it sees it as an opportunity to effectively counter China. This may increase instability, increase the risk of proxy conflict, stymie development, and lead to general democratic decay.

While the NUG would reject fragmentation and seek national authority, EROs might benefit from increased leverage, aid, and recognition. The junta would be opposed to this arrangement and

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6 Hunter Marston. 2026. A Rigged Election is No Reason to Reengage Myanmar: Washington's outreach to Myanmar's junta is shortsighted. Foreign Policy. Published 9 January 2026.

would continue to try to gain central control. China would try to balance both sides, fearing an increase in U.S. influence near its border, whereas the U.S. might welcome fragmentation if it weakens China. Other Western countries and institutions would struggle to co-ordinate their efforts, thus fragmenting and complicating the provision of aid.

**Scenario 2, isolationism**, is perhaps marginally less likely than Scenario 1. The strength of the resistance could prevent total junta dominance, but the decline of global institutions and humanitarian aid nonetheless make it plausible. Trump could raise the odds of this scenario coming to fruition by adopting a North Korea-style attraction to despotic regime leaders. In this scenario, a consolidated junta restricts aid, represses civil society, further undermines the media, and narrows its foreign ties to China, Russia, and Thailand. The U.S., if it decides to engage with the Myanmar issue, deprioritizes democracy, focusing instead on rare-earths and/or stability. This could lead to an entrenched dictatorship, economic stagnation, and a nonexistent democratic space.

In this scenario, the NUG and EROs are marginalized and thus strongly opposed. In contrast, the junta prefers this scenario, as it preserves the possibility of impunity and possibly even allows it to capture economic control. China would find it acceptable if having the junta as a partner brings stability. The U.S. could tolerate this scenario because of its pragmatic goals, while other Western countries and institutions might oppose it rhetorically but would lack the leverage to act.

**Scenario 3, internationalization**, is conceivable but very unlikely given the current weakness of global institutions, the shrinking of Western aid, and the lack of durable investment in federal democratic programs. Even if resistance forces manage to regain some momentum, meaningful centralization will encounter numerous prohibitive obstacles. In this scenario, a federal democratic transition centralizes foreign policy under the NUG, reopens effective ties with



ASEAN and global institutions, and channels aid into development. It is the best path for peace, democracy, and development, but is improbable without reinvigorated external commitment and support for inclusive resistance institutions. In this scenario, the NUG—or some analogous version of it—gains increased legitimacy, but EROs are divided between integration and autonomy and cautious about the lack of implementation of a truly inclusive federal democracy. The junta is opposed to this scenario, especially as it makes international impunity less likely. China is wary of losing influence over a democratic and Western-influenced regime but will find a way to work with the circumstances out of regional and economic interests. The U.S. and other Western countries would back this outcome rhetorically and possibly support the country's development, depending on the state of international aid and trade.

## Changing Dynamics

If Trump's desire to acquire rare-earths or intervene in overseas conflicts grows, prioritizing U.S. strategic access to Myanmar's deposits over broader democratic goals, then Scenario 1 (fragmentation) and Scenario 2 (isolationism) could become more likely. Washington might tolerate a junta-led state if it could secure mining cooperation, sidelining resistance actors in exchange for transactional deals. It might also find itself in competition with China for diplomatic influence.

If U.S.-China tensions rise over Taiwan, Myanmar would almost certainly tilt further toward Scenario 1 (fragmentation). Regional proxy competition would intensify, with China doubling down on its ties to the junta and EROs located along Belt and Road corridors, while the U.S. invests more heavily in supporting the NUG and non-3BA EROs to check Chinese influence.

In the unlikely event that resistance actors achieve a renewed breakthrough or the junta suddenly weakens considerably (such as through the death of General Min Aung Hlaing or junta-elite

infighting) then Scenario 3 (internationalization) may briefly become plausible. A window could open for a federal democratic transition with broad recognition, provided international actors seize the moment to invest in inclusive central institutions.

If a ‘slow burn’ continues, with Western aid retracting, international institutions withering, and diaspora support for resistance weakening, then Scenario 2 (isolationism) becomes more plausible over time. A weakened NUG and fragmented EROs would struggle to sustain governance alternatives, leaving the junta in control of foreign engagement, however brittle its rule.

## Major Questions

- Are Trump’s objectives vis-à-vis Myanmar limited to rare-earths and transactional deals?
- Will international aid continue to decline, or could shifting defence budgets redirect funds into the region, replacing aid with security-driven investment?
- How will the Philippines position itself as the 2026 ASEAN chair? Will it make Myanmar a priority?
- How will other conflicts—in Ukraine, Gaza, or elsewhere—re-order great-power priorities toward or away from Myanmar?
- Can overseas networks or unexpected economic opportunities sustain resistance structures in the absence of Western aid?
- If the junta weakens significantly, will Beijing opt to engage individual EROs in a fragmented manner, or support the emergence of a more unified federal democratic framework?
- Can international organizations regain influence, or will their decline leave Myanmar’s future shaped solely by bilateral great-power competition?

# Conclusion: The Futures of Myanmar

Htet Thiha Zaw

On December 28, 2025, Myanmar held its first elections since the 2021 military coup d'état ended the period of civilian-military power sharing. The elections, which took place over three rounds in the areas of the country under military control, are part of the junta's attempt to restore political normalcy and assert its legitimacy after facing staunch resistance from civilians and ethnic revolutionary organizations (EROs) over the previous five years. The elections, however, were deeply flawed, so aside from a few close military allies, they failed to receive international recognition.<sup>1</sup> This includes from the Association of Southeast Asian Nations (ASEAN), as Malaysia, the organization's 2025 chair, announced that ASEAN would neither endorse the elections nor send observers.<sup>2</sup>

Meanwhile, the country continues to suffer from a polycrisis that includes a lack of security, economic hardship, and the impact of natural disasters. Amidst these crises and broader uncertainty, predicting Myanmar's political trajectory is a nearly impossible task. The military's disastrous economic policies and forced conscription have contributed to economic stagnation and the growth of an illicit economy.<sup>34</sup> Nevertheless, with the conflict now entering its fifth year and some EROs coming under pressure by China to de-escalate, the period of high-intensity fighting may well soon come to an end. That raises key questions around domains that will shape the post-conflict

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1 The Irrawaddy. August 1, 2026. Myanmar junta announces martial law in resistance-controlled townships before election.

2 Reuters. January 19, 2026. ASEAN will not certify Myanmar election or send observers, Malaysia says.

3 Bissinger, Jared. March 11, 2025. Challenges and priorities for Myanmar's conflicted economy. ISEAS Fulcrum.

4 Win, Htet Hlaing. March 4, 2025. Myanmar's worsening human resource crisis. ISEAS Fulcrum.

path, including the possibility of an inclusive electoral democracy re-emerging, or the country's diverse ethnic and identity groups committing to peace and co-operation.

Understanding that potential post-conflict path is the task that this volume tries to tackle. In each chapter, contributors assess the most plausible scenarios and their relative likelihoods over the medium term (six to 36 months into a post-conflict state), also identifying the conditions that could alter dynamics and change the likelihood of the various scenarios.

As the contributors point out, multiple factors can influence the pathways to the scenarios—from the policies enacted by the post-election government to the military's relationship with key allies Russia and China. Among these factors, the relative power balance between the military and resistance groups will be pivotal in shaping the trajectory of the different domains. The power balance itself is largely a function of three overarching conditions: a stalemate between the military and resistance groups, the resistance gaining strength against the military, and the military gaining strength against the resistance. Based on the contributors' analyses, the sections below discuss the scenarios that could become more likely for each domain under the three conditions.

## **Stalemate Scenario**

In a stalemate scenario, low-intensity fighting between the military, PDFs, and EROs continues, with occasional high-intensity breakouts. Territorial control remains relatively stable, with only occasional and minor shifts in the frontlines. This describes the present conditions as of January 2026. Foreign involvement plays an important factor: for example, in the case of the Myanmar National Democratic Alliance Army returning control of Lashio, the military's regional headquarters, after intervention from China.<sup>5</sup> Political fragmentation also remains

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5 The Irrawaddy. April 19, 2025. MNDA hands Lashio back to Myanmar junta.

high in this scenario, with parts of the country's periphery divided into quasi-self-governed areas under the control of EROs.

**Institutions:** Both Military Consolidation and Negotiated Compromise are likely under this condition, depending on the nature of the stalemate. If resource constraints limit the ability by any of the major actors—the military, resistance groups, or EROs—to shift the power balance, territorial control would remain fragmented across the actors. However, the military would continue to maintain institutions that ensure its grip on power in the territories under its effective control, as other groups reject its legitimacy. A negotiated compromise could emerge if China becomes more involved or if the military faces a decline in its capacity to continue fighting. This would result in an institutional framework that shares power with more actors but remains fragile due to the lack of long-term mutual commitment.

**Identity:** Area-based Fragmentation is the most likely scenario under these conditions. Political fragmentation under stalemate would allow new forms of local governance to emerge in ERO-held areas. Unlike the pre-coup conflict, post-coup violence has triggered unprecedented levels of cross-ethnic co-operation among resistance forces, such as PDFs working with EROs or alliances between diverse civil society groups.<sup>6</sup> Such co-operation could facilitate the emergence of cross-ethnic local identities, although the scope of identity may not move beyond local co-operation, and it is unclear whether similar forms of local identities can emerge in military-held areas.

**Civil Disobedience Movement:** In this scenario, Parallel Systems and Hybrid Reintegration would be most likely. With the junta's attempt to exclude CDMers from gaining employment or accessing basic public services, CDMers would rely on alternative forms of support in resistance and ERO-held territories.

**Federalism:** Quasi-Autonomous Statelets are most likely to emerge under this condition. As EROs maintain control over their territories,

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<sup>6</sup> Israelsen, S. 2025. Repression and alliance formation: A gender(ed) approach to interethnic cooperation during conflict. *Global Society*, 1-21.

they pursue expansion in local administration and public services and assume state-like functions. However, the inability to build trust and co-operation would lead to continued political fragmentation.

**Civil-military Relations:** Fragmented Power is most likely. While urban centers are under military control, resistance groups and EROs would maintain their hold over rural areas and ethnic homelands.

**Economy:** Prolonged Instability is the scenario most likely to prevail under this condition. Labour outflows would continue due to the stagnant economy and conscription-related labour market disruptions, while the illicit economy would continue to flourish along the country's border areas. The result would be limited macroeconomic reforms, uneven development, and the survival of an illicit economy based on a continued state of conflict.

**Digital Integration:** Prolonged Marginalization is the most likely scenario. The lack of a cohesive effort towards digital integration would result in the country's exclusion from DEFA and limited growth opportunities for the digital economy over the medium and longer terms.

**International Relations:** Fragmentation is the most likely scenario under this condition. The military would be unlikely to gain widespread legitimacy from the international community, while EROs would struggle to work as a cohesive force to build relationships with international actors.

## **Strengthening Resistance Scenario**

Under this condition, resistance forces manage to further weaken the military with multi-front attacks, reversing some of the military's 2025 territorial gains, potentially regaining some of the momentum they found in the aftermath of the Operation 1027 coordinated offensives. This is currently unlikely given the military's successful conscription campaign and international support—particularly from China and Russia—as well as the greater level of fragmentation among resistance

forces. Should significant changes in any of those conditions occur, it is conceivable that the military is forced to make some concessions, opening space for a civilian government and ERO actors to influence the country's political future together.

**Institutions:** If Anti-Junta Forces manage to secure greater influence, they would attempt a comprehensive overhaul of Myanmar's institutions. As the resistance forces and EROs secure greater influence, they could pursue a political system that ensures institutionalized co-operation across ethnic lines while attempting to limit the military's role in politics.

**Identity:** Area-based Fragmentation remains most likely under this condition. While opportunities for local inter-ethnic co-operation would make room for new local area-based identities to emerge, it would not guarantee the emergence of a broader identity shared by diverse groups at the national level. Broader Integration remains less likely in the medium term since it would require a concerted effort to reconcile with the past and cultivate inter-ethnic trust and co-operation over the long term.

**Civil Disobedience Movement:** Parallel Systems and Hybrid Reintegration is most likely. Facing resource constraints and the challenges of communicating across numerous interest groups, there would be significant variations in CDM integration into local economic livelihoods. Overcoming such constraints would allow for Full Reintegration, whereby CDMers could participate in building a new civil service.

**Federalism:** Quasi-Autonomous Statelets remains the most likely scenario. While the resistance would strengthen relative to the military, that would not guarantee that a Decentralized Federalism is instated, as creating robust power-sharing mechanisms would require a meaningful decentralization of power and a credible mutual commitment of willingness to be constrained by institutions.

Civil-military Relations: Fragmented Power is the likeliest scenario. While the traditional military's power would be weakened, resistance groups and EROs would be unable to form a cohesive armed organization, making civil-military relations dependent upon individual fighting forces and the local communities where they are located.

Economy: Prolonged Instability remains most likely. Although the military's power is weakened, instability could emerge from political uncertainty, there would be a struggle for power between EROs and resistance groups, and there would be a lack of cohesive economic policy at the national level. The conflict-based illicit economy would continue to play a dominant role under this scenario. If the obstacles to forming a cohesive governing authority could be overcome, it could enable a move towards economic reforms and a restoration of confidence in financial institutions, making Protracted Recovery the most likely scenario.

Digital Integration: Prolonged Marginalization is most likely under this condition. Without a cohesive actor to engage with digital integration, Myanmar would not sign DEFA and participate in the region's digital economy. Post-conflict coordination between the diverse actors would be essential to the pursuit of Gradual Reintegration.

International Relations: Fragmentation remains most likely under this condition. Unless there is a targeted group effort to build a cohesive international representation, international actors would struggle to effectively engage with numerous groups with diverse and conflicting interests. However, restoration of central authority and cohesive international representation under a federal democracy would allow for Internationalization, including the possibility of balanced foreign relations and a transition from aid reliance towards foreign investment.



## Strengthening Military Scenario

Under this condition, the military succeeds in further subduing the EROs and resistance groups through a campaign of sustained state violence. As the military's control over the country expands, the resistance would weaken and become more fragmented. The military would continue to lead in shaping key political institutions in its favor, limiting opportunities for meaningful reform that could reduce the likelihood of future conflict.

**Institutions:** Military Consolidation is, under this condition, the most likely scenario. If the military controls most of Myanmar's territory, it would not be incentivized to pursue substantial reforms, but rather would maintain the institutions that best secured its dominance and that of its proxy party (the Union Solidarity and Development Party, or USDP) under the guise of electoral democracy, effectively foreclosing a future for inclusive and participatory democracy.

**Identity:** Given the weakening of the resistance movement, the lack of opportunities for cross-ethnic cooperation, and the military's control over larger territories, Traditional Fragmentation is the most likely scenario under this condition. Furthermore, the military's reliance on Bamar-Buddhist ideology to legitimize its rule, along with continued state repression of any nascent resistance, would further alienate the non-Bamar ethnic groups and exacerbate inter-ethnic relations.

**Civil Disobedience Movement:** Facing military repression and a policy of punishing CDMers, Long-Term Marginalization is most likely, limiting the opportunities for CDMers to pursue employment and economic opportunities and rebuild their lives.

**Federalism:** Unstable Crony Federalism is the most likely scenario under this condition. Asserting control over most of the territories, the military would continue to have control over urban areas and strategic border corridors, while EROs and resistance groups would remain fragmented and unable to challenge the military's capacity for state violence. This would result in a patchwork of administration,

whereby the military remains the dominant political force and seeks legitimacy from ERO leaders bilaterally and offers economic rents in a fashion similar to the pre-coup period.<sup>7</sup>

**Civil-military Relations:** Most likely under these conditions would be a scenario of Military-led Politics. The military's continued dominance means there will be little incentive for reform, maintaining its control and repression through the USDP. Some border regions could still serve as ERO strongholds, maintaining a fragile ceasefire with the military.

**Economy:** The junta's damaging economic policies, from import restrictions to conscription, make Painful Crisis the most likely scenario. A continually weakening economy and worsening humanitarian situation for much of the population would result in a stronger shift toward a conflict-based illicit economy.

**Digital Integration:** Gradual Reintegration is possible under the scenario, as the military would seek to participate in DEFA. However, political uncertainty, control over internet data flows, and continued tensions with civilians over fears of digital-based political mobilization would slow economic integration.

**International Relations:** Isolationism remains the most likely scenario. While the military is the dominant force, authoritarian entrenchment further alienates the country from the West and most regional actors, rendering it increasingly dependent upon authoritarian allies such as China and Russia.

## **Potentially Persisting Features of Myanmar's Future**

Focusing on the post-conflict dynamics of key domains is essential in order to understand the potential pathways for Myanmar's political development, whether it be the potential for broader cross-ethnic

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<sup>7</sup> Bertrand, J., A. Pelletier, and A.M. Thawngmung. 2022. *Winning by process: The state and neutralization of ethnic minorities in Myanmar*. Cornell University Press.

identity that has been absent throughout the country's history, or the challenges faced by those aspiring to build an inclusive electoral democracy that will constrain the military's role in politics. However, they also reveal two key factors that may persist in Myanmar's political future: a likely persistence of political fragmentation and the links between key political actors and conflict-based economy.

First, political fragmentation remains the most significant challenge regardless of the power balance between the military and resistance forces. The fragmentation stems from the historical lack of a uniting cross-ethnic identity (see "Identity" chapter) and the decades of state violence against non-Bamar ethnic groups, due to the military's perceived notion of itself as the sole protector against secession by ethnic groups and the dissolution of the union (see "Civilian-military relations" chapter). The post-coup conflict has further strengthened this fragmentation as areas of self-governance by EROs emerged, with their administrative functions expanding to raising fiscal revenues, addressing humanitarian needs, and providing social services to communities within their territories of control. The fragmentation has also imposed challenges for the international community to engage with the country's numerous actors with conflicting interests and aspirations (see "IR" Chapter).

This special issue does not aim to make a normative claim as to whether political fragmentation is a better path for Myanmar's democratic future over a federalized state with an overarching cross-ethnic identity. However, if the question is which conditions are required for a federalized state to become a possibility, the right institutions are paramount: Myanmar needs credible mechanisms that ensure power-sharing between the core and the periphery, as well as mechanisms that durably constrain the military's role in politics (see "Institutions" and "Federalism" chapters).

Second, the post-coup civil war has further fueled the conflict-based informal economy, which predates the coup but has now grown to an unprecedented scale. That growth was fueled by the military's

detrimental policies, which have led to prolonged economic crisis, underinvestment in critical infrastructure, and large outflow of human capital (see “Economy” Chapter.) Additionally, groups such as the Civil Disobedience Movement were especially targeted by the military as retribution for their involvement in the resistance, creating dire challenges for their economic livelihood and hollowing out the capacity of many critical sectors (see “Civil Disobedience Movement” Chapter). The nascent digital economy has also suffered from setbacks due to government restrictions, leading to the country’s marginalization from the region’s digital economy boom (see “Digital integration” Chapter). The growing conflict-based economy has also become intertwined with the military and certain other actors, as they increasingly depend on illicit economy to fuel their fight for territorial control.<sup>8</sup>

Illicit trade from the conflict economy, whether in the form of drug trade or cyber scams, imposes significant economic and human costs for Myanmar’s people and others abroad; there is no guarantee that it will decline in importance or scale after the end of conflict, especially if key actors involved in illicit economy also secure key political positions. A transition out of the conflict economy will therefore require mutual commitments from post-conflict actors, the recovery and expansion of formal sectors, investments in human capital, and cooperation between domestic and international actors to target groups continuing to engage in the illicit economy.

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8 Alastair MacBeath. 2025. Cashing in on conflict: Illicit economies and the Myanmar Civil War. Global Initiative against Transnational Organized Crime.

# Contributor Bios

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**Kai Ostwald** is the Director of the Institute of Asian Research at the University of British Columbia, where he is also HSBC Chair and Associate Professor at the School of Public Policy & Global Affairs and the Department of Political Science. His academic work includes a focus on political institutions and democratization in Southeast Asia. He regularly works with stakeholders in government and civil society, and is a senior fellow at the Asia Pacific Foundation of Canada and the ISEAS Yusof Ishak Institute in Singapore.

**Myo Min Aung** is a PhD candidate and public policy scholar at the School of Public Policy, Chiang Mai University. His research explores the intersection of public policy and digital technologies. He writes on digital politics and the broader societal impacts of technology, including its influence on war, economy, politics, and other socioeconomic aspects.

**Napas Thein** is a public policy professional and Myanmar Policy and Community Knowledge Hub Research Fellow. He holds a Master of Public Policy from the Munk School of Global Affairs & Public Policy at the University of Toronto. In 2024, he was a Research Fellow with the UBC Myanmar Initiative, conducting field research in Thailand on the situation in Myanmar, on-the-ground actors, and cross-border dynamics. He works closely with the Burmese Canadian diaspora on research, advocacy, and community-led initiatives, with interests spanning geopolitics, migration, and conflict-sensitive policy. He is also an Asia-Pacific Young Professional Fellow with the Asia Pacific Foundation of Canada.

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**Ngwe Min Tar Yar** (alias) is an independent social researcher specializing in the evaluation of social development interventions in Myanmar. He earned an Executive Master of Development Studies from the Yangon University of Economics (2020) and participated in an academic exchange at the University of British Columbia in 2019 under the Master of Public Policy and Global Affairs program. His research interests include natural resource management, minerals policy, federalism, social development, and institutional capacity.

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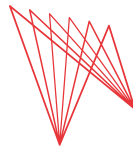
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