



Global Safety and Security (GSI)

RISK SCENARIO

MYANMAR

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GLOBAL SECURITY INTELLIGENCE

OVERVIEW

Myanmar (Burma) is currently experiencing a major civil war, resulting in massive internal and external refugee flows.





Although **Airbnb** does not currently operate in Myanmar, it is a potential future market for both short term rental and Airbnb.org operations.

GSI has identified and critically assessed a range of country-specific risk scenarios and their potential security impact for **Airbnb** in 2024.

RISK SCENARIO CONTENT

THIS REPORT INCLUDES #4 RISK SCENARIOS

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GLOBAL SECURITY INTELLIGENCE GLOSSARY

BGF

Border Guard Force, which are former ethnic militias which have agreed to be under the Tatmadaw command in exchange for business opportunities and the ability to engage in criminal activity.

ethnic militia

Armed groups claiming to represent Myanmar's numerous ethnic minorities. Ethnic militias often control territory and may or may not actively oppose the SAC and Tatmadaw.

NUG

National Unity Government; the government in exile formed by members of Myanmar's parliament who were ousted during the Tatmadaw 2021 *coup*.

LDF

Local Defense Force; armed groups which oppose the SAC and Tatmadaw, and operate autonomously.

PDF

People's Defense Force; generally larger armed groups affiliated with the NUG which oppose the SAC and Tatmadaw.

SAC

State Administration Council; the military junta formed in the wake of the Tatmadaw 2021 *coup*.

Tatmadaw

Myanmar's military, which overthrew an elected civilian government in a 2021 *coup* and has sought to rule through the SAC. The Tatmadaw has a long history of coups, military rule, and business dealings.

EXECUTIVE SUMMARY

AIRBNB

RISK SCENARIOS

- GSI has identified the formation of an SAC rump state as the most likely risk scenario in 2024, followed by an SAC internal coup.
- An SAC collapse or insurgency meltdown are unlikely but would present major transnational implications.

IMPACT ON AIRBNB

- **Airbnb** does not currently operate in Myanmar, but the risk scenarios mentioned in this report could determine the viability of future business operations. In addition, several risk scenarios could significantly influence crossborder refugee flows and narco trafficking activity.





SAC RULED RUMP STATE

SUMMARY

The Tatmadaw (army) has experienced major battlefield losses since October 2023; however, retains overwhelming air and artillery superiority.

Meanwhile, insurgents have experienced repeated delays and setbacks while attempting to capture medium- to large-sized towns in Myanmar.

RISK SCENARIO ONE

INDICATORS

Tatmadaw retains control of major cities facing insurgent offensives.

Tatmadaw consolidates forces in major cities and effectively uses air and artillery support to blunt insurgent offensives.

Insurgents pause attacks on major towns and cities after experiencing heavy casualties.

Ethnic militias end offensives without expanding out of areas populated by their own ethnic group.

SAC effectively reasserts control in areas recently lost to insurgent control.

Key ethnic militias resume a ceasefire with the SAC.

RISK EVENT LOCATION

LOCATION

A rump state ruled by the State Administration Council (SAC) junta would likely be focused on major cities in ethnic Bamar areas such as Naypyidaw, Yangon, and Mandalay, along with adjacent rural areas and major highways connecting these cities.

The Tatmadaw would likely retain control of cities hosting regional military commands as well (such as Taunggyi) as the ability to move supplies to them.

Ethnic militias and People's Defense Force (PDF) units associated with the opposition National Unity Government (NUG) would retain control over border areas and rural areas, stage attacks in major cities, and contest for control of key highways.

RISK LIKELIHOOD MEDIUM-HIGH

POTENTIAL IMPACTS

Continuing sporadic refugee flows into Thailand and India, along with high levels of illegal immigration.

Ongoing internal displacement in multiple states/regions.

Continuing labor, sex, and forced marriage trafficking to [China](#) and Malaysia.

[Liberation](#) of trafficked foreign nationals held in [criminal zones](#) controlled by pro-SAC border guard forces.

Growing poverty and malnutrition.

US/EU sanctions would remain in place for the foreseeable future.

Impacts to methamphetamine production will be mixed. Opium production will [rise](#).



SAC INTERNAL COUP

SUMMARY

The Tatmadaw has historically cultivated extreme loyalty towards the institution of the army and senior commanders.

However, continuing battlefield losses, leadership purges, and an inability to pay troops could strain loyalty to the breaking point.

The removal of hardline leaders such as SAC chief Min Aung Hlaing could potentially facilitate peace negotiations with the NUG and insurgent groups.

RISK SCENARIO TWO

INDICATORS

Sudden, extended disappearance of Min Aung Hlaing and other key SAC leaders.

State-controlled media outlets going off the air or changing regularly scheduled programming.

Continuous purges affecting senior ranks of the Tatmadaw and SAC.

Unexplained troop movements around Naypyidaw and other major cities/regional commands.

RISK LOCATION EVENT

LOCATION

An internal *coup* would likely manifest in the garrison capital Naypyidaw, where the majority of senior SAC and Tatmadaw leadership are concentrated.

Alternatively, Tatmadaw commanders at regional military command headquarters could break with the SAC and negotiate with insurgents.



RISK LIKELIHOOD LOW-MEDIUM

POTENTIAL IMPACTS

Potential decrease in internal displacement and refugee flows to Thailand and India if a ceasefire and lasting peace are achieved.

Potential decrease in illegal migration and human trafficking if peace results in a resumption of economic growth.

US/EU sanctions relaxation would likely hinge on a peaceful transition of power to a NUG-led opposition government.

Potential decrease in methamphetamine and opium production if peace negotiations cause the Tatmadaw to cut ties with militias and BGFs.



STATE ADMIN. COUNCIL COLLAPSE

SUMMARY

A complete collapse of the SAC's governance remains unlikely given its powerful combat capabilities and control of energy exports.

However, a complete collapse of SAC authority would likely see the NUG establish a federal system of governance and fundamentally restructure the Tatmadaw, while ethnic militias are given wide latitude to govern areas under their control.

The NUG would also arrest former SAC officials in preparations for war crimes trials, causing them to flee.

RISK SCENARIO THREE

INDICATORS

Foreign exchange crisis which leaves the SAC unable to import fuel, munitions, or other critical goods.

Continued serious battlefield reverses (such as the loss of a divisional HQ or major city such as Mandalay).

Major Tatmadaw defections or surrenders (brigade level or higher).

Growing efforts to forcibly enlist new recruits, or to induce defectors/deserters to rejoin.

Complete withdrawal of Chinese or Indian support for the SAC.

RISK EVENT LOCATION

LOCATION

A SAC collapse would have nationwide implications, with security implications particularly acute in Naypyidaw and towns viewed as strongholds of SAC support in Sagaing and Mandalay regions.



RISK LIKELIHOOD LOW

POTENTIAL IMPACTS

SAC supporters will flee the country. Overall internal displacement and international refugee flows would decrease, and human trafficking victims would be released from border enclaves.

The United States and EU would relax sanctions and provide humanitarian and financial assistance to the NUG.

Potential for a near-term spike in crime (including arms trafficking and narco trafficking) as the NUG attempts to establish a working government.

Impacts to methamphetamine production will be mixed. Opium production will decrease.



INSURGENCY MELTDOWN CHALLENGES

SUMMARY

The NUG and powerful ethnic militias have sustained an effective working relationship. Similarly, the NUG has avoided major challenges to its authority from loosely controlled PDFs and local defense forces (LDF).

However, Chinese pressure and/or differing objectives could cause rifts in this relationship, particularly as the SAC weakens and insurgent groups begin to conquer cities and govern Myanmar. In the near term, it remains unlikely that multiple major ethnic militias will enter a lasting ceasefire and cut ties with the NUG/PDFs, but this would severely weaken the insurgency.

RISK SCENARIO FOUR

INDICATORS

Increasing clashes between PDFs and ethnic militias or independent LDF units

Ethnic militias deciding to halt training and weapons shipments to PDFs

China cuts off border trade, arms shipments, and other aid to key ethnic militias seeking to expand into ethnic Bamar areas

NUG attempts to arrest and convict LDF or ethnic militia cadres for alleged war crimes, or vice versa

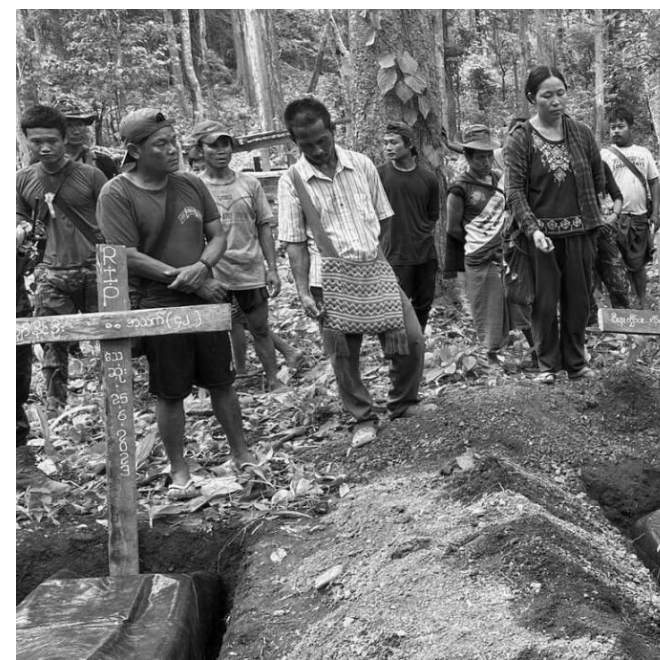
NUG reversal of its decision to implement a federal, multiethnic government in place of the current unitary, Bamar-dominated government.

RISK EVENT LOCATION

LOCATION

Breakdowns in NUG-ethnic militia relationships which severely impact the insurgency could manifest in Kachin, Kayin, Kayah, Shan, and Rakhine states.

Breakdowns between the NUG and PDFs could occur in Sagaing or Magwe regions.



RISK LIKELIHOOD VERY LOW

POTENTIAL IMPACTS

Decreased refugee flows and internal displacement in areas where insurgents have concluded ceasefires with the SAC.

Major fighting between ethnic militias (and possibly PDFs) would drive localized refugee flows.

Increase in illegal migration and human trafficking to SE Asia and China.

Continuation of existing US/EU sanctions for the foreseeable future.

Methamphetamine production will remain elevated, while opium production will continue to rise.