Labor Unions and Pro-Democracy Resistance

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September 6, 2026

Abstract

Democracies are backsliding across the developing world, making it essential to understand which institutions help resist authoritarian reversals. This paper asks whether, and how, labor unions contribute to pro-democracy resistance, using Myanmar's 2021 coup as a high-stakes, data-rich setting. The two largest union federations' Facebook communications shifted from workplace concerns to political resistance and grew more confrontational after the coup. Combining a pre-coup survey of 1,104 garment workers with political-prisoner records and township-level data on unions, protests, and armed conflict, we find that townships with higher pre-coup union presence saw more civilian collective action after the coup and, with a lag, more state repression. At the individual level, arrest—our main measure of costly participation—falls disproportionately on union presidents, though leadership traits explain almost none of who is arrested. Pre-coup organizational capacity instead predicts arrest, conditional on individual traits and leader quality; leader arrests also spill over to coworkers, including nonmembers, tracking capacity rather than the leader's own quality. A simple model rationalizes these patterns as leaders investing in their organization's coordination or credibility. Unions' organizational infrastructure, built during ordinary workplace bargaining, can become a resource for resisting repression.

Keywords: labor unions; democratic resistance; collective action; organizational capacity; military coups; Myanmar.
JEL Classification: D74; J51; M5.

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1 Introduction

Understanding whether and how civil society institutions help societies resist or recover from democratic backsliding is a long-standing question. Figure 1 shows that countries with denser labor union movements tend to have stronger civil society, higher democratic quality, fewer coup attempts, and a lower risk that a coup succeeds in installing lasting autocracy. This empirical pattern is consistent with a long scholarly tradition in political science and sociology arguing that labor unions contribute to democratization and strengthen democratic performance (Payne, 1991; Rueschemeyer, Stephens and Stephens, 1992; Collier and Mahoney, 1997; Neureiter, 2013; Adler and Webster, 1995; Lee, 2007; Usmani, 2018).

Yet, this evidence is difficult to interpret on its own. The largely case-study-based political science literature is unevenly distributed and contains many accounts of unions backing authoritarian regimes or not fully supporting democracy (Valenzuela, 1989; Bellin, 2000, 2002; Levitsky and Mainwaring, 2006). The cross-country correlations, moreover, could reflect omitted variables—such as development, education, social capital, or historical institutional trajectories—that explain both union presence and democratic outcomes. And given the dramatic weakening of labor unions across OECD countries over the past nearly 50 years, even scholars who argue that unions have historically played an important role express skepticism that they do so today (Ahlquist and Ntounias, 2026).

Does organized labor, in fact, convert civil society into democratic resistance, and if so, through what mechanisms? To answer these questions, we examine labor unions' role in the pro-democracy resistance following Myanmar's February 1, 2021 military coup. Myanmar is an intrinsically interesting setting: union leaders and federations faced life-threatening costs for resisting the coup—arrest, torture, and death—so that the resistance we observe reflects a high-stakes, costly choice. Moreover, we are able to assemble rich data infrastructure: a pre-coup survey of 1,104 garment workers spanning the union hierarchy, from presidents to non-members (Boudreau, Macchiavello, Minni and Tanaka, 2025a); arrest and killing records documenting 30,908 political prisoners across the country; township-level union and factory data; protest event records; and public communications from union federations. The data allow us to measure granular organizational features of unions—strike history, meeting frequency, com-

munication practices, and social networks—before they faced the repression shock, alongside pre-coup personality assessments for individual workers that let us distinguish organizational effects from individual selection into resistance.

We begin by examining how unions' strategy positioning shifted in response to the coup. We analyze 1,522 Facebook posts published by the two largest union federations between January 2020 and June 2021. Using unsupervised machine learning analysis that captures semantic meaning rather than word co-occurrence alone, we document a goal reorientation immediately following the coup: the federations shift from labor-focused vocabulary—including workers, factories, wages, social security, workplace conditions, and violence against women—to pro-democracy resistance—including democracy, the Civil Disobedience Movement (CDM), military dictatorship, human rights, and the National Unity Government (NUG).[1] Their strategic posture shifts from an even mix of accommodating and confrontational posts to almost exclusively confrontational ones. This provides direct evidence that unions did not merely operate alongside the resistance; they deliberately repositioned themselves as part of it.

Next, we ask whether unions mobilized participation in the pro-democracy resistance. We conduct a township-level event study, comparing post-coup protest activity in townships with higher versus lower pre-coup garment-sector union presence in the Yangon Region.[2] We find that townships with stronger pre-coup union presence experienced significantly higher levels of post-coup civilian collective action and state-supplied repression. The magnitude is substantial: townships with garment-sector unions experienced nearly double the civilian collective action events of townships without them at the post-coup peak, one month after the coup, and civilian collective action remained relatively elevated in these townships for four months. State-driven armed violence also increased significantly in these townships, though with a lag, consistent with repression responding to the wave of mobilization it followed.

[1] The CDM is the nationwide nonviolent resistance movement that emerged after the military coup. The NUG is the government-in-exile of Myanmar formed by a group of elected lawmakers and members of parliament ousted in the 2021 Myanmar coup.

[2] Yangon Region concentrates Myanmar's industrial base and its union movement: 83% of industrial-sector unions and 82% of industrial-sector members affiliated with the Confederation of Trade Unions of Myanmar (CTUM) as of 2019 were based in Yangon, implying a union density among the region's roughly 312,000 factory workers of at least 3.5%, a conservative lower bound given that CTUM represents only about 9% of the country's roughly 300,000 union members nationwide.

Together, these first two facts establish that, in this setting, unions were heavily implicated in mobilizing resistance to the coup—evidence that the cross-country correlation between union density and democratic resilience does not simply reflect confounding factors. They leave open, however, *how* unions did so: whether by mobilizing people who would otherwise not have taken to the streets, or simply by comprising people who were already the most likely to protest regardless of the union.

We distinguish three ways in which unions could matter for democratic resistance: selection, charistmatic leadership and organizational capacity. Under a *selection* channel, unions matter only because of who they attract, whether among the rank and file or in the leadership itself. Under a *charismatic-leadership* channel, unions matter because whoever happens to become their leader is an unusually able or charismatic individual whose own quality draws followers into the resistance, largely independent of the strength of the organization she leads. Under an *organizational-capacity* channel, unions matter because of what they do: they build coordination, communication, and trust that convert a given level of latent support, in members and leaders alike, into actual participation.

We evaluate these three possibilities directly against the data by linking individual pre-coup survey responses to post-coup arrest records—our main observable measure of costly participation.[3] First, ordinary union membership offers a test of selection: line leaders and rank-and-file members, who together vastly outnumber presidents, show no higher arrest rates relative to non-union workers in the same factory, in any specification. Repression instead falls disproportionately on union presidents, but not for the reasons a selection or charismatic-leadership channel would predict: personality and other psychological traits, cognitive ability, and demographics explain 35% of the variation in who becomes a leader but only 2% of the variation in who is arrested.

Instead, what predicts mobilization is a pre-coup index combining several measures of organizational capacity.[4] Workers in factories with higher organizational capacity have 21–32% higher arrest frequencies following the coup, even controlling for a rich set of individual traits and for president quality, which on its own does not

[3] In Section 6, we provide evidence in support of this interpretation leveraging the timing and location of protest activity.

[4] The measures are: union membership share, mobilization rates around minimum wage campaigns, meeting attendance, member consultation, and leader communication effectiveness.

predict mobilization.[5]

Second, leader arrests also spill over along the union's chain of command: a president's arrest increases the probability of arrest for the line leaders and members below her, and a line leader's arrest increases the probability of arrest for the workers on her own line, including workers who are not themselves union members—which rules out an account in which the regime is simply working down a membership list obtained from an arrested leader. This pattern is, on its own, equally consistent with organizational capacity and with charismatic leadership; but we find it tracks the former, with a substantially larger effect in high-capacity factories and no comparable difference by president quality.

Taken together, our results point to organizational capacity, rather than who joins or leads a union, as what converts unions into vehicles of resistance. In Section 7, we develop a simple model that rationalizes these patterns: a leader's investment in her organization—either in members' ability to coordinate or in her own credibility—can generate the link we document between organizational capacity, mobilization, and repression spillovers.

Our findings contribute to understanding democratic vulnerability in developing democracies. They suggest that the institutional architecture of civil society during "normal" times—the organizational practices, networks, and communication structures developed during periods of institutional openness—determine capacity for collective resistance when democracy faces threats. This has policy implications for countries experiencing democratic backsliding: protecting space for civil society organization and supporting union organizing and capacity-building can become instruments for democratic resilience.

This paper contributes to three literatures. First, we extend research in political economy and political science on labor movements and democracy (Ahlquist and Ntounias, 2026; Yan, 2025; Ahlquist and Levi, 2013; Ahlquist, 2017; Kaplan and Naidu, 2025). In contrast to an established political science literature on the topic, economics has left unions' role in politics largely unaddressed (Kaplan and Naidu, 2025). Moreover, the existing literature in political science is largely qualitative and does not em-

[5]We measure leadership quality as in Boudreau, Macchiavello, Minni and Tanaka (2025b): by revealed preference, union members find traits differentially associated with presidents to be important for leadership ability, so we predict the probability of being a union president from a probit model with personality and other psychological traits, cognitive ability, and demographics.

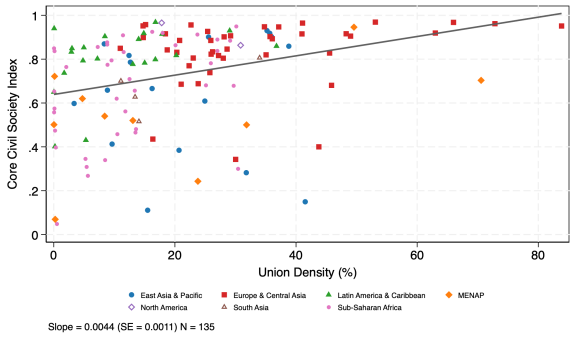
phasize causal identification.[6] We contribute novel micro-evidence that a small but growing labor movement substantially increased pro-democracy mobilization in the aftermath of Myanmar's 2021 coup. We isolate organizational infrastructure as a key mechanism, showing that unions matter not only because they attract charismatic leaders but because they build coordination capacity that can be mobilized for collective action under severe repression.

Second, we contribute to scholarship on the determinants of protest participation (McCarthy and Zald, 1977; Klandermans and Oegema, 1987; Cantoni, Yang, Yuchtman and Zhang, 2019; Enikolopov, Makarin and Petrova, 2020; Bursztyn, Cantoni, Yang, Yuchtman and Zhang, 2021). We document how organizational membership and pre-existing organizational capacity shape costly political participation. Our findings extend individual-level determinants of protest (grievances, identities, networks) by showing that institutional context—specifically union organizational capacity—exerts independent effects on mobilization.

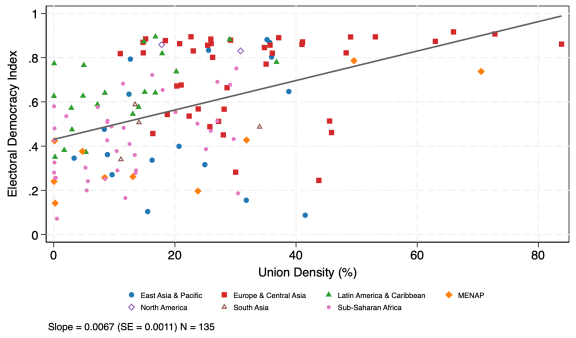
Third, we add to the literature on the determinants of democratic quality by providing micro-foundations for the macro correlation between union density and democratic outcomes (Paxton, 2002; Haggard and Kaufman, 2021). We find that unions build organizational structures during periods of political opening that can subsequently be mobilized to resist democratic reversals.

The remainder of this paper is organized as follows: Section 2 describes the pre-coup context and the coup itself, and Section 3 details our data. Section 4 discusses *why* unions may have reoriented from labor organizing to resistance and documents unions' strategy reorientation toward resistance, and Section 5 shows that union presence increased local mobilization and repression following the coup. Section 6 turns to mechanisms, and Section 7 develops a model that rationalizes these results. Section 8 concludes.

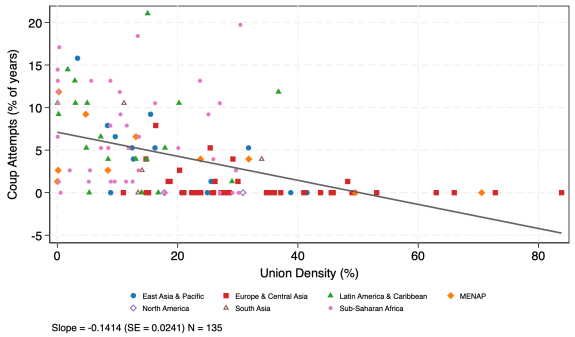
[6] As an exception, Yan (2025) uses a generalized differences-in-differences design to show that gaining union membership does not affect American workers' political views or participation.



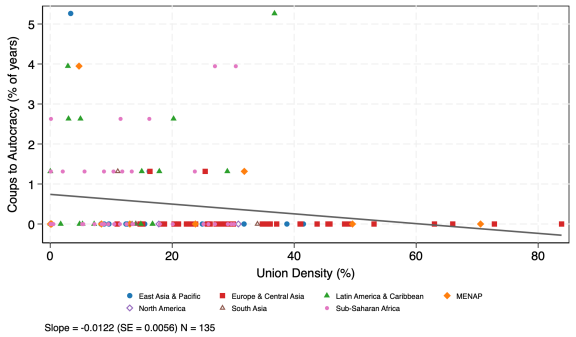
Civil society index (+)



Electoral democracy (+)



Coup attempts (−)



Coup → autocracy (−)

Figure 1: Union Density and Cross-Country Political Outcomes

Notes: Unit of observation is country. Each marker is one country, coloured by World Bank region; the line is an unweighted OLS fit with no controls, and each panel reports its slope, standard error and sample size. Union density is the percentage of employees who are trade union members, averaged over all available years, taken from the OECD-AIAS ICTWSS database where available, from ILOSTAT where it is not, and from the World Bank Enterprise Surveys otherwise. The two upper panels use V-Dem indices averaged over 2000 and later: the core civil society index and the electoral democracy index, both bounded between zero and one. The two lower panels use the Bjørnskov-Rode integrated dataset: *coup attempts* is the share of a country's years with at least one coup attempt, successful or not, and *coup to autocracy* the share of its years with a successful coup that moved the country from democratic to nondemocratic. Both are expressed in percentage points. The sample is the set of countries observed in both the union and the outcome source.

2 Context

2.1 Unions in Myanmar

Figure 2 displays key events in Myanmar's labor movement. Trade unions were illegal while the country was under one-party, military-led state rule from 1962-2011. The military government legalized independent trade unions in 2011 as part of a broader liberalization of the political system (The Labor Organization Law, 2011). Between 2011 and 2020, the number of unions grew rapidly. According to the Ministry of

Labour, Immigration and Population, as of mid-2020, there were 2,861 registered trade unions.[7] We study unions in Myanmar's export-oriented garment sector, which was the largest exporting industrial sector in Myanmar with approximately 600 factories employing nearly 500,000 workers as of 2020 (Myanmar Garment Manufacturers Association, 2020).

Under the Myanmar Labor Organization Law (2011), any group of 30 or more workers can form an establishment or factory-level union. Most of these unions are affiliated with a national-level union federation that coordinates activity across affiliates: they train factory-level leaders, provide legal and organizational assistance, represent affiliate interests in national policy forums such as minimum-wage setting, and act as the conduit between local unions and the country's international labor counterparts.

The Confederation of Trade Unions in Myanmar (CTUM) is the largest such union federation in Myanmar. In 2015, it was officially recognized as the only national-level trade union confederation, marking a significant phase in Myanmar's labor movement. As of late 2019, there were 47 garment factories that had a factory-level union affiliated to the CTUM, representing 10% of the garment sector and 58% of unions in the industrial sector affiliated to the CTUM.

To form a union, members elect a union's Executive Team (ET), which is lead by a president and also includes a secretary, a treasurer, and four other elected members. The Law prescribes that elections are held every two years, and there was no term limit. Below the ET, line/team leaders (LLs) facilitate communication with workers. LLs are not elected but are instead recommended by union members (66%), selected by the ET (24%), or self-nominated (10%). See Boudreau et al. (2025b) for more details on the roles of union leaders in their unions.

Following the coup on February 1, 2021, the CTUM and other trade union federations quickly mobilized against the military. On 8 February, the CTUM led the country's first general strike after the coup, and union members and leaders across the country subsequently organized and joined large-scale strikes and protests (Lin, 2021). On 26 February, the military declared most of the country's labor unions illegal; as of mid-2026, the 2011 Labor Law is still on the books, but trade union activity remains effectively criminalized (IndustriALL Global Union, 2026). Section 2.2 further

[7] These consist of 2,683 basic organizations, 147 township organizations, 22 state/regional organizations, 8 federations, and 1 confederation.

discusses the military's post-coup repression of labor unions and organizers.

2.2 Myanmar's political system and the coup

Myanmar has a fragile and relatively recent history of democracy, which is detailed in Figure 2. Ruled as a single-party, military-led state from 1962 to 2010, 2011 marked the beginning of nominal civilian rule and steps toward democratization. This halted on February 1, 2021, when the military overthrew Myanmar's democratically elected National League for Democracy (NLD) government.

Garment sector unions were at the vanguard of the civilian response:

> *"Workers and unions are the main force of the movement in Yangon [the country's largest city]. Because there are many thousands of workers from the factories, their gatherings in the street are going to get a lot of attention from the people. They are taking a lot of risks to take this kind of action, many of the labor leaders have been fired before. They have been oppressed by the government and factory owners. They are very vulnerable but they are very dedicated."* (labor leader and human rights activist) — Source: Lin (2021), *Labor Notes*, February 26, 2021.

In coverage by *The New York Times*, union leaders described their decision to act:

> *"We started the protests...and came out on the streets early and set a good example for other people across the country."* (union leader)
> *"We can't accept this, even if it means risking arrest or death. It's for me, my family, my union colleagues and all the people of Myanmar."* (union leader)
> — Source: Paton (2021), *New York Times*, March 12, 2021.

These actions helped spark the nationwide nonviolent resistance movement that emerged after the military coup, including organizing protest activities, known as the Civil Disobedience Movement (CDM).

The junta met this movement with sweeping repression. Figure 3 displays the dramatic increase in political violence in the years following the coup relative to those preceding it. This included severe repression of organized labor and its leaders – beyond banning nearly all labor organizations, for example, it issued arrest warrants for the

entire leadership of the CTUM, declared their passports invalid, ransacked their headquarters, and violently retaliated against their family members (Aung, 2024). Contemporary reporting and accounts by union leaders capture the risks they knowingly accepted, as well as the prices many paid, including torture and killing (Duncan, 2024; Progressive Voice, 2025).

Figure 2: Myanmar's political and labor history, 1948–2026

Politics and the state	*Labor law and unions*
1948–1962 *Parliamentary democracy*	
4 January 1948: U Nu becomes Prime Minister as Burma wins independence from Britain	Trade unions operate legally: the All Burma Trade Union Congress (1940) and the Trade Union Congress (Burma) (1945). The ABTUC leads general strikes in 1946 and 1948, and is banned shortly afterward as the government suppresses the Communist Party
1958–60: Military "caretaker" government under General Ne Win, after a split in the ruling AFPFL. U Nu's faction wins the 1960 election. His push for Buddhism as the state religion and his leniency toward separatists anger the military	Earlier, the 1938–39 oilfield strikes had grown into the "1300 Revolution", a general strike central to the independence movement
1962–2011 *Single-party rule under the military*	
2 March 1962: Ne Win ousts U Nu in a coup, ends federalism, takes the economy into state hands and leaves the BSPP as the only lawful party	**1962**: Independent trade unions suspended
1974: A new constitution shifts formal authority from the army to a People's Assembly, still chaired by Ne Win	**1964**: Law Defining the Fundamental Rights and Responsibilities of the People's Workers imposes a single, compulsory system of worker representation
1988: Mass protests topple Ne Win. The army suppresses them, killing thousands, and installs a new junta (SLORC). Aung San Suu Kyi founds the NLD in September	
1989: Martial law is imposed and thousands detained; Burma becomes Myanmar; Aung San Suu Kyi is confined to her home	
1990: The NLD wins 82% of seats in a general election; the junta refuses to hand over power	
2007: Fuel subsidy cuts set off protests that Buddhist monks come to lead (the "Saffron Revolution"); scores die and thousands of monks are detained	
2008: A constitution is approved by referendum days after Cyclone Nargis, reserving 25% of parliamentary seats for the military	
2010 (Nov): The first vote in two decades, claimed by the military's USDP amid opposition allegations of widespread fraud. The NLD boycotts; Aung San Suu Kyi is freed seven days later	
2011–2021 *Nominal civilian rule; fragile democratization*	
30 March 2011: Thein Sein becomes president; his government is civilian in name, and reforms follow	**11 October 2011**: Labour Organization Law (No. 7/2011) legalizes unions for the first time since 1962 and repeals the Trade Unions Act 1926
	2012: Settlement of Labour Disputes Law
2015 (Nov): The NLD wins the general election	**2013–15**: Minimum Wage Law, then the first national minimum wage at MMK 3,600/day
2016: Htin Kyaw becomes president in March; Aung San Suu Kyi becomes State Counsellor in April, and de facto head of government	**2018** (May): Minimum wage raised to MMK 4,800/day
2016–17: Military operations in Rakhine; more than 730,000 Rohingya flee to Bangladesh in 2017 as a result; a 2018 UN report alleges genocide	**2019**: Garment-sector strike wave
2020 (Nov): The NLD wins again; the military alleges electoral fraud	**2020** (Mar): Myan Mode garment factory dismisses 520 union members
2021– *Military rule and civil war*	
1 February 2021: **COUP**. A state of emergency is declared, power passes to army chief Min Aung Hlaing and Aung San Suu Kyi is detained	**2021** (8 Feb): CTUM-led general strike; unions become central to the Civil Disobedience Movement
2021 (Mar): Protesters killed in the dozens; martial law imposed on Yangon townships. Many of the killings occur in Hlaing Tharyar, a garment hub	**2021** (26 Feb): Sixteen unregistered unions and civil society groups are outlawed, announced on public television
2021–: Armed resistance and nationwide civil war	**2023–25**: Basic minimum wage unchanged at MMK 4,800/day since 2018; MMK 3,000 in daily allowances lifts total pay to MMK 7,800/day
2024 (Feb): People's Military Service Law activated; the draft covers men 18–35 and women 18–27, rising to 45 and 35 for professionals	**2025** (Mar): The ILO Governing Body recommends Article 33 measures against Myanmar over Conventions 87 and 29
2025–26: A three-phase election (28 Dec, 11 Jan, 25 Jan) gives the military's USDP 739 of 1,025 seats; widely condemned as a sham staged to entrench military rule	**2026**: Union activity remains criminalized, but organizers work on from border safe houses: 438 labor rights violations documented in 2025

Sources: Politics: BBC News (2018); Wikipedia (2026c); Al Jazeera (2021); 2007 "Saffron Revolution", International Labour Organization (2023); February 2021 onward, Richard Weir (2021); United Nations (2024); Al Jazeera (2025, 2026); Myo Pyae (2026). Labor: pre-1962 unions, The Irrawaddy (2020); Wikipedia (2026a,b); 1962 suspension, International Labour Organization (2022); 1964 law, International Trade Union Confederation (2007); 2011 Labour Organization Law, Pyidaungsu Hluttaw (2011); 2012 disputes law, International Labour Organization (2023); 2013–15 minimum wage, Myanmar Law Library (2013); 2019 strikes, the March 2020 Myan Mode dismissals, the 8 February 2021 general strike and the 26 February 2021 announcement, Lin (2021); the sixteen organizations outlawed on 26 February 2021 and their status since, International Labour Organization (2022, 2023); minimum-wage levels for 2018 and 2023–25, International Labour Organization (2023); Progressive Voice (2025); Article 33, International Labour Organization (2023, 2025); 2026 union activity, IndustriALL Global Union (2026).

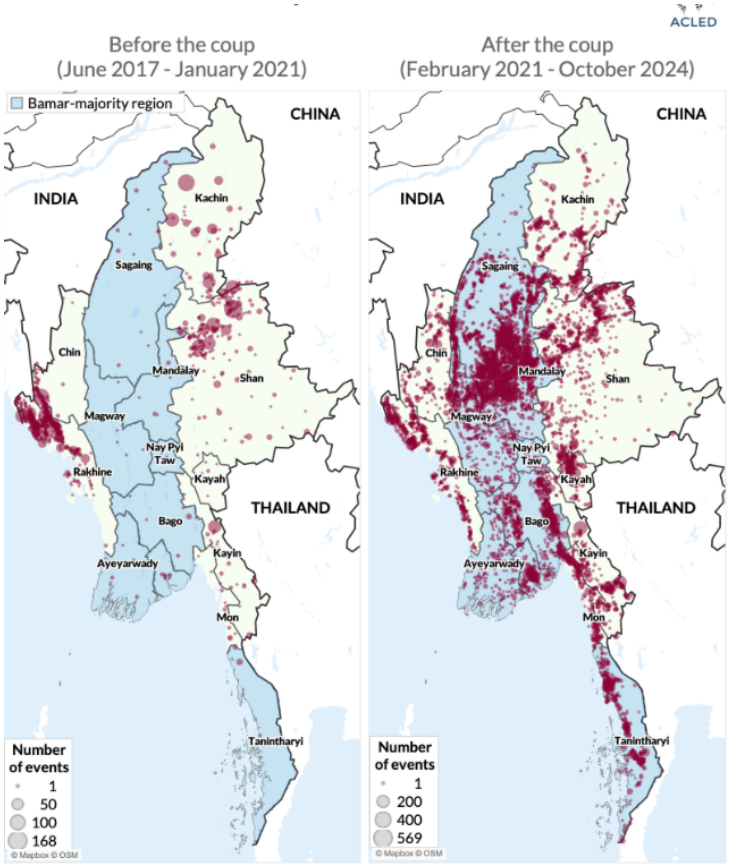


Figure 3: Political Violence in Myanmar, Before and After the Coup

Source: Reproduced from ACLED database (Mon, 2024). Each circle is a locality and its size the number of ACLED-recorded political violence events there; the left panel covers June 2017 to January 2021 and the right panel February 2021 to October 2024. The shaded area marks the Bamar-majority regions of central Myanmar, which had seen decades of comparative peace before the coup. Note that the two panels use different size scales, so circles are comparable within a panel but not across.

3 Data

3.1 Pre-coup worker survey (2019–2020)

Our worker data come from the survey and randomised controlled trial reported in Boudreau et al. (2025a), a stratified random sample of workers in 19 garment factories. The survey covers 1,941 workers, of whom 1,933 have a cleaned name and 1,104 completed the full trait and skill battery. Workers are classified as factory union president (P), line leader (LL), union worker (UW) or non-union worker (NUW). Cleaning the names required removing honorifics such as "U" and "Ma", splitting multiple names into separate columns, and inferring gender from the name. Online Appendix Table B.1 reports union-level summary statistics, and Online Appendix Figure A.1 dis-

plays the locations of the participating factories in the Yangon region.

Table 1: Factory Workforce Composition, Named Worker Sample

	Overall (19 factories)	Invited	Participated	Participated (w. Skills)
Presidents (P)	20[§]	19	18[†]+1	10
Line Leaders (LL) / EC	327	190	169	134
Union Workers (UW)	936	936	594	415
Non-Union Workers (NUW)	575	575	322	218
Total	**1,858**	**1,719**	**1,104**	**777**
Distinct factories	19	19	19[*]	19

[§] One factory has 2 Presidents.

[†] One factory had a secretary rather than a president.

[*] Workers surveyed in 17 of 19 factories due to COVID-19 restrictions.

Notes: Unit of observation is worker. The columns are successively narrower samples. *Overall* is the population of the four worker types across the 19 factories with a CTUM-affiliated union that entered the study. *Invited* is the subset asked to attend a survey session: every president, union worker and non-union worker was invited, while line leaders were sampled, so their count falls between the two columns. *Participated* is the subset who attended and completed the survey, and *Participated (w. Skills)* the further subset who also completed the sewing skill assessment, which was administered only to machine operators.

3.2 Political-prisoner records (AAPP)

Our repression data are individual-level panel records on political prisoners, the most comprehensive documentation of arrests following the 2021 coup, and cover January 2021 to March 2024. Each record reports demographics such as name in English and Burmese, gender, age and parents' names, along with location at the town, township and state or region level, political and organisational affiliations, and the dates of arrest, sentencing, release and, where applicable, death. The records also report direct outcomes: whether the person was killed, sentenced to death, given life imprisonment or hard labour, and the number of months imprisoned. The full dataset contains 30,908 records, of which 30,683 are uniquely identified. Restricting to Yangon and to records with a missing region leaves 6,401.

Matching survey to AAPP We match the two sources on names. Aliases are split and each AAPP record carries up to five English and five Burmese variants; a survey worker is matched if either the English or the Burmese name matches exactly, and multiple matches per person are allowed and counted. This links 459 of the 1,933 workers with a cleaned name, a match rate of 23.8 per cent. Online Appendix Table A.2 reports match rates by worker type and Online Appendix Figure A.3 shows them on both the extensive and the intensive margin.

Matching on names alone raises two concerns. Workers with common names are mechanically more likely to be matched, and a matched record may be attached to more than one worker. Online Appendix A describes the safeguards. For the first, we control for how often a name appears in the Myan Ku database in the regressions for the probability of a match to AAPP reported in Figures A.4 and 8. For the second, Figure A.5 reports how many duplicates an ambiguous record carries, by worker type. Table A.3 asks whether the records we match are selected: whether matched union and non-union workers differ on the attributes AAPP records, and whether the records we match differ from the rest of the database.

3.3 Township-level garment-factory and union database

We combine the Myanmar Garment Manufacturers Association, the Myan Ku database, and union-federation Facebook lists to construct the number of garment factories and the share of unionized garment factories by township.

3.4 Protest and conflict data (ACLED)

ACLED records protest and conflict events worldwide, classified as protests, riots, battles, violence against civilians, strategic developments, or explosions and remote violence. We aggregate the events to township-month counts and restrict attention to the Yangon region, which is where the garment sector and our sample factories are concentrated.

3.5 Unions' Facebook communications

Facebook was the dominant social media platform in Myanmar in the years surrounding the coup.[8] We collected Facebook posts from the country's two largest national-level federations: the CTUM (1,177 posts); and the Solidarity Trade Union of Myanmar (STUM, 345 posts). Both federations' pages are public and hence accessible. We collected all posts published on these pages between January 1, 2020 and June 30, 2021.

The majority of posts are in Burmese, with the remainder in English. Burmese-language posts were first machine-translated to English using ChatGPT. Each translation was then reviewed by a Burmese research assistant, and the edited version was used wherever the assistant corrected the translation. Appendix Figure C.3 shows the number of posts and the average (translated) post length by month.

Two features of the post-coup information environment are relevant for interpreting the corpus. First, while federations often denounce the coup and report protests that have *already* occurred, we do not observe posts that announce specific future protest actions at particular dates and locations. This gap is consistent with accounts that, as the crackdown intensified, organizers moved the tactical coordination of street actions to encrypted channels such as Twitter, Signal, and Telegram (Sahbaz, 2021; DFRLab, 2021). Second, on February 4, 2021, the military junta ordered domestic telecom operators and internet service providers to block access to Facebook on the major domestic networks (Reuters Staff, 2021). Users circumvented the block at scale through virtual private networks (VPNs), proxies, and alternative network paths; on the day of the ban, demand for commercial VPN services in Myanmar rose sharply (Japan Times Staff, 2021). Taken together, the federations' Facebook posts capture the public, declarative layer of the union response and serve as a reasonable proxy for the publicly stated stance of organized labor more broadly. They do not, however, cover either the tactical coordination of street actions. Additionally, the size of the post-coup audience depended on users' ability to circumvent the block.

[8] Internet penetration rose sharply after the early 2010s, and by early 2022, Meta's advertising audience-reach tools estimated Facebook's reach in Myanmar at 19.25 million users, approximately 44.4 percent of the 13-and-above population (Kemp, 2022).

4 Unions' reorientation toward pro-democracy resistance

4.1 Possible motivations

What could have induced organizations created to bargain over wages and working conditions to confront a military regime? The pivot exposed union leaders and members to arrest, torture, and death (Duncan, 2024; Progressive Voice, 2025), while redirecting organizational resources toward a political objective whose benefits extended far beyond the workplace. The decision was therefore both costly and consequential. Why did the federations make it? We consider four complementary explanations, while recognizing that the available evidence is better suited to evaluating some than others.

Institutional defense. The simplest explanation is that unions correctly anticipated that the coup was an existential threat to their existence. Independent unions were illegal for the entire 1962–2011 period of military rule, and legal unions were a result of the political opening that began in 2011 (Pyidaungsu Hluttaw, 2011). On this account, resisting the coup was not altruism but organizational self-preservation. As Section 2.2 details, this expectation proved accurate post-coup. One challenge with this explanation is that it predicts action more narrowly targeted at the unions' own survival rather than front-line leadership of a mass pro-democracy movement.

Economic shock. A second possibility is economic reasons. The coup triggered order cancellations and buyer withdrawals in a garment sector overwhelmingly oriented toward European and North American brands, and workers could reasonably have expected a junta to be both unwilling to raise wages and to enforce the labor protections that had been won since 2011, such as the introduction of a minimum wage, the expansion of social security coverage, and stricter prohibitions on forced labor (Harkins, 2021). In this view, the pivot reflects a rational updating about future bargaining returns: if the expected payoff to workplace bargaining collapses, the relative return to political action rises. This is consistent with what followed—the basic statutory minimum wage has not moved from its 2018 level of MMK 4,800 per eight-hour day, with subsequent increases in take-home pay delivered through allowances rather than

the wage floor (Progressive Voice, 2025)—but the same evidence is equally consistent with the political explanations below, since a junta that suppresses unions will also suppress wages.

Political preferences. A third possibility is that union members held stronger pro-democracy values than other Myanmar citizens, and that the coup activated a latent preference. We find the *least* support for this possibility. Because our own survey instruments contain no items on democracy or political values, we turn to the World Values Survey Wave 7, which was fielded in Myanmar in 2020 and identifies union membership.[9] On nine measures of democratic values, including the approval of a democratic political system and the stated importance of living in a democracy, union members are statistically indistinguishable from non-members or score lower (on one measure).

This null is not a null on *political engagement*. On the same survey, union members belong to 4.5 civil-society organizations on average, excluding the union itself, against 1.3 for non-members ($p < 0.001$); 18.9% have attended a demonstration against 4.7% ($p = 0.01$); and they discuss politics more often ($p = 0.01$). All of these survive adjustment for sex, age, education and urban residence. The pattern is therefore one of equivalent democratic *values* alongside markedly greater civic and protest *experience*—which points toward capacity, networks, and habit as key channels.

Social preferences. A fourth possibility is that unions' dense social networks generated the willingness to bear private costs for a public good. Union leaders' own accounts are often framed in these terms (Section 2.2). The WVS is consistent with this reading: 26.4% of Myanmar union members say most people can be trusted, compared to 14.6% of non-members (conditional on demographics, $p = 0.055$). Together with the organizational-membership gap above, this suggests unions either engendered trust and empathy among their members or attracted people who were especially altruistic and trusting, arguably valuable attributes for solving a collective-action problem.

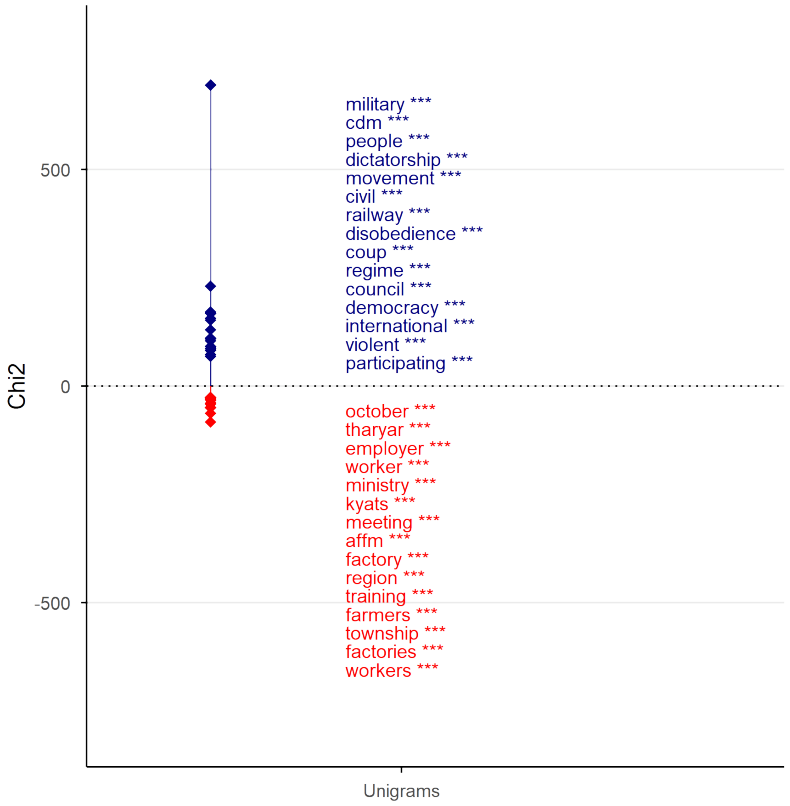
[9] There are 53 union members of 1,200 Myanmar respondents (4.4%).

4.2 Evidence from Facebook communication

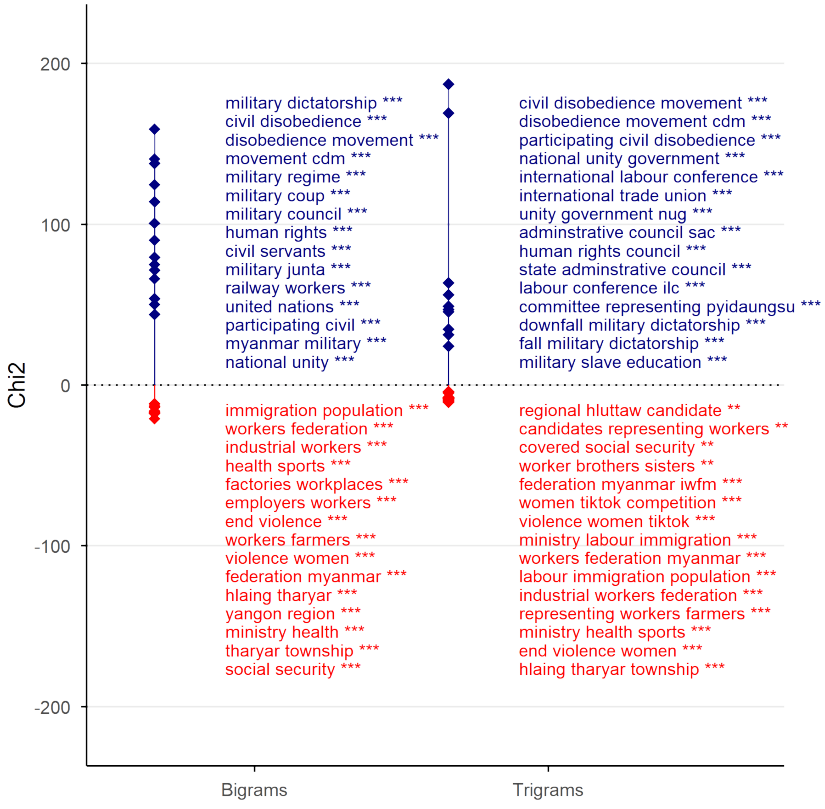
The CTUM immediately responded to the coup on Facebook by issuing a statement:

> *"The Confederation of Trade Unions stated that, at a time when our country is striving to emerge from decades of poverty and is simultaneously facing the global pandemic and its severe consequences, it cannot afford to deviate from the path of democracy or revert backward. [...] It also declares its opposition to and rejection of any coup or any attempt to reverse the democratic process, [...]."* (February 1, 2021)

This section documents that this post was not a one-off condemnation. Instead, the CTUM and STUM systematically reoriented their public communication from labor to political issues and shifted the tone of their communication to be more confrontational.



(a)



(b)

Figure 4: CTUM Facebook posts: keyness of uni-, bi-, and tri-grams, pre- vs. post-coup.

Notes: The figure reports keyness statistics—a signed χ^2 measure of disproportionate term use between pre-coup and post-coup posts–for the 15 terms most disproportionately associated with each period. Words shown in red (blue) are disproportionately associated with the pre- (post-)coup period; significance markers indicate unadjusted χ^2 p-values (* $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$).

N-gram analysis. We first examine how the vocabulary in the union federations' public Facebook communication shifted from before to after the coup. We compute keyness statistics—a signed χ^2 measure of disproportionate term use between pre-coup and post-coup posts (for details of the method, see Appendix C.1)—using the Facebook posts by the CTUM.[10] In Figure 4, words shown in red (blue) are disproportionately associated with the pre- (post-)coup period. The figure plots, separately for unigrams, bigrams, and trigrams, the 15 terms most disproportionately associated with each period.

The pre-coup cluster is dominated by labor- and union-related vocabulary, such as *workers*, *factories*, *social security*, *ministry health*, and *end violence women*, that reflect the unions' pre-coup concerns: workplace pay and conditions, occupational health and safety, and opposition to violence against women in the workplace. In stark contrast, the post-coup cluster is dominated by pro-democracy, resistance-related vocabulary, such as *democracy*, *Civil Disobedience Movement*, *military dictatorship*, *human rights*, and *National Unity Government*. This shift evidences that the union federation's public communication turned from workplace-level labor concerns to a pro-democracy resistance against the military regime.

Semantic alignment. We next examine how the unions' substantive concerns and their goals shifted between from before to after the coup. We represent each post as a point in a two-dimensional semantic space, following the geometric representation of text discussed by Gentzkow, Kelly and Taddy (2019) (formal specification in Appendix C.1). To this end, we first define two axes by setting anchor-words for each of four poles. The first axis explore the contents of the post, contrasting language about *labor issues* with language of *political resistance* to the military regime.[11]

The second axis explores the Federation's strategy, contrasting an *accommodating*

[10] Appendix Figure C.1 is the same figure for the STUM.

[11] Labor anchor words: workers, wages, workplace, and employment. Political resistance anchor words: coup, military, junta, resistance, and democracy.

posture with a *confrontational* one.[12] Given our prior research on industrial relations and the CTUM in Myanmar (Tanaka, Minni, Nguyen and Macchiavello, 2019; Boudreau et al., 2025b), we expected the unions to use more accommodating language pre-coup, as they employed both negotiation and agitation tactics with employers.

We then score each post against an axis using an AI embedding model, which represents texts as vectors in a high-dimensional space in which similar meanings lie close together. This lets us measure proximity of meaning rather than mere co-occurrence of the anchor words.

Figure 5 plots pre- and post-coup posts by the CTUM in this space and marks the period centroids, calculated as the post-mean coordinates on each axis. Pre-coup posts appear in red and post-coup posts in blue. Before the coup, the centroid sits in the lower half of the content axis (the labor end) and roughly midway along the strategic axis, with substantial spread on both sides of zero. After the coup, the centroid shifts substantially upward into the political half and rightward toward the confrontational pole. Notably, the labor pole is no longer the modal content focus, and the goal orientation is decidedly adversarial. The STUM's posts display the same shift (Appendix Figure C.2), consistent with the federations' shared institutional role.

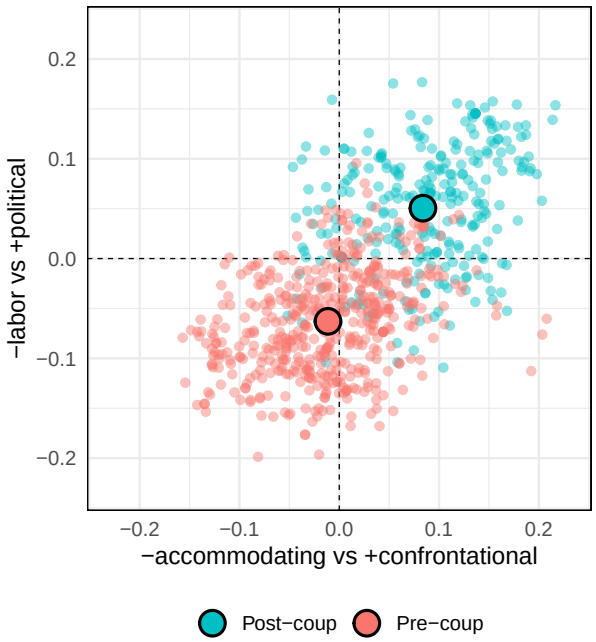
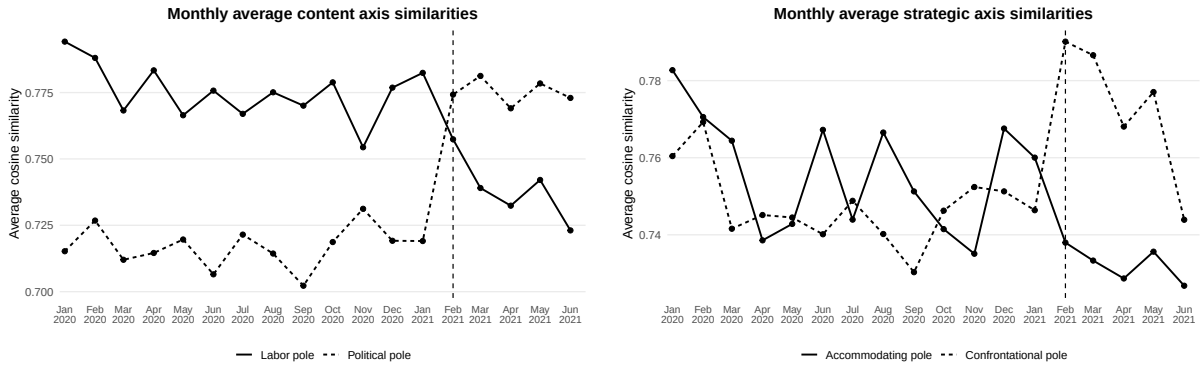


Figure 5: Semantic analysis, CTUM Facebook posts

[12]Accommodating anchor words: negotiation, meeting, mediating, and discussion. Confrontational anchor words: strike, protest, and demonstration.

The month-by-month trajectory in Figure 6 corroborates and dates the shift: through 2020 the labor pole consistently traces above the political/anti-coup pole. The two series cross at the February 2021 coup and the political pole dominates through the end of the observation window. On the strategic axis, the confrontational pole rises while the accommodating pole recedes across the same months.



Labor and Political poles Accommodating and Confronting poles

Figure 6: Semantic analysis, monthly, CTUM Facebook posts

Taken together, the figures show a shift in the federations' concerns and strategies: from labor-related topics, accompanied by a mix of accommodating and confrontational strategies, toward anti-coup topics with a more confrontational posture. Both shifts are descriptive—the comparison does not by itself identify a causal effect of the coup.

5 Did unions mobilize the resistance?

We first ask whether townships with a stronger pre-coup union presence in the garment sector saw more intense civilian mobilization and military repression after the coup. We measure pre-coup union activity, $UnionActive_i$, using two proxies built from the township-level garment-factory and union database described in Section 3: (i) the number of garment factories in township i that experienced a labor dispute in 2016, and (ii) the share of garment factories in township i that were unionized. Our baseline specification uses a binary treatment variable for being above the median value of the variable. For both variables, the median is zero, so they effectively separate townships with *any* recorded dispute history or unionized factories from those without; for la-

bor disputes, this is 11 of 43 townships, and for unionized factories, this is 16 of 33 townships.

We estimate a township-by-month event-study specification,

$$Y_{it} = \sum_{k \neq -1} \beta_k \left(UnionActive_i \times \mathbb{1}[t - coup = k] \right) + \delta_i + \delta_t + \varepsilon_{it},$$

where i indexes townships, t indexes year-months, δ_i and δ_t are township and year-month fixed effects, and standard errors are clustered by township. The coefficients β_k identify the differential evolution of mobilization in high- versus low-union-presence townships in each month k relative to the coup, relative to the omitted month $k = -1$. We consider two outcomes built from the ACLED data: civilian collective action (protests and riots) and armed violence and state action (battles, explosions/remote violence, violence against civilians, and strategic developments). Online Appendix Table B.3 reports summary statistics for the townships and controls, while Online Appendix Figure A.7 and A.6 show the spatial distribution of the treatment and outcome variables.

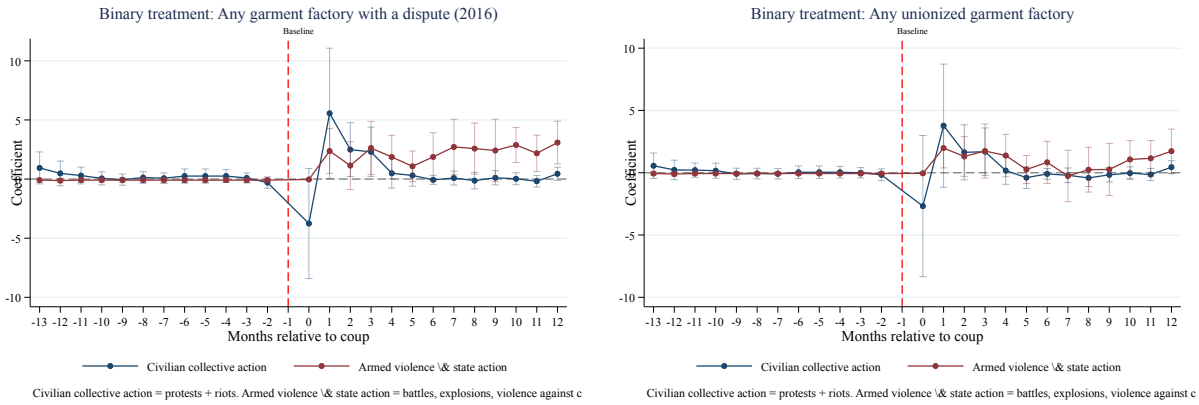
Figure 7 plots the estimated β_k separately for the two binary $UnionActive_i$ measures (dispute history, left panel; unionization share, right panel), and separately for civilian collective action and armed violence and state action. In the 13 months preceding the coup, coefficients for both categories are small and close to zero in both panels, consistent with parallel pre-trends across high- and low-union-presence townships. In the month of the coup itself, civilian collective action in higher-union-presence townships dips briefly relative to lower-union-presence townships, before rising sharply in the following month to its post-coup peak, and remaining elevated through around months 4-5. Armed violence and state action also rises in higher-union-presence townships after the coup, following a more gradual path that continues to trend upward through the end of the sample window. The pattern is qualitatively similar whether union presence is measured by pre-coup dispute activity or by unionization share, though the magnitudes are somewhat larger for the dispute-based measure.

To quantify the economic significance of these results, there were 6.4 civilian collective actions in townships with no garment factory reporting a labour dispute in 2016, in the month after the coup, so 5 additional events represents a 86% increase. For

armed violence and conflict, the coefficient estimates plateau around 2-3 additional events per month in months 6-12, a 127% increase relative to the average monthly rate of 1.8 events those townships during this window.

Figure 12 shows in Panel (a) that union leader arrests are concentrated in the same locations and time windows as protest activity, consistent with these arrests occurring as a consequence of participation in the resistance rather than reflecting a pre-existing, unrelated geography of repression.

Robustness checks. Results are unchanged when using continuous measures of the treatment variables (Online Appendix Figure A.12). They are robust to augmenting the baseline specification with pre-coup, time-invariant township characteristics interacted with a post-coup indicator: log distance to the protest epicenter of Kyauktada township, and, in a second specification, log population and the 2019 informal-manufacturing employment share (Online Appendix Figure A.8 and A.9). Finally, Online Appendix Figure A.14 drops Taikkyi, an outlier township in ACLED events in the month after the coup (see OA Figure A.6), and shows that the month 1 dip in civilian collective action in higher- versus lower-union-presence townships in this month disappears, while the estimates for the subsequent months remain stable, indicating robustness to dropping this township.



Any garment factory with a 2016 dispute Any unionized garment factory

Figure 7: Post-Coup Mobilization by Pre-Coup Union Presence

Notes: Unit of observation is township-month. Each point is $\hat{\beta}_k$ from the event-study specification in Section 5, the differential change in the outcome in townships with a stronger pre-coup union presence in month k relative to the coup of February 2021. The month before the coup is the omitted category. In the left panel the treatment indicates that at least one garment factory in the township recorded a labor dispute in 2016; in the right panel, that at least one garment factory in the township was unionized. Both variables have a median of zero, so the indicators separate townships with any such factory from those with none. Each panel plots two outcomes constructed from ACLED: *civilian collective action*, which pools protests and riots, and *armed violence and state action*, which pools battles, explosions and remote violence, violence against civilians, and strategic developments. All specifications include township and year-month fixed effects. Standard errors are clustered on township and bars are 95 percent confidence intervals. The sample runs from January 2020 to February 2022.

6 Mechanisms

Three channels could produce the patterns we document. Under a *selection* channel, individuals differ in a latent trait —a predisposition toward collective action, prosociality, or openness— and workers with a high value of this trait are more likely both to join or lead a union and, independently of any union activity, to participate in protest and expose themselves to arrest. On this account, unions matter only because of *who they attract*, whether among the rank and file or in the leadership itself.

A closely related but distinct possibility is *charismatic* or high-quality leadership: unions may matter not because their ordinary members differ from non-members, but because whoever happens to become a union's leader is an unusually able or charismatic individual, and that person's own quality directly draws followers into protest.

Unlike selection into the rank and file, this channel is specific to leaders; and unlike organizational capacity below, it requires no organizational infrastructure at all — a sufficiently able or charismatic leader could mobilize followers on the strength of her own person, regardless of what the union around her does.

Under an *organizational capacity* channel, unions instead build infrastructure — coordination among members, channels for transmitting information, legitimacy conferred by the organization, and social reinforcement — that converts a given level of latent predisposition, in members and leaders alike, into actual participation. On this account, unions matter because of *what they do*, over and above who joins them or who leads them.

The three channels make different predictions about the data. If ordinary member selection is the main channel, controlling for individual traits should eliminate any residual association between union status and repression. If charismatic leadership is the main channel, leader quality should predict repression of the leader herself and repression spillovers of her followers on its own, independent of the organization's capacity. If organizational capacity is the main channel, organizational capacity should predict both the level of repression and the strength of any spillovers *conditional on* individual traits and leader quality. The rest of this section presents empirical evidence speaking to these predictions.

6.1 Selection channel

If unions mobilized the resistance simply because they are composed of people who were already inclined to protest, the large majority of union membership — rank-and-file union workers and line leaders — should show elevated arrest rates relative to non-members.

For worker i in factory f, we estimate

$$Y_{if} = \beta_1 P_i + \beta_2 LL_i + \beta_3 UnionW_i + \mathbf{X}_i'\gamma + \delta_f + \varepsilon_{if}, \tag{6.1}$$

where Y_{if} is the number of AAPP records matched to worker i; P_i, LL_i and $UnionW_i$ indicate a factory union president, a line leader and a rank-and-file union member; $\mathbf{X}_i$ collects individual controls; and δ_f is a factory fixed effect. Non-union workers are the

omitted category, so each coefficient is the difference in the expected number of arrests relative to a non-union worker in the same factory.

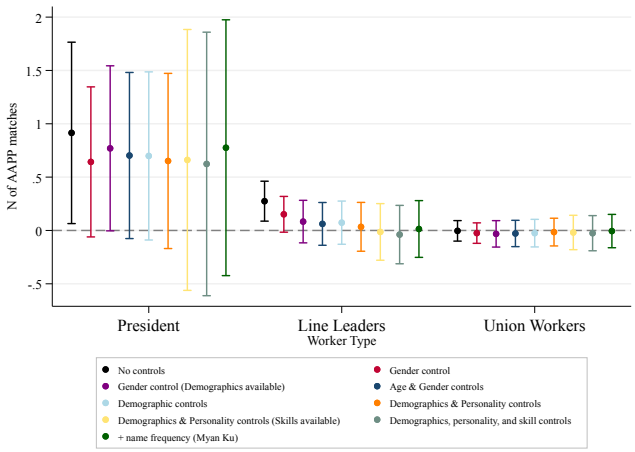


Figure 8: Arrest Intensity by Union Role

Notes: Unit of observation is worker. The outcome is the number of AAPP records matched to the worker's name. Each marker is a coefficient on the worker-type indicator from a separate estimate of equation (6.1); nonunion workers are the omitted category and every specification absorbs factory fixed effects. The specifications differ only in the control set, as given in the legend: gender; age and gender; demographics, meaning gender, age, years of education, Raven score, migrant status and tenure in the factory and in the sector; demographics and personality, adding the five Big Five dimensions, grit and the incentivized altruism choice; those plus skills, adding previous sewing efficiency and skill grade; and finally the log of one plus the number of times the worker's name occurs in the Myan Ku list. Two of the specifications, marked *available* in the legend, re-estimate a simpler model on the smaller sample for which the richer controls exist: the gender-only model on workers with complete demographics, and the demographics and personality model on workers with complete skills. Comparing each against its neighbours separates movement due to the added controls from movement due to the change in sample. Bars are 95 percent confidence intervals from heteroskedasticity-robust standard errors.

Figure 8 finds no such pattern of elevated arrest rates for union members and line leaders. Rank-and-file union workers are statistically indistinguishable from non-union workers in the same factory, across every set of controls, including the specification with the full battery of personality, cognitive, and demographic traits, and in a subsample of sewing machine operators for whom we can include granular controls for their skills. For line leaders, once a control for gender is added, they are statistically indistinguishable from non-union members. Figure A.4 uses a binary outcome and shows the same pattern on the extensive margin. This is a direct test of the selec-

tion channel described above: if unions mobilized resistance only because of the kind of people who join them, the large majority of their membership should show it. They do not — our first result pointing away from a selection mechanism.

6.2 Charismatic leadership channel

Repression did, however, fall disproportionately on union presidents. Relative to a non-union worker in the same factory, presidents are matched to 0.65 additional arrest records – relative to a non-union worker mean of 0.37 – under the specification in equation (6.1) above, and the effect is stable across the same range of control sets and the subsample of sewing operators, ranging from 0.62 to 0.92 (Figure 8). This indicates arrest frequencies are 1.75 to 2.5 times higher for presidents.

This raises a possibility distinct from ordinary selection: perhaps presidents are simply the kind of people — able or charismatic, and so predisposed to protest — who would have been at the front of any protest regardless of their formal position. We test this directly, estimating a seemingly unrelated regression in which two outcomes—holding a leadership position, as either president or line leader, and being matched to an arrest record in 2021—are explained by the same battery of standardized traits: the five Big Five dimensions, the Raven score, grit, prosociality and locus of control, together with demographic controls for gender, age, education, migrant status, and tenure in the factory and in the sector. Estimating the two equations jointly lets us test, trait by trait, whether a characteristic enters the two outcomes with the same coefficient.

Table 2 shows that the personality and cognitive traits that strongly predict *who becomes a leader* are nearly uninformative about *who is arrested*. The same battery explains 35% of the variation in leadership but 2% of the variation in arrest, and a joint test rejects equality of the trait coefficients across the two outcomes ($p < 0.001$). Arrest is the noisier of the two outcomes, so part of the gap in explanatory power is due to greater measurement error; the coefficient tests, however, do not rely on the comparison of R-squared.

Table 2: Traits Predict Leadership but Not Arrest

	(1) Leader (P/LL)	(2) Arrested	(3) p (L=A)
Personality			
Extraversion	0.023**	-0.009	0.016
	(0.010)	(0.010)	
Agreeableness	0.028***	0.004	0.096
	(0.008)	(0.012)	
Conscientiousness	0.039***	0.021**	0.204
	(0.009)	(0.009)	
Neuroticism	-0.024**	-0.021**	0.795
	(0.009)	(0.008)	
Openness	-0.013*	0.021*	0.012
	(0.007)	(0.010)	
Cognition & preferences			
Raven score	0.003	0.014	0.413
	(0.010)	(0.009)	
Grit	0.193***	0.017*	0.000
	(0.011)	(0.009)	
Prosociality	0.032***	0.012	0.134
	(0.010)	(0.009)	
Locus of control	0.007	-0.017	0.069
	(0.009)	(0.010)	
Demographics			
Male	0.282***	0.067*	0.000
	(0.065)	(0.033)	
Age	0.006	0.008	0.940
	(0.011)	(0.015)	
Education (yrs)	-0.004	-0.016	0.389
	(0.009)	(0.013)	
Migrant	-0.009	-0.016	0.784
	(0.017)	(0.025)	
Months in factory	-0.006	0.009	0.426
	(0.018)	(0.011)	
Months in sector	0.035**	0.003	0.112
	(0.013)	(0.015)	
Observations	1104	1104	
R^2	0.385	0.028	
Joint test: personality			0.001
Joint test: cognition & pref.			0.000
Joint test: demographics			0.008
Joint test: all			0.000

Notes: Unit of observation is worker; the sample is the workers with complete data on every regressor. Columns 1 and 2 report ordinary least squares estimates of the same specification for two different outcomes: holding a leadership position, as either president or line leader, and being matched to an AAPP record with an arrest date in 2021. Column 3 reports, for each regressor, the p-value of a test that its coefficient is the same in the two equations, obtained from a seemingly unrelated regression of the two equations estimated jointly. Personality, cognition and the continuous demographic variables are standardised to mean zero and unit standard deviation, so their coefficients are per standard deviation; male and migrant are indicators. Prosociality is the amount donated to an orphanage in an incentivized question. The specification includes no factory fixed effects. Standard errors in columns 1 and 2 are clustered on factory and reported in parentheses. The rows below the coefficients report joint tests that the coefficients in each block, and then in all three blocks together, are equal across the two equations. * $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$.

Taken together, these two pieces of evidence indicate that what predicts repression is a worker's position as union president, not the individual characteristics that sorted them into that position: our second result pointing away from a selection mechanism, and specifically against charismatic leadership as an explanation for why leaders themselves are targeted.

6.3 Organizational capacity channel

To assess the role of unions' organizational capacity, we construct a factory-level index following Anderson (2008): an inverse-covariance-weighted combination of five components, namely the ratio of union to non-union workers, the rate of mobilization around the minimum wage, attendance at meetings, consultation of members, and the extent to which leaders communicate goals. Online Appendix Figure B.1 displays the weight on each component, and Figure B.2 the correlation between organizational capacity and other factory-level characteristics.

We measure leadership quality as in Boudreau et al. (2025b): by revealed preference, union members find traits differentially associated with presidents to be important for leadership ability, so we predict the probability of being a union president from a probit model with the traits in Table 2.

We first document that unions scoring higher on organizational practice also have presidents who score higher on our measure of leadership quality (Figure 9): leader quality and the strength of the organization are not independent attributes of a union. This pattern is cross-sectional and does not establish whether there is a causal relationship between the two, and if so, in which direction. It is possible, though, that abler leaders build stronger organizations, or strong organizations develop or attract abler leaders. Section 7 discusses one way of formalizing the first reading, treating leader quality as lowering the cost of building organizational capacity.

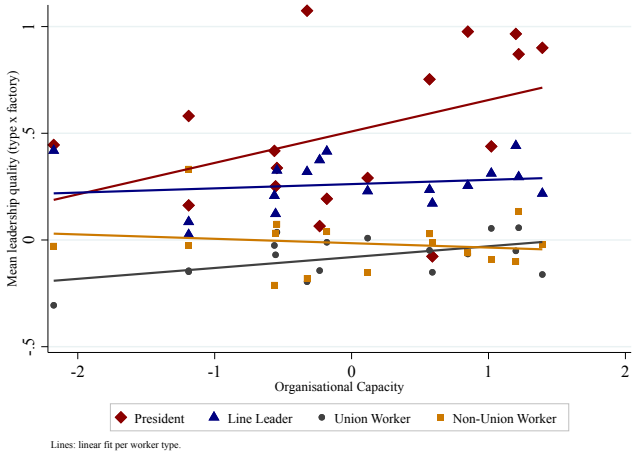


Figure 9: Leadership Quality and Organizational Capacity, by Worker Type

Notes: Unit of observation is a factory-by-worker-type cell, so each factory contributes up to four markers. The vertical axis is the mean of the leadership-quality index among the workers of that type in that factory; it is therefore not president quality, which is the maximum of the same index over the factory's presidents. The horizontal axis is the organizational-capacity index and is constant across the four markers of a factory. Lines are unweighted linear fits estimated separately within worker type.

Of the two attributes just shown to covary, only one predicts who is repressed. Workers in factories above the median of organizational capacity had 21–32% higher arrest frequencies after the coup, and the estimate survives a rich battery of individual traits and a control for president quality (Table 3). President quality on its own does not predict worker mobilization (Online Appendix Table B.5). The repression that follows a union is therefore associated with the organization it has built, not with the measured quality of the person leading it: our second result pointing to an organizational rather than a selection mechanism.

This is consistent with leader quality mattering for mobilization *through* the organization it produces rather than alongside it, an interpretation we return to in Section 7.

Table 3: Heterogeneity by organizational capacity, pooled panel (wild-cluster bootstrap SEs)

	N of times name matched to AAPP					
	(1)	(2)	(3)	(4)	(5)	(6)
Panel A: Organisational capacity (all workers pooled)						
High Organisational Capacity	0.122	0.066	0.066	0.066	0.109	0.097
	[0.030]	[0.144]	[0.114]	[0.128]	[0.010]	[0.014]
Number of obs.	1800	1800	1070	1070	759	759
Mean Dep. Var. (low-capacity workers)	0.343	0.343	0.313	0.313	0.305	0.305
Nr. distinct factories	17	17	17	17	17	17
Panel B: Adding president quality						
High Organisational Capacity	0.114	0.062	0.071	0.073	0.109	0.100
	[0.112]	[0.278]	[0.122]	[0.132]	[0.028]	[0.010]
High-Quality President	0.027	0.014	-0.022	-0.031	0.000	-0.011
	[0.622]	[0.744]	[0.692]	[0.596]	[1.000]	[0.858]
Number of obs.	1800	1800	1070	1070	759	759
Mean Dep. Var. (low-capacity workers)	0.343	0.343	0.313	0.313	0.305	0.305
Nr. distinct factories	17	17	17	17	17	17
Gender control	No	Yes	Yes	Yes	Yes	Yes
Demographic controls	No	No	Yes	Yes	Yes	Yes
Personality controls	No	No	No	Yes	Yes	Yes
Skills controls	No	No	No	No	Yes	No

Notes: Unit of observation is worker. The specifications include no factory fixed effects, since the treatment varies only across factories; the comparison is therefore between factories rather than within them. Wild cluster bootstrap-t p-values, clustered on factory, are reported in square brackets and are based on 500 replications with Rademacher weights and seed 329048. The outcome is the number of AAPP records matched to the worker's name, which may partly reflect how common the name is; see the text. *High organisational capacity* indicates a factory above the median of the inverse-covariance-weighted index of Anderson (2008), built from five components: the ratio of union to non-union workers, the rate of mobilisation around the minimum wage, meeting attendance, consultation of members, and leadership goal communication. *President quality* is the maximum, over a factory's presidents, of a nine-trait composite of the five Big Five dimensions with neuroticism reversed, the Raven score, grit, prosociality and locus of control, each standardised across workers; factories are split at its median. Presidents are excluded and all remaining workers are pooled; the omitted category is workers in low-capacity factories, and the mean of the dependent variable is reported for that group. Panel B adds president quality and reports its coefficient, so the capacity estimate in that panel is net of president quality and the president-quality estimate is net of capacity. Columns 1 through 5 add controls progressively, as recorded in the lower panel; column 6 repeats the column 4 controls on the column 5 sample, so that a change between columns 5 and 6 reflects the controls rather than the sample.

Evidence from leader-arrest spillovers to non-members. We test whether a leader's arrest spills over to the coworkers around her along the union's chain of command. If so, it would be consistent with either organizational capacity or charismatic leadership, but not with selection of rank and file members or line leaders. To discern between the former two, we test whether the spillover's strength tracks the organization's capacity or the specific leader's own quality.

For each worker i in factory f, let G_f denote the calendar week of the president's first repression event, with $G_f = \infty$ for factories whose president is never repressed in sample. Let $Y_{i,t} \in \{0, 1\}$ indicate that worker i has herself been repressed by week t (an absorbing state). We estimate group-time average treatment effects,

$$ATT(g, t) \;=\; E\big[Y_{i,t}(g) - Y_{i,t}(\infty) \,\big|\, G_f = g\big], \tag{6.2}$$

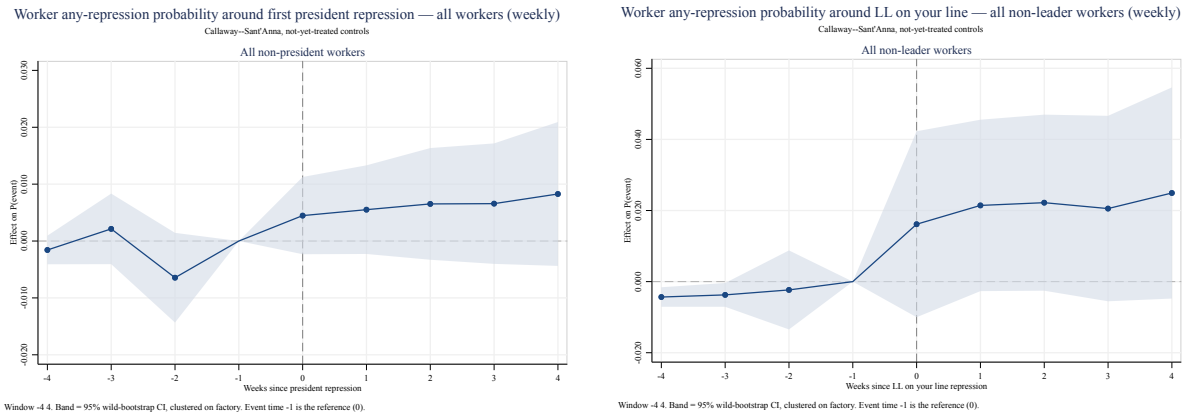
using the not-yet-treated estimator of Callaway and Sant'Anna (2021), with workers in factories where $G_f > t$ serving as the comparison group in period t. We aggregate $\widehat{ATT}(g, t)$ to event time $e = t - g$,

$$\widehat{ATT}(e) \;=\; \sum_{g} w_g \, \widehat{ATT}(g, g + e), \qquad e \in \{-4, \ldots, 4\},$$

normalizing $\widehat{ATT}(-1) = 0$, and report wild-cluster-bootstrap standard errors (500 replications) clustered on factory. The line-leader event study uses the identical specification, with G_f replaced by the week of the first repression of a line leader on the worker's own production line, and line leaders excluded from the estimation sample.

The sequencing of repression is visible in the raw data. Among factories in which at least one president was arrested, 60% of worker and line-leader arrests occur after the president has been arrested (Figure B.3); Online Appendix Figure B.4 reports the probability and timing of repression separately by worker type.

Figure 10 reports the pooled estimates for both treatments and Figure 11 disaggregates them by worker type. Table 4 summarizes the post-arrest effect as the average treatment effect over event weeks $+1$ to $+4$.



President arrest Line-leader arrest, same line

Figure 10: Spillovers from Leader Arrests to Workers

Notes: Unit of observation is worker-week. Each point is a Callaway–Sant'Anna group-time average treatment effect aggregated to event time, estimated on the full survey data with not-yet-treated workers as controls; the base period is event week -1. The outcome indicates that the worker is repressed in that week. In the left panel treatment is the first repression of the factory's president; in the right panel, the first repression of a line leader on the worker's own production line, so line leaders are the source of treatment and are excluded from the estimation sample. The event window runs from four weeks before to four weeks after treatment. Bands are 95 percent confidence intervals from a wild bootstrap clustered on factory with 500 replications.



President arrest Line-leader arrest, same line

Figure 11: Spillovers from Leader Arrests to Workers, by Worker Type

Notes: As Figure 10, with the effect estimated separately for union and non-union workers.

Table 4: Post-arrest effect (avg. weeks +1 to +4)

	Overall		By organizational capacity			
	Effect	p	High	Low	Difference	p
Panel A. President arrest						
All workers (pooled)	0.0067	0.18	0.0140	0.0006	0.0134	0.21
Line Leaders	**0.0253**	**0.09**	0.0146	0.0541	−0.0395	0.31
Union Workers	0.0085	0.31	0.0205	−0.0029	**0.0234**	**0.10**
Non-Union Workers	−0.0054	0.48	−0.0014	−0.0108	0.0094	0.64
Panel B. Line-leader arrest, same line						
All workers (pooled)	**0.0223**	**0.08**	0.0374	0.0096	0.0278	0.23
Union Workers	0.0207	0.13	0.0356	0.0051	0.0305	0.22
Non-Union Workers	0.0264	0.17	0.0520	0.0086	0.0435	0.19

Notes: Unit of observation is worker-week. Each entry is the average Callaway–Sant'Anna ATT over event weeks +1 to +4, aggregated with the covariance across horizons carried through, so it is the mean increase in the weekly probability that a worker is repressed in the month after the leader's arrest. In Panel A treatment is the first repression of the factory's president; in Panel B, the first repression of a line leader on the worker's own line, so line leaders are the treatment source there and do not appear as a row. Estimation uses not-yet-treated workers as controls on the full survey roster, with an event window of four weeks either side and the week before treatment as the reference. The right-hand block splits the sample at the median of the Anderson organisational-capacity index, computed across factories; High and Low are estimated on disjoint subsamples, so their difference is tested as two independent samples rather than by bootstrapping the difference itself. Standard errors are analytic rather than wild bootstrap, since `estat event` aggregates asymptotically even when the underlying estimation bootstraps; with 17 clusters they are likely too small, so the p-values should be read as a lower bound on the uncertainty. Bold: $p < 0.10$.

Following a president's first arrest, the probability that another worker in the same factory is also repressed rises steadily over the following month: from a pre-period close to zero, the effect reaches roughly 0.5 ppts in the week of the arrest and continues to grow to roughly 0.9 ppts by week four (Figure 10, left panel). Disaggregating by worker type (Figure 11) shows this pattern is driven by line leaders – for whom the increase is most pronounced and the ATE is statistically significant (p=0.09, Table 4) – and union workers; non-union workers show no detectable change in risk following a president's arrest.

Following a line leader's first arrest, the effect on workers on her own production line appears immediately and remains elevated at 2 ppts higher through week four

(Figure 10, right panel). Here, the by-type breakdown shows both union and non-union workers on the same line respond by comparable, economically large amounts (Figure 11), consistent with the spillover extending beyond the boundary of union membership. It is difficult to reconcile this with a channel in which the junta learns the identity of union members from an arrested leader and then pursues them: were that the mechanism, workers outside the union should be unaffected.[13] That both groups respond instead suggests that unions mobilize the workplace as a whole, drawing in members and non-members together — our third result pointing to an organizational rather than a selection mechanism.

To distinguish charismatic leadership from organizational capacity, we conduct heterogeneous treatment effects by organizational capacity and president charisma. Table 4 also reports the average treatment effect by subgroup over event weeks $+1$ to $+4$ for high and low organizational capacity. While being suggestive due to statical power limitations, Panel A show that the spillover effect of a president's arrest is 1.34 percentage points (ppts) larger in high versus low organizational capacity unions. This is driven by union workers, for whom the effect is marginally statistically significant (p=0.10). For line leader arrests, the spillover effect is 2.78 ppts larger in high organizational capacity factories (p=0.23) and is the same for union and non-union members.

Appendix Table B.11 shows that there is a much more muted pattern of heterogeneity by president quality for a president's arrest, which is not statistically significant for any subgroup. There is no pattern of heterogeneity by president quality for line leaders' arrests. Evidently, it is the capacity of the organization the arrested leader belonged to, not only her own removal, that predicts how far repression's effects travel through the workplace — our fourth result pointing away from a selection or charismatic-leadership mechanism and toward one operating at the level of the organization.

[13]We also note that the dynamics of the treatment effects are inconsistent with an arrested leader handing the junta a list of members, and the junta conducting round-ups. In this channel, we would expect an initial spike in arrests followed by attenuation back to zero. Instead, we find persistent elevation in repression risk, more consistent with repression being downstream of mobilization. Subsection 6.4 provides additional supporting evidence of this.

6.4 Validating the arrest-based measures

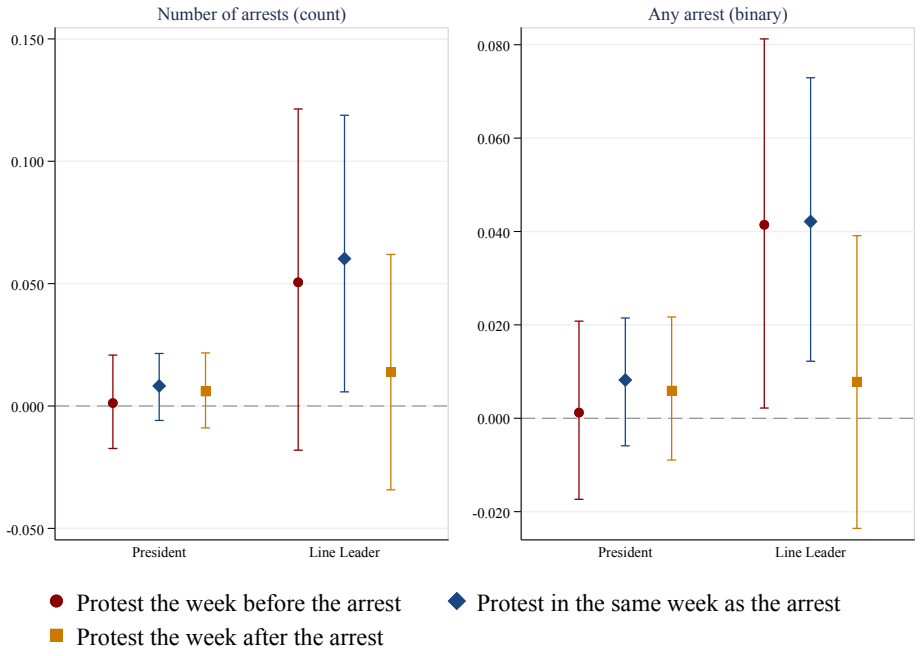
We interpret the results above as an increase in repression that is downstream of increased participation in the resistance. This is not obvious: an arrest could instead reflect the regime targeting known union leaders or members regardless of whether they personally participated in the resistance, in which case the patterns above would describe the targeting of repression rather than mobilization. We report an additional exercise addressing this directly.

Timing of arrests and protests. We build a balanced township-week panel for 2021, covering 44 townships, and ask whether arrests precede protests or follow them. For for each worker group g and horizon k, we estimate

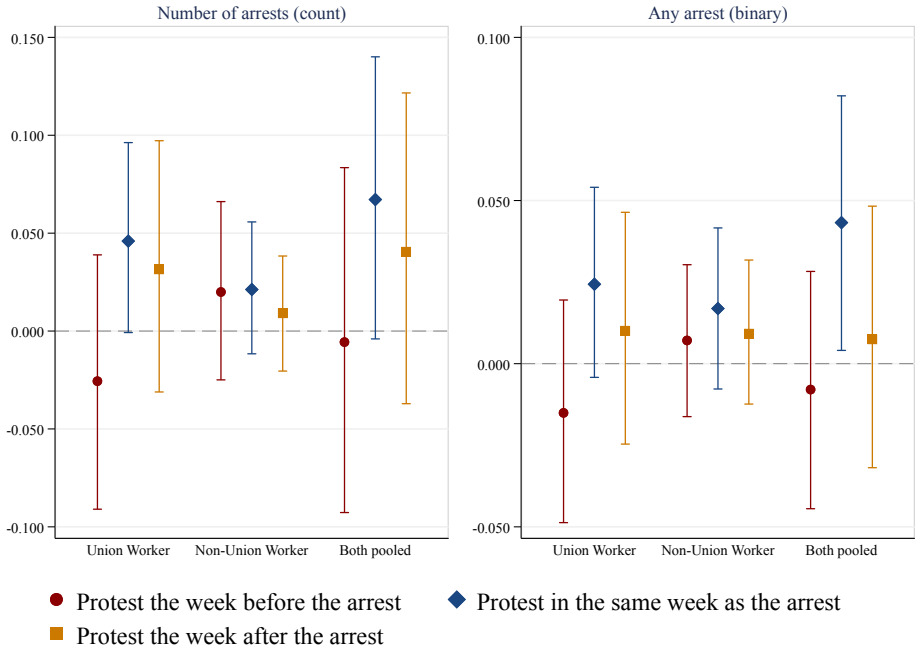
$$A_{it}^{g} \;=\; \beta_k \, P_{i,t+k} \;+\; \alpha_i \;+\; \tau_t \;+\; \varepsilon_{it}, \tag{6.3}$$

where A_{it}^{g} is either the number of arrests of workers of type g or an indicator for any such arrest in township i and week t; $P_{i,t+k}$ indicates a protest in the same township k weeks later or before; and α_i and τ_t are township and week fixed effects. A negative k means the protest comes before the arrest, a positive k that it comes after. Each horizon is estimated separately, on a common set of weeks. Standard errors are clustered on township and inference is by wild cluster bootstrap.

Figure 12 reports the estimates at the three horizons around the arrest week, so that the week before, the same week and the week after can be compared within a worker type and across types. Panel A covers presidents and line leaders, Panel B union and non-union workers. For line leaders the coefficients are positive in the week before the arrest and in the same week, and fall to approximately zero in the week after: protest precedes the arrest of a line leader rather than following it. Presidents show no such pattern. For workers the pattern is different. Union and non-union workers behave similarly, although the pattern is more pronounced for union workers: the coefficients are largest in the arrest week itself, with the week before and the week after close to zero. This suggests that arrests are responding to protest participation – and for line leaders, who are more likely to be targeted after the protest event, potentially to organization.



Panel A. Presidents and line leaders



Panel B. Union and non-union workers

Figure 12: Protests and Arrests in the Same Township

Notes: Unit of observation is township-week. Each marker is $\hat{\beta}_k$ from a separate estimate of equation (6.3) on a balanced panel of 44 townships, with township and week fixed effects and a common set of weeks across horizons. The regressor is an indicator for any protest in the township, taken one week before the arrest week, in the same week, and one week after. Within each panel the left-hand plot has the number of arrests of that worker type as the outcome and the right-hand plot an indicator for at least one such arrest. Panel B pools union and non-union workers in its third position. Bars are 95 percent confidence intervals from a wild cluster bootstrap on township with 999 replications. Presidents are arrested in only 10 of the 44 townships, and almost all of them once, so the estimates for presidents are imprecise. Sample: 2021.

6.5 Robustness and alternative explanations

One concern with Result 1 on union presidents is that presidents, and their arrests, differ from non-president arrests in such a way that makes them more likely to be recorded in the AAPP. If so, we would expect the records associated with the arrests – for example, the completeness of the record and the characteristics of the individual arrested – to systematically vary between president and non-president arrests. Online Appendix Table A.3 presents evidence that the president arrests are similar to non-president arrests in our sample in terms of their recorded attributes in AAPP. A related concern is that unionized factories, or the workers within them, differ on some unobserved socioeconomic dimension correlated with both union status and arrest risk. An Anderson socioeconomic-status index built from the survey does not predict arrest (Online Appendix Table A.4), which weighs against a wealth-based confound.

A third concern is the validity of the name-based match between the survey and AAPP: whether union and non-union workers' matched records differ systematically, and whether the records we match from our survey sample differ from other AAPP records for reasons unrelated to participation. Online Appendix A.3 addresses both.

7 Discussion and framework

Sections 6.1–6.3 documented four facts consistent with unions mobilizing resistance through organizational infrastructure rather than through who they happen to attract or promote to leadership. To interpret these findings, this section sketches a simple model that formalizes this logic. The full model and its derivations are in Appendix D.

7.1 Setup

One leader and N workers decide whether to join a protest. The value of protesting depends on an unobserved state $\theta \in \{0, 1\}$, the political value of taking action — for instance, whether conditions are such that the protest is likely to be safe, effective, or well attended. The leader observes θ directly; workers do not, and can only watch whether the leader herself participates.

The leader's payoff from participating, $a_L \in \{0, 1\}$, combines her own private re-

turn to protesting and a concern for how many of her followers she mobilizes:

$$U_L(a_L \mid \theta) = a_L(\theta - c) + \rho\, E\left[\tfrac{1}{N}\textstyle\sum_i a_i \,\middle|\, a_L\right],$$

where c is the cost of protesting and ρ captures how much the leader values follower participation. Workers' payoffs combine an intrinsic return to protesting, $\alpha\theta$, an idiosyncratic shock ε, and a coordination motive — workers dislike being caught not participating while others around them do:

$$U_i(a_i) = a_i(\alpha\theta + \varepsilon - c) - \lambda\gamma\bar{s}(1 - a_i)m_{-i}^{\beta},$$

where λ is the worker's attachment to the organization, γ the strength of the organization's coordination technology, and m_{-i} the share of other workers who participate. Workers observe neither θ nor ε directly, only a private, near-precise signal of ε and the leader's action; this is enough, by a standard global-games argument, to select a single, well-behaved equilibrium out of what would otherwise be a coordination game with many.

Because workers cannot see θ, what they learn from the leader's action depends on how much they trust her judgment, captured by a precision parameter h. Following participation they revise their belief up, following non-participation down:

$$\mu_1(h) \equiv \Pr(\theta{=}1 \mid a_L{=}1) \;>\; \sigma \;>\; \Pr(\theta{=}1 \mid a_L{=}0) \equiv \mu_0(h),$$

where $\sigma = \Pr(\theta = 1)$ is the unconditional probability that protesting is worthwhile. Expected follower participation conditional on the leader's action collapses to a single reduced-form object,

$$M(a; h, \gamma) = 1 - H\big(c - \alpha\mu_a(h) - \lambda\gamma\bar{s}\,\Psi_N(\beta)\big),$$

the probability that the organization coordinates on participation once the leader has acted.

Under a mild condition on the leader's own cost of protesting relative to how much she values mobilization ($\rho < c < 1$), the leader's decision simplifies to $a_L = \theta$: she participates exactly when doing so is genuinely worthwhile, and this decision does

not depend on organizational capital. Organizational capital cannot make the leader herself more or less willing to protest — it can only change how strongly her followers respond to whatever she does.

7.2 Investment in organizational capital

Before the state is realized, the leader can invest in organizational capital K at cost $C(K; q)$, where q is her own quality. We assume higher-quality leaders build capital more cheaply ($C_{Kq} < 0$): this single assumption is what generates the correlation between leader quality and organizational capacity documented in Section 6.2, and it is the model's only structural link between leader ability and the organization's strength.

What K buys, however, depends on what organizational capital *is*. We consider two interpretations.

Organizational capital as coordination. Suppose K strengthens γ, the organization's coordination technology, while followers' confidence in the leader's judgment (h) is unaffected. Capital then raises expected participation whether or not the leader participates,

$$\frac{\partial M_a^C}{\partial K} > 0 \quad \text{for both } a \in \{0, 1\} :$$

a stronger coordination technology makes it easier for workers to act together regardless of what they infer about θ. Capital and workers' attachment to the organization, λ, are direct complements under this interpretation — more attached workers value coordination more, raising the return to building K — while capital has no direct structural link to workers' own intrinsic motivation α.

Organizational capital as credibility. Suppose instead K raises h, followers' confidence in the leader's judgment, while the coordination technology γ is unaffected. Capital now makes followers more responsive to whatever the leader does, in either direction:

$$\frac{\partial M_1^I}{\partial K} > 0 \qquad \text{but} \qquad \frac{\partial M_0^I}{\partial K} < 0.$$

Investment in credibility raises mobilization when the leader participates but *lowers* it when she does not, because a more trusted leader's inaction is itself stronger dis-

confirming evidence that the state is bad. Here capital has no direct link to λ, but is a direct complement to workers' intrinsic motivation α following participation, and a substitute for it following non-participation.

The sharpest empirical distinction between the two interpretations is the sign of organizational capacity's effect on mobilization when the leader does *not* participate: positive under coordination, negative under credibility.[14]

7.3 Predictions and empirical evidence

The model organizes the empirical evidence in Section 6 without needing to take a stand on which interpretation of organizational capital is at work. The correlation between leader quality and organizational capacity (Section 6.2) is the empirical counterpart of $C_{Kq} < 0$: able leaders can build capacity more cheaply, and so build more of it in equilibrium.

That organizational capacity, rather than leader quality on its own, predicts mobilization (Section 6.3) is what both interpretations predict following leader participation: quality's entire effect on mobilization runs through the capital it makes cheaper to build, not through any direct effect of quality itself. The spillover of leader arrests to non-members as well as members (Section 6.3) is easier to reconcile with capital operating on a coordination technology available to everyone in the factory than with capital operating purely on the credibility of the specific leader who was arrested, though our design does not let us adjudicate between the two directly.

Distinguishing coordination from credibility requires observing mobilization conditional on whether the *specific* leader personally participated in protest, not merely whether she was later arrested — a construct we do not observe directly, since arrest is an imperfect and endogenous proxy for participation (Section 6.4). Testing the model's two remaining distinguishing predictions — whether organizational capacity's return is higher where workers' attachment to the union, λ, is stronger, and whether capital's effect on mobilization interacts with workers' own intrinsic political motivation, α, in the way the credibility channel implies — would require measures of these con-

[14]Two further distinctions follow: coordination generates a structural complementarity between capital and workers' attachment to the union, λ, that credibility does not; and credibility generates a complementarity between capital and workers' intrinsic motivation α — of opposite sign depending on whether the leader participates — that coordination does not. Table D.1 in Appendix D collects the complete set of comparative statics.

structs beyond what we currently have access to. We view this as an agenda for future work in this setting, and, since neither the underlying logic nor these measurement demands are specific to Myanmar or to unions, in others: any organization that can invest in its own capacity to convert latent support into coordinated action faces the same choice between building followers' ability to act together and building their trust in what they are being asked to do.

8 Conclusion

This paper examines how labor unions contributed to pro-democracy resistance following Myanmar's February 2021 military coup. Combining unions' public communications, township-level data on collective action and repression, and individual-level records linking pre-coup garment workers to post-coup political arrests, we show that unions did more than express opposition to the military takeover. They redirected their organizational goals from workplace concerns toward pro-democracy resistance, adopted a more confrontational strategic posture, and helped mobilize political action under high personal risks.

Three findings illustrate how this occurred. First, townships with a stronger pre-coup union presence experienced greater civilian collective action after the coup and subsequently greater state repression. Second, repression fell disproportionately on union presidents, but not simply because unions selected unusually protest-prone workers or charismatic leaders. The individual characteristics that strongly predict who becomes a union president explain little of who is later arrested. Third, we find that mobilization is instead associated with organizational capacity built before the coup. Workers in unions with stronger membership, communication, consultation, and prior mobilization practices were more likely to be arrested, even after accounting for individual characteristics and leader quality. Arrest risk also appears to cascade through unions' organizational structure: the arrest of a leader is associated with a higher arrest risk among workers below her, including non-union workers on the same production line.

Some important limitations qualify these results. Most importantly, we observe arrests rather than mobilization itself. Arrest is a consequential but selective outcome

of political participation: it reflects not only whether an individual participated, but also the visibility and form of that participation, the authorities' targeting decisions, and whether the arrest was documented. Conversely, the absence of an arrest cannot be interpreted as evidence of non-participation. Although the alignment between arrests and the timing and geography of collective action supports our interpretation, the individual-level results show how repression was distributed across workers and organizations, rather than directly estimating unions' effects on participation.

Moreover, although the combination of within-factory comparisons, rich pre-coup individual measures, and organizational-capacity indicators rules out several prominent alternative explanations, it does not rule out the possibility that organizational capacity is correlated with other unobserved factors that also influence mobilization and arrest. The analysis also cannot fully distinguish whether that capacity operates principally by improving coordination among workers or by increasing the credibility of leaders' signals.

The results provide micro-level foundations for the longstanding association between organized labor and democratic resilience. Unions can matter politically not only by changing their members' preferences or selecting people who already hold particular political commitments. They can also build communication channels, relationships of trust, and coordination routines during ordinary periods of workplace bargaining. When a political crisis occurs, this infrastructure can be redirected toward a broader collective objective. In Myanmar, organizational resources originally developed to contest wages and working conditions became resources for resisting authoritarian rule. The political importance of unions may therefore lie partly in organizational capacities accumulated before their political value becomes visible.

More broadly, beyond Myanmar, the findings suggest that democratic resilience depends partly on institutions formed well before democracy comes under threat. By preserving networks through which ordinary people can communicate, coordinate, and act together, civil-society organizations can create a latent capacity for resistance—even when repression makes exercising that capacity exceptionally costly.

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Online Appendix

A Data construction and sample

A.1 Survey sampling and name-cleaning procedures

Honorific removal ("U", "Ma"), multiple-name splitting into columns, gender inferred from names. See main text Section 4.1 for sample sizes by type.

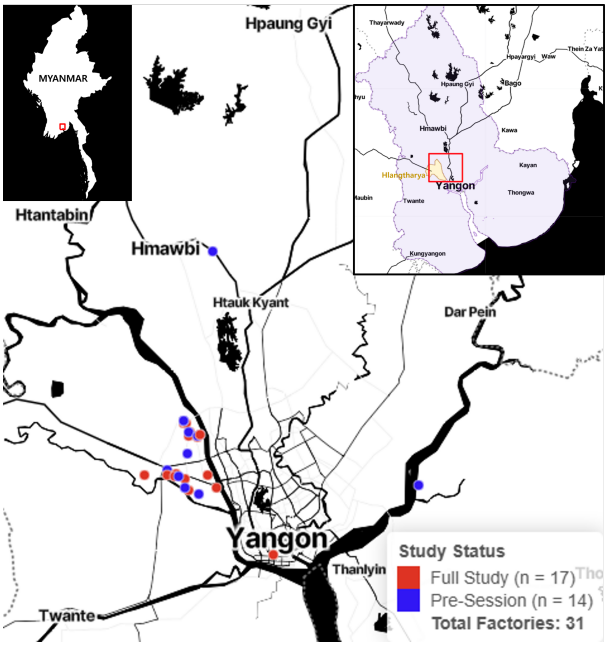


Figure A.1: Factory Locations in the Yangon Region

Notes: Unit of observation is factory. Each dot is one garment factory, placed at its geocoded coordinates; factories whose address could not be geocoded are not shown. Colour marks how far the factory got in the study: red for the factories that completed the full data collection, blue for those that only reached the preliminary session, with the count of each in the legend. The map is centred on the industrial townships north and west of central Yangon, where garment production concentrates. Base map and place labels are Stamen Toner tiles served by Stadia Maps, built on OpenStreetMap data.

A.2 Assistance Association for Political Prisoners (AAPP) records: variables, cleaning, and outcome statistics

Each record reports the prisoner's name in English and in Burmese, gender, age both raw and winsorized, and the names of the parents. Location is given at three levels: town, township, and state or region. Affiliations are coded by sector and by category. Dates cover arrest, sentencing, release and, where applicable, death, each recorded both as a year and as an exact date. The outcomes recorded are whether the person was killed, sentenced to death, given life imprisonment or hard labour, and the number of months imprisoned.

Names are kept in all their variants: where a record lists aliases, these are split into separate fields, up to five in English and five in Burmese, with surrounding whitespace removed.

Full AAPP records

Table A.1: AAPP Outcome Variables: Summary Statistics

	mean	sd	min	max	count
Overall Sentence (months)	98.739	108.851	1	2436	8638
Death Penalty	0.004	0.063	0	1	30908
Life Imprisonment	0.012	0.108	0	1	30908
Killed	0.154	0.361	0	1	30908
Number of Trial(s)	0.192	0.455	0	10	30908
Have ever been sentenced	0.175	0.380	0	1	30908
Number of Sentence(s)	0.595	0.957	0	9	30908
Any Law(s) for Sentence	0.471	0.499	0	1	30908
Number of Law(s) for Sentence	0.545	0.662	0	13	30908

Notes: Unit of observation is a political prisoner recorded by AAPP. The sample is the whole database, 30,908 records, not only the workers matched to our survey. *Overall sentence* is the length of the sentence in months and is defined only for the 8,638 records that carry one, so its mean is conditional on having been sentenced; every other row is defined for all records, and the binary rows are read as shares. *Have ever been sentenced* indicates at least one sentence, so 17.5 per cent of those recorded were sentenced, while 47.1 per cent have at least one law cited against them: a person can be charged without a sentence being recorded. Counts of trials, sentences and laws are zero for anyone with none, which is why their means sit below one.

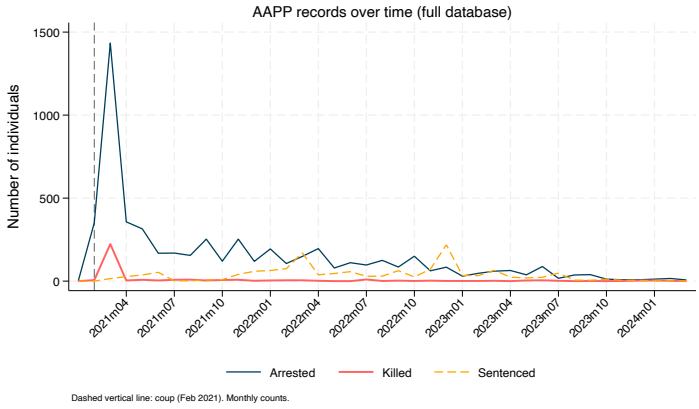


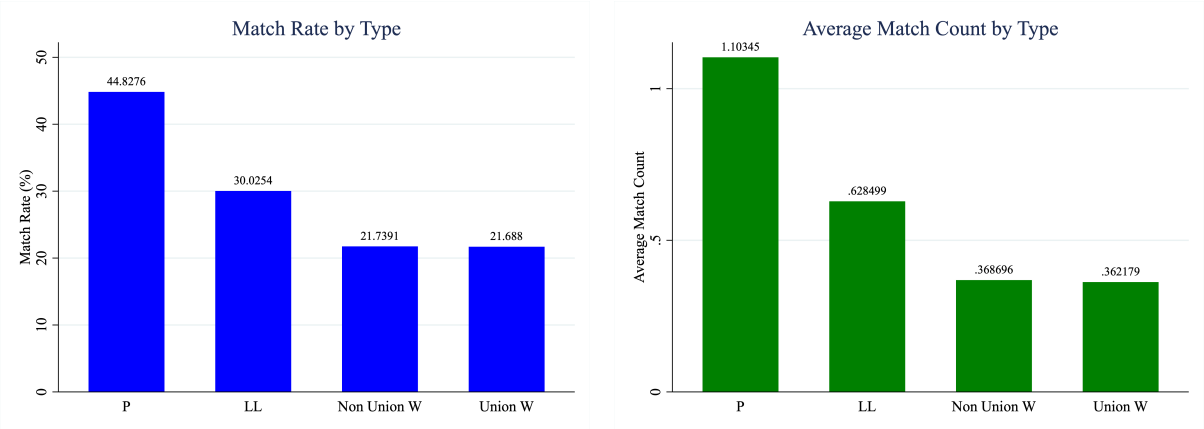
Figure A.2: AAPP Records over Time

Notes: Unit of observation is month. Each line counts the individuals in the AAPP database whose record carries a date in that month: an arrest date, a sentencing date, or, for those recorded as killed, a date of death. Months with no record are shown as zero rather than left out. The dashed vertical line marks the coup of February 2021. The figure covers the whole database, not only the workers matched to our survey.

Matching AAPP with RCT survey

Table A.2: Matching survey invited and participated workers (1,933) to AAPP: match rate by worker type.

	Presidents	Line Leaders	Union Workers	Non-Union Workers
Sample	29	393	936	575
Matched	13	118	203	125
Match rate	44.8%	30.0%	21.7%	21.7%



Extensive: any match (0/1) Intensive: avg. match count

Figure A.3: Match Rate to AAPP by Worker Type

Notes: Unit of observation is worker; the sample is the 1,933 survey workers with a cleaned name. The left panel gives the share of each type matched to at least one AAPP record. The right panel gives the average number of records matched, counting zero for workers with no match, so it combines how many are matched with how many records each matched worker attracts. The ordering is the same in both panels and the gap between leaders and workers is wider on the intensive margin: presidents average 1.10 records against 0.36 for union workers, a ratio of three to one, against two to one on the extensive margin. Part of that gap may reflect name commonness rather than repression, since a worker with a common name attracts more matches; Figure A.4 controls for how often a name appears in the Myan Ku database.

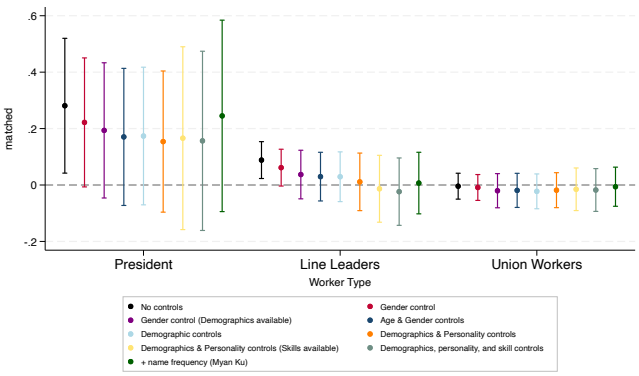


Figure A.4: Arrest Probability by Union Role

Notes: Unit of observation is worker, one observation per worker on the roster of the 17 project factories. The outcome indicates that the worker's name is matched to an AAPP record. Each marker is a coefficient on the worker-type indicator from a separate estimate of equation (6.1); non-union workers are the omitted category and every specification absorbs factory fixed effects. The specifications differ only in the control set, as given in the legend: gender; age and gender; demographics, meaning gender, age, years of education, Raven score, migrant status and tenure in the factory and in the sector; demographics and personality, adding the five Big Five dimensions, grit and the incentivized altruism choice; those plus skills, adding previous sewing efficiency and skill grade; and finally the log of one plus the number of times the worker's name occurs in the Myan Ku list. Two of the specifications, marked *available* in the legend, re-estimate a simpler model on the smaller sample for which the richer controls exist: the gender-only model on workers with complete demographics, and the demographics and personality model on workers with complete skills. Comparing each against its neighbours separates movement due to the added controls from movement due to the change in sample. Bars are 95 percent confidence intervals from heteroskedasticity-robust standard errors. Figure 8 reports the same specifications with the number of matched records as the outcome.

Table A.3: Assessing selection into the AAPP database

	AAPP record characteristic			
	Parent's name	Age recorded	Age	Female
Panel A. Any sampled worker vs. the rest of the database				
In RCT sample	0.009	0.020	1.916	0.382
	(0.025)	(0.026)	(0.832)	(0.025)
Mean, records not in RCT	0.603	0.446	31.251	0.213
Observations	5342	5342	2389	5338
Panel B. By worker type				
RCT & President	0.130	0.221	-2.051	-0.146
	(0.114)	(0.122)	(2.431)	(0.065)
RCT & Line Leader	0.019	0.081	0.599	0.182
	(0.046)	(0.047)	(1.472)	(0.046)
RCT & Union Worker	-0.016	0.025	3.687	0.491
	(0.038)	(0.039)	(1.208)	(0.035)
RCT & Non-union Worker	0.022	-0.092	1.190	0.506
	(0.050)	(0.049)	(1.800)	(0.046)
Mean, records not in RCT	0.603	0.446	31.251	0.213
Observations	5342	5342	2389	5338
Panel C. Within our sample: union vs. non-union arrestees				
Union member	-0.014	-0.005	-0.068	-0.097
	[0.782]	[0.922]	[0.982]	[0.072]
Mean, non-union arrestees	0.705	0.562	34.175	0.821
Observations	381	381	213	381

Notes. Each column takes a characteristic of the AAPP record as the dependent variable. *Parent's name* and *Age recorded* are indicators for the record containing that field; *Age* and *Female* are taken from the record, the former only where recorded. Panels A and B use Sample: AAPP records with an arrest date, restricted to the matchable pool (Yangon or missing region), comparing records belonging to sampled workers against all other records. Panel C uses only sampled workers in the 17 project factories matched to an arrest record, and compares those holding a union role (President, Line Leader or Union Worker) against non-union workers. Panels A and B report heteroskedasticity-robust standard errors in parentheses. Panel C reports wild cluster bootstrap-t p-values (500 reps, Rademacher, seed 329048), clustered on factory, in brackets; records outside our sample have no factory, so the same clustering cannot be applied in Panels A and B. Standard errors and p-values are not comparable as measures of precision. Age in Panel C is the earliest age recorded across a worker's records; in Panels A and B it is the age on the individual record. Coefficients near zero indicate that records enter the database with similarly complete information across groups, which is consistent with little differential selection into it. The workforce is 94 percent female and union roles are already somewhat more male in the roster, so part of the gender difference reflects workforce composition rather than recording practice.

Table A.4: Socioeconomic Status and Arrest

	Arrested (0/1)				
	(1)	(2)	(3)	(4)	(5)
SES index	-0.0394				
	[0.330]				
SES index		-0.0438			
		[0.410]			
SES index			-0.0145		
			[0.664]		
SES index				-0.0090	
				[0.764]	
SES index					-0.0008
					[0.974]
Mean arrested	0.212	0.212	0.212	0.212	0.212
Observations	320	320	320	320	320
Income	Yes	Yes	Yes	Yes	Yes
+ Household structure	No	Yes	Yes	Yes	Yes
+ Resources	No	No	Yes	Yes	Yes
+ Consumption & hunger	No	No	No	Yes	Yes
+ Demographics	No	No	No	No	Yes

Notes: Unit of observation is worker; the sample is the workers who completed the Session-3 household module, held fixed across columns. No president answers that module. All specifications include factory fixed effects. Wild cluster bootstrap-t p-values, clustered on factory, are reported in square brackets. The outcome indicates that the worker is matched to an AAPP record. The regressor is a socioeconomic-status index built in the manner of Anderson (2008): each component is signed so that higher means better off, standardised on the estimation sample, averaged, and the average restandardised to mean zero and unit standard deviation. Components enter cumulatively across columns as recorded in the lower panel. Amount questions asked only of households reporting the item are filled with zero where the household reports none.

Table A.5: Socioeconomic Status and Wages by Worker Type

	N	Mean	SD	Diff. vs non-union	*p*
Panel A. SES index, wages excluded					
Line Leader	65	-0.311	1.081	-0.168	0.342
Union Worker	178	0.081	0.953	-0.001	0.994
Non-union worker	77	0.076	0.997	—	—
Panel B. Base wage					
Line Leader	65	109609	63490	-14977	0.314
Union Worker	178	127992	46146	-8529	0.650
Non-union worker	77	107529	62241	—	—
Panel C. SES index, wages included					
Line Leader	65	-0.343	1.032	-0.222	0.220
Union Worker	178	0.111	0.959	-0.031	0.822
Non-union worker	77	0.034	1.013	—	—

Notes: Unit of observation is worker. Differences come from a regression of the outcome on an indicator for the worker type, with factory fixed effects, so the comparison is between workers in the same factory; the last line of each panel is the reference group and carries no difference. Standard errors are clustered on factory and p-values are obtained by wild cluster bootstrap. Only factories containing both groups identify a difference: 11 of the 15 factories for line leaders and 12 for union workers. Panels A and C report a socioeconomic-status index, standardised to mean zero and unit standard deviation, so that higher values mean better off and differences are read in standard deviations; panel C adds the inverse hyperbolic sine of the base wage as one further component. Panel B reports the base wage itself, in kyat. N and the means describe the whole group, while the differences come from the regression. All three panels use the same workers, namely those who completed the household module; no president answers it.

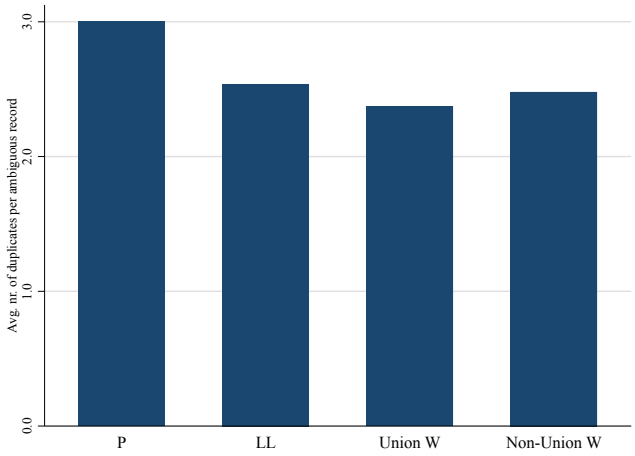


Figure A.5: Ambiguous Matches by Worker Type

Notes: Unit of observation is an AAPP record. A record is ambiguous when the same arrest is linked to more than one survey worker, which happens when workers share a name. The bars give the average number of workers a record is linked to, among ambiguous records only, so the vertical axis starts at one by construction and a value of 2.5 means that a contested record is claimed by two or three workers on average.

A.3 ACLED event-type definitions and maps

Protest dispersion over time

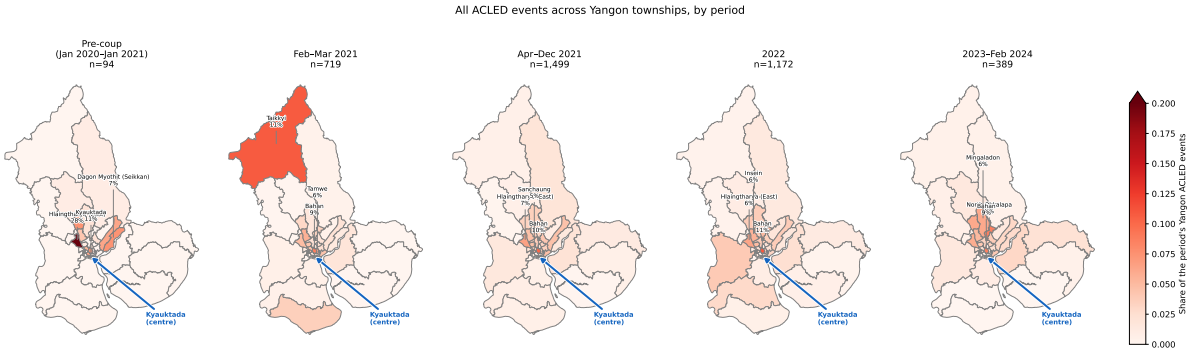


Figure A.6: Where ACLED Events Happen within Yangon, over Time

Notes: Unit of observation is township. Each panel covers one period and shades a township by its share of that period's Yangon ACLED events, so the shares sum to one within a panel: the figure shows how activity is redistributed across the city rather than how much of it there is. The period total appears as n in each panel title, and the three busiest townships of each period are labelled with their share. Events are assigned to townships by a spatial join on the ACLED event coordinates. The blue arrow marks Kyauktada, the protest epicentre. Township polygons are MIMU adm3 boundaries; the Coco Islands are omitted.

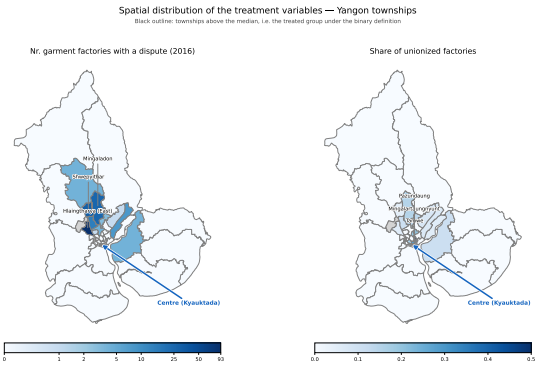


Figure A.7: Union Presence across Yangon Townships

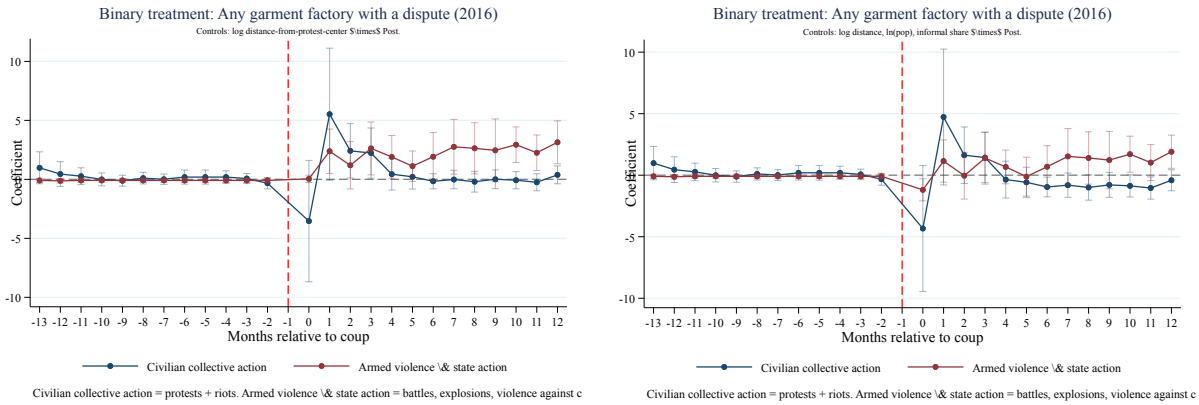
Notes: Unit of observation is township. The two panels shade Yangon townships by the two measures of pre-coup union presence used in the event study of Section 5: the left panel by the number of garment factories in the township that recorded a labour dispute in 2016, and the right panel by the share of its garment factories that were unionised. Both are shown here in their continuous form; the event study splits each at its median, which is zero, so the estimating sample compares townships with any such factory against townships with none. Township polygons are MIMU adm3 boundaries. Townships with no garment factory take the value zero and are therefore shaded like townships that have factories but no union presence.

A.4 ACLED event studies: additional specifications

The main text reports the binary treatments without controls. This subsection reports the same event studies with Post-interacted controls, with continuous treatments, on samples excluding outlying townships, and disaggregated by event type. All use the monthly Yangon township panel, January 2020 to February 2022, with township and month fixed effects and standard errors clustered on township; event time is in months relative to the coup, with the month before the coup as reference. Outcomes are *civilian collective action* (protests and riots) and *armed violence and state action* (battles, explosions, violence against civilians, strategic developments). Controls enter interacted with Post, their levels absorbed by the fixed effects: "distance" is log distance to Kyauktada; "full" adds log population and the 2019 informal manufacturing share.

Full sample, with controls

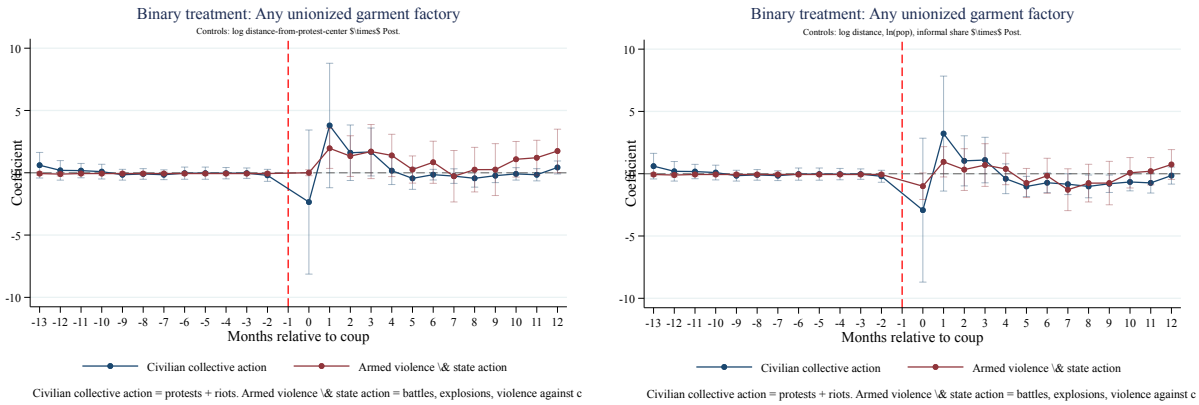
Binary and continuous treatments, adding the geographic and demographic controls to the specifications reported in the main text. The left panel adds log distance to the protest epicentre interacted with post-coup; the right panel adds log population and the 2019 informal-manufacturing share as well.



Distance × Post Full controls

Figure A.8: Any Garment Factory with a 2016 Dispute, with Controls

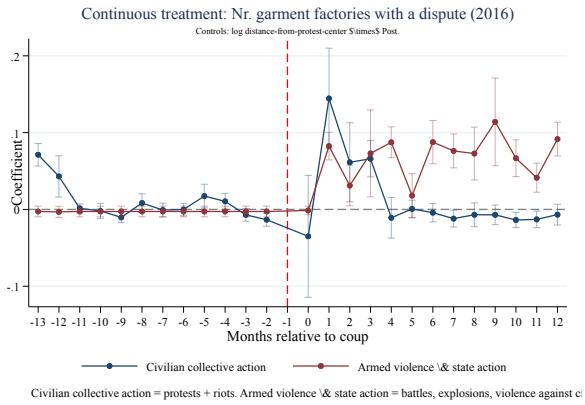
Notes: Unit of observation is township-month. Each point is $\hat{\beta}_k$, the differential change in the outcome in townships with a stronger pre-coup union presence in month k relative to the coup of February 2021; the omitted month is the month before the coup. The treatment indicates that at least one garment factory in the township recorded a labour dispute in 2016. Each panel plots two outcomes constructed from ACLED: *civilian collective action*, which pools protests and riots, and *armed violence and state action*, which pools battles, explosions and remote violence, violence against civilians, and strategic developments. All specifications include township and year-month fixed effects. The left panel adds log distance to Kyauktada, the protest epicentre, interacted with a post-coup indicator; the right panel adds log population and the 2019 informal-manufacturing employment share, each also interacted with post-coup. Standard errors are clustered on township and bands are 95 percent confidence intervals. The sample runs from January 2020 to February 2022.



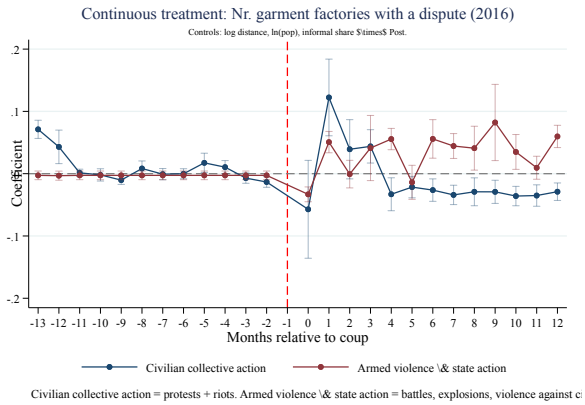
Distance × Post Full controls

Figure A.9: Any Unionized Garment Factory, with Controls

Notes: As Figure A.8, with the treatment indicating that at least one garment factory in the township was unionized.



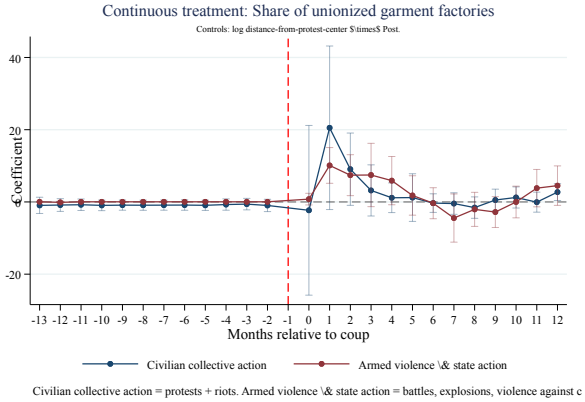
Distance × Post



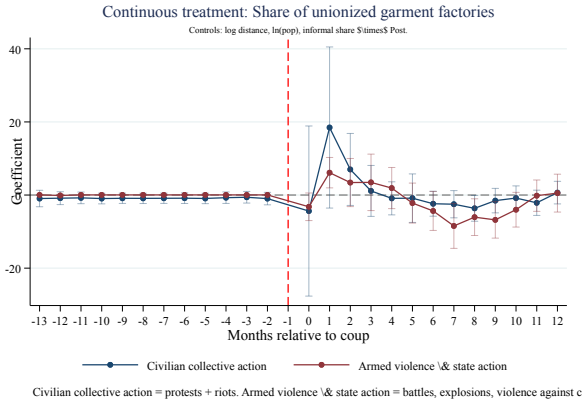
Full controls

Figure A.10: Number of Garment Factories with a 2016 Dispute, with Controls

Notes: As Figure A.8, with the treatment entering as the number of garment factories in the township that recorded a labour dispute in 2016 rather than as an indicator, so that a coefficient is the effect of one additional such factory.



Distance × Post



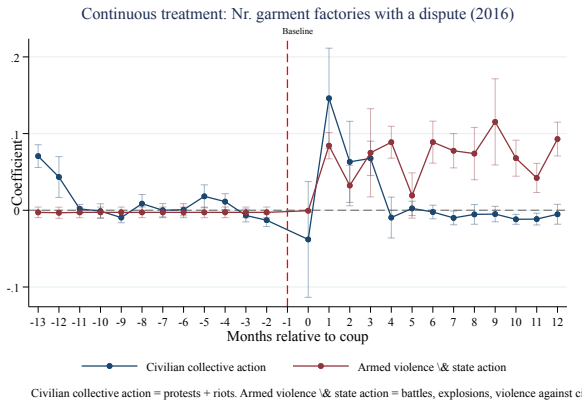
Full controls

Figure A.11: Share of Unionized Garment Factories, with Controls

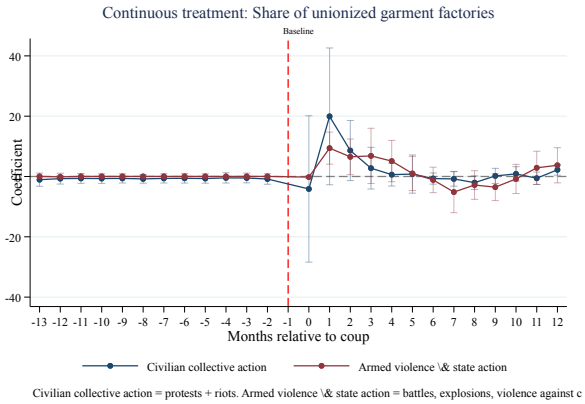
Notes: As Figure A.8, with the treatment entering as the share of the township's garment factories that were unionized rather than as an indicator, so that a coefficient is the effect of a one-unit increase in that share.

Full sample, continuous treatments

The treatment enters as a count or a share rather than an indicator, so the coefficients are the effect of one additional factory with a dispute, or of a one-unit increase in the unionized share.



Factories with a dispute



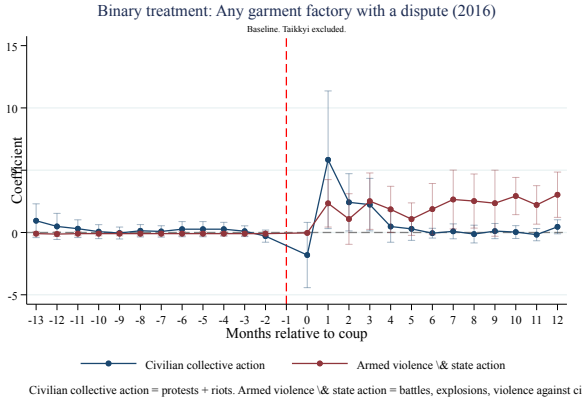
Share unionized

Figure A.12: Continuous Treatments, No Controls

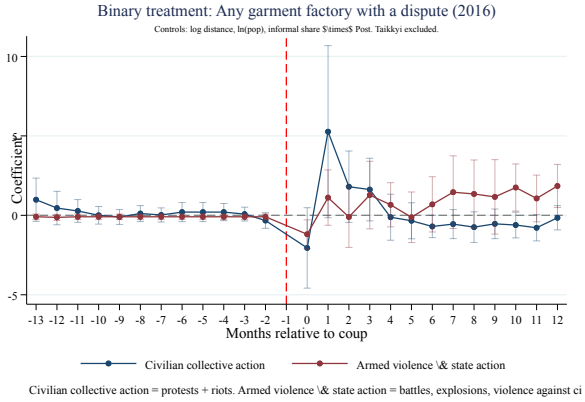
Notes: As Figure A.8, without the geographic and demographic controls. The left panel measures union presence by the number of garment factories in the township that recorded a labour dispute in 2016; the right panel, by the share of its garment factories that were unionized.

Excluding Taikkyi

Taikkyi lies far from the city centre yet accounts for a high share of events in the dispersion map (Figure A.6). The figures below drop it from the estimation sample.



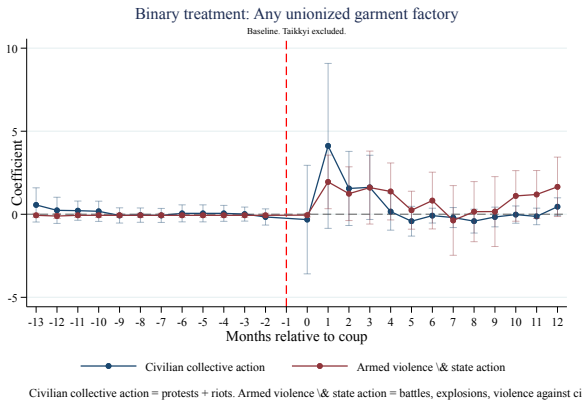
No controls

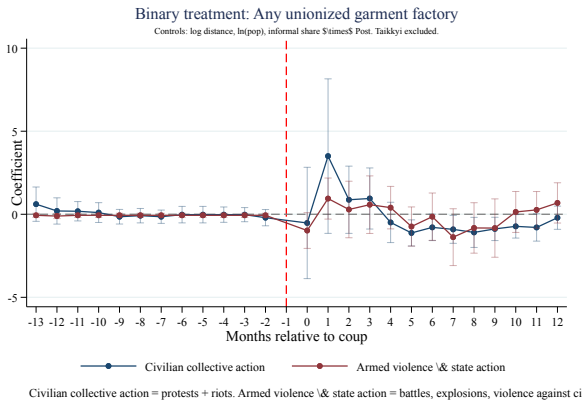


Full controls

Figure A.13: Any Garment Factory with a 2016 Dispute, Taikkyi Excluded

Notes: As Figure A.8, with Taikkyi dropped from the estimation sample. The left panel has no controls and the right panel the full set.

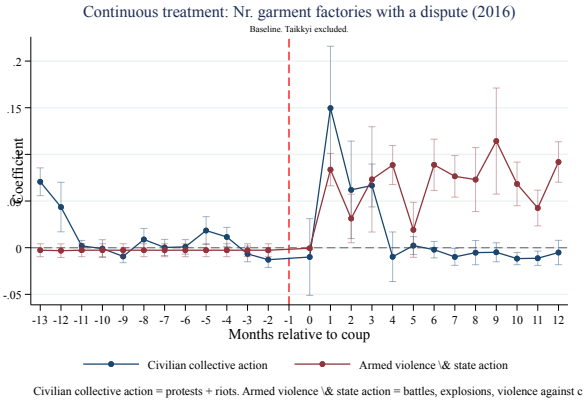


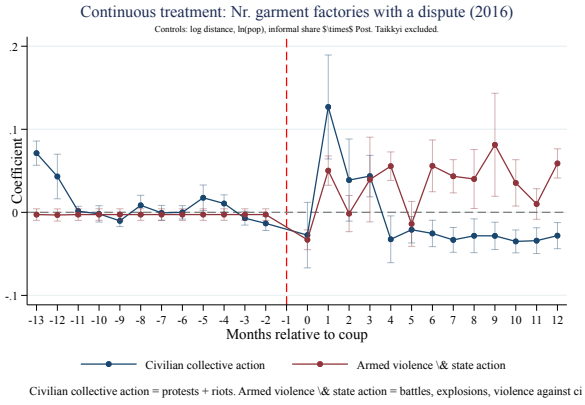


No controls Full controls

Figure A.14: Any Unionized Garment Factory, Taikkyi Excluded

Notes: As Figure A.9, with Taikkyi dropped from the estimation sample. The left panel has no controls and the right panel the full set.

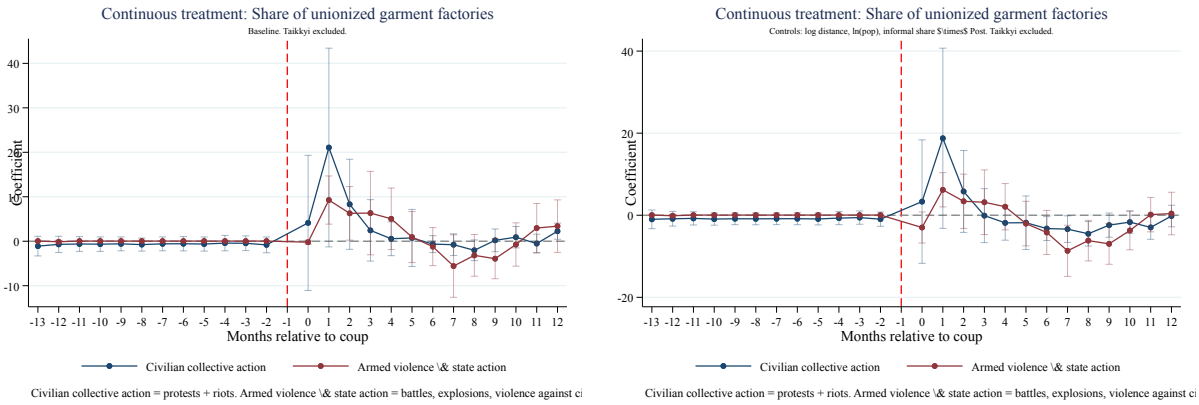




No controls Full controls

Figure A.15: Number of Garment Factories with a 2016 Dispute, Taikkyi Excluded

Notes: As Figure A.10, with Taikkyi dropped from the estimation sample. The left panel has no controls and the right panel the full set.



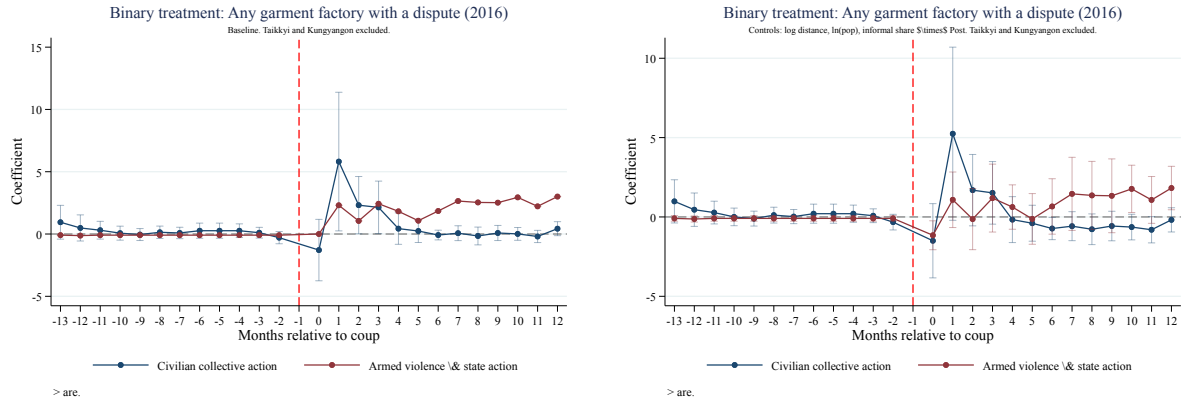
No controls Full controls

Figure A.16: Share of Unionized Garment Factories, Taikkyi Excluded

Notes: As Figure A.11, with Taikkyi dropped from the estimation sample. The left panel has no controls and the right panel the full set.

Excluding Taikkyi and Kungyangon

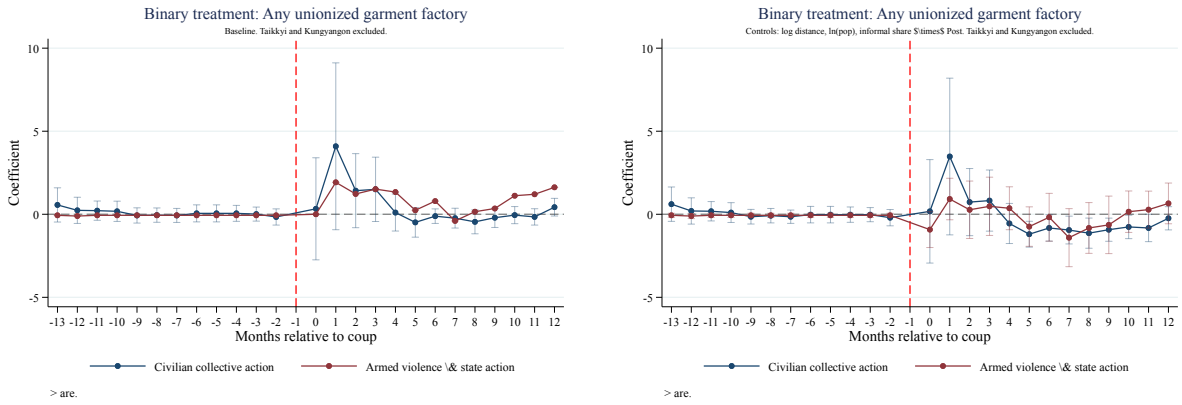
Kungyangon, in the far south of the region, is the second outlying township on the same criterion. The figures below drop both.



No controls Full controls

Figure A.17: Any Garment Factory with a 2016 Dispute, Taikkyi and Kungyangon Excluded

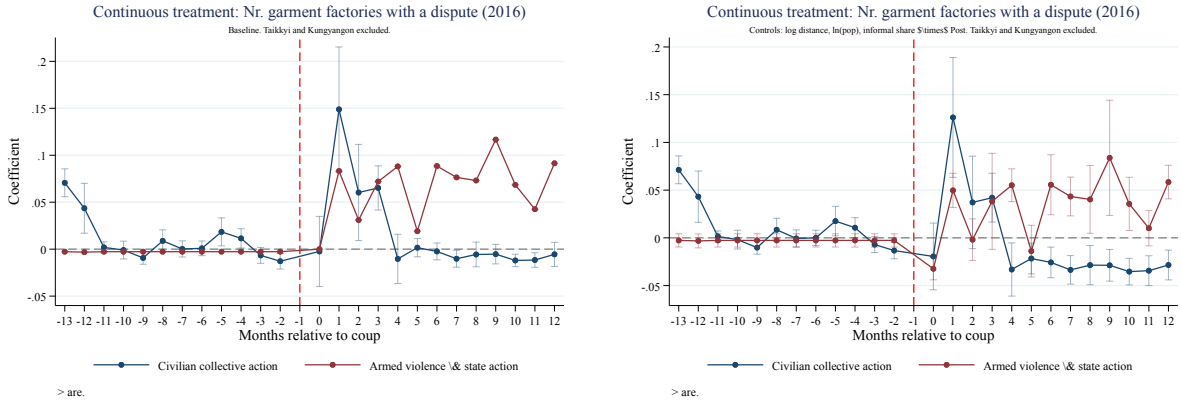
Notes: As Figure A.13, with Kungyangon also dropped from the estimation sample.



No controls Full controls

Figure A.18: Any Unionized Garment Factory, Taikkyi and Kungyangon Excluded

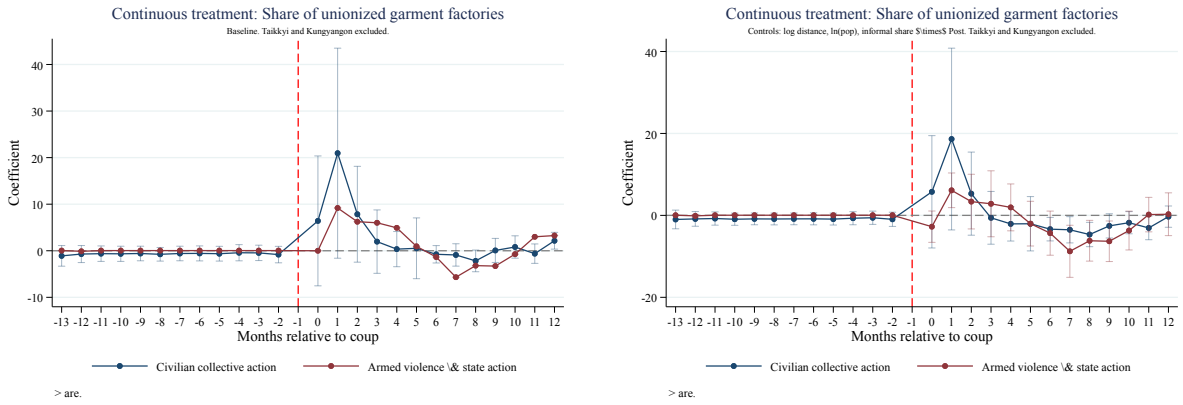
Notes: As Figure A.14, with Kungyangon also dropped from the estimation sample.



No controls Full controls

Figure A.19: Number of Garment Factories with a 2016 Dispute, Taikkyi and Kungyangon Excluded

Notes: As Figure A.15, with Kungyangon also dropped from the estimation sample.



No controls Full controls

Figure A.20: Share of Unionized Garment Factories, Taikkyi and Kungyangon Excluded

Notes: As Figure A.16, with Kungyangon also dropped from the estimation sample.

A.5 Township/factory-level garment and union database

Constructed from the Myanmar Garment Manufacturers Association, the Myan Ku database, and union-federation Facebook lists; cross-checked for coverage of ∼400 Yangon factories.

A.6 Myan Ku disbursement program

Used solely to construct the name-frequency control in Section A.3 above (name commonness, not a substantive outcome).

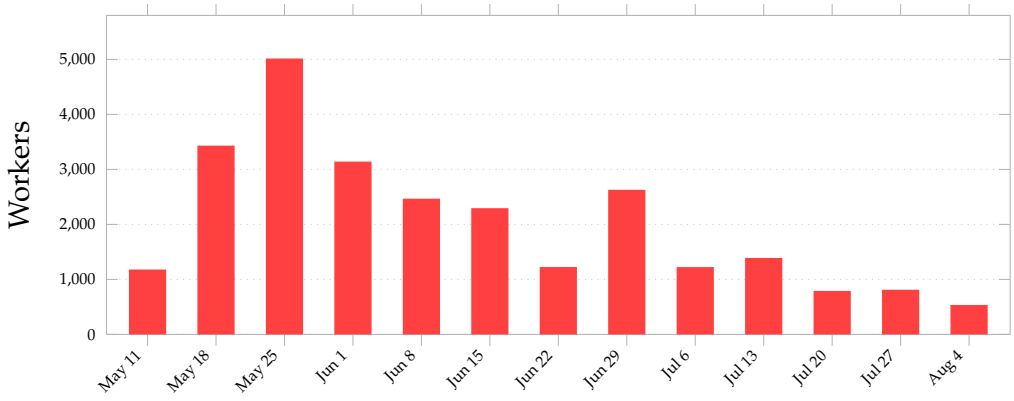


Figure A.21: Myan Ku: disbursement waves, May–Aug. 2020. Total 26,141 workers across 13 waves.

B Additional figures and tables

B.1 Figures

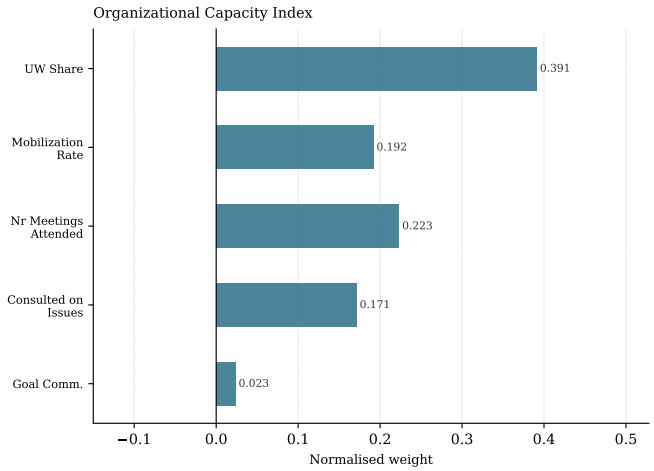


Figure B.1: Component Weights in the Organizational Capacity Index

Notes: Unit of observation is factory. The bars are the weights the five components receive in the organizational-capacity index, built following Anderson (2008): each component is standardised across factories, the covariance matrix of the standardised components is inverted, and each component's weight is the corresponding row sum of the inverse, normalised to sum to one. Components that carry information the others do not therefore receive more weight than components that duplicate one another. The five components are the ratio of union to non-union workers among the surveyed workers, the share of union workers who took part in the minimum-wage survey, the average number of union meetings attended, the share of workers reporting that they were consulted on union issues, and the share reporting that leaders communicate the union's goals. The index is built on the factories with a complete set of components. A version that also includes the ratio of line leaders to non-union workers is not used in the paper, since that ratio is a staffing choice rather than a measure of capacity.

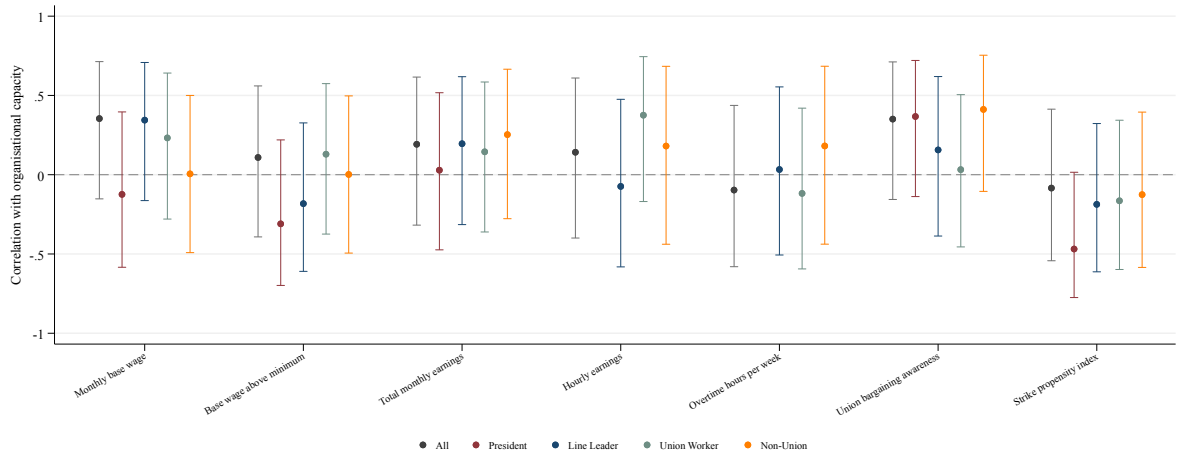
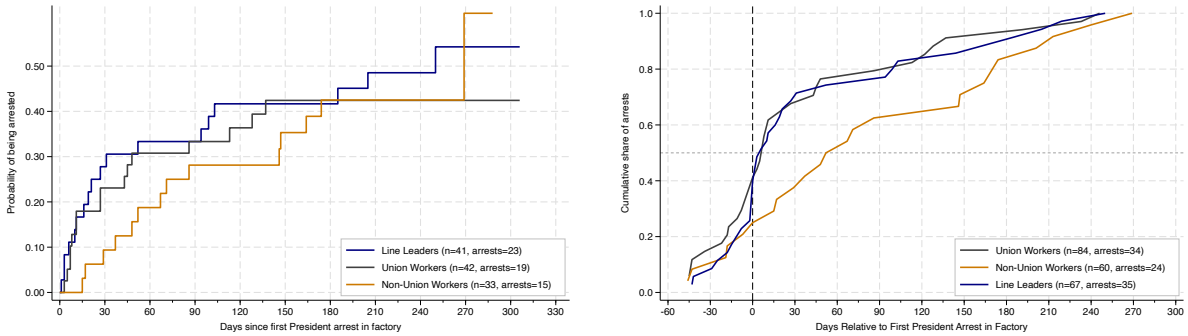


Figure B.2: Correlates of Organizational Capacity

Notes: Unit of observation is factory, and the sample is the 17 project factories. Organizational capacity is a factory-level index, so each marker is a Pearson correlation across factories between that index and a factory mean of the worker variable on the horizontal axis; bars are 95 percent confidence intervals obtained from the Fisher z transformation. The worker variable is averaged separately within each worker type and, for the series labelled *All*, over all workers in the factory. A correlation is not reported when fewer than eight factories have a value for that cell, so the number of factories behind a marker varies across the figure. Monthly base wage, total monthly earnings and hourly earnings are in kyat; earnings below 50,000 kyat a month are treated as missing, and hourly earnings divide total earnings by hours actually worked, including overtime. *Base wage above minimum* indicates a monthly base wage above 144,000 kyat. *Union bargaining awareness* counts, out of six, the issues on which the respondent believes the union negotiated, using the question block asked of that worker's role. *Strike propensity* averages three standardised items: whether strikes are seen as the only way to be heard, whether they are seen as risking closure, reverse-coded, and the log of one plus the number of strikes in the past two years; the items are standardised within worker type, so the series reflects variation across factories rather than the fact that leaders organise strikes and other workers do not.

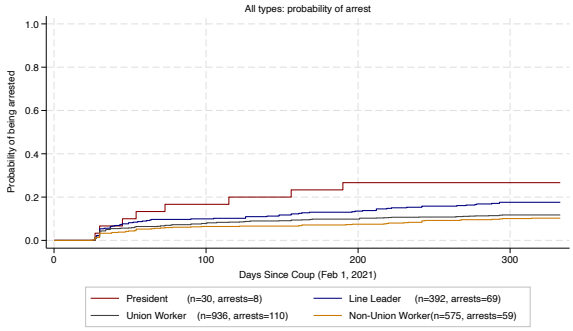


Days since first president arrest

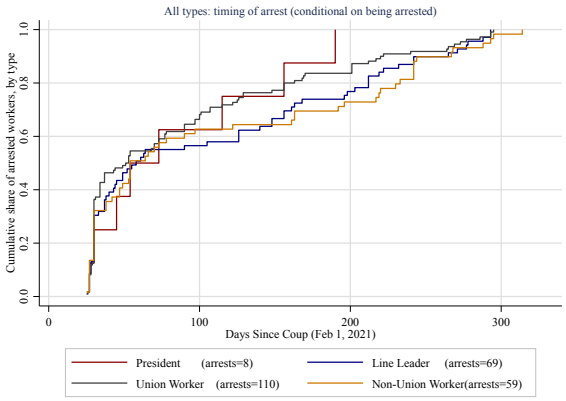
Cumulative gap distribution

Figure B.3: Within-Factory Sequencing Relative to the First President Arrest

Notes: Unit of observation is worker. The sample is the line leaders, union workers and non-union workers employed in factories where a president was arrested; presidents themselves are excluded. Time zero is the first arrest of that factory's president, and a worker's position on the horizontal axis is the number of days between that date and the worker's own first arrest. A worker matched to several arrest records enters once, at the earliest; a worker matched to a record with no usable arrest date is dropped. The two panels differ in their denominator. The left panel is a Kaplan–Meier failure curve and gives the probability that a worker has been arrested by a given number of days after the president: all workers in these factories enter the risk set at time zero and are followed until arrest or until 31 December 2021, so the curve accounts for factories whose president was arrested late being observed for less time. Workers arrested before their president are outside the risk set on this construction and do not appear in that panel. The right panel conditions on being arrested and describes when: among arrested workers only, it plots the cumulative share whose arrest fell within a given number of days of the president's, so each curve reaches one and negative values are workers arrested before their president. The window runs from 60 days before to 300 days after. Legends report the number of workers and the number of arrests behind each curve.



Probability, by type



Timing, conditional on arrest

Figure B.4: Time to First Arrest by Worker Type

Notes: Unit of observation is worker, and the sample is the full survey roster, so workers never matched to an AAPP record are retained as censored rather than dropped. A worker matched to several arrests enters once, at the earliest. Time zero is the coup of 1 February 2021 and observation ends on 31 December 2021, so a worker not arrested by that date is censored there. The left panel is a Kaplan–Meier failure curve and gives the probability that a worker of each type has been arrested by a given number of days after the coup, with the never-arrested in the denominator throughout. The right panel conditions on being arrested and describes when: among arrested workers only, it plots the cumulative share arrested by that day, so each curve reaches one and the distance between curves reflects timing rather than incidence. Legends report the number of workers at risk and the number of arrests behind each curve, and in the right panel the number of arrests alone.

B.2 Tables

Table B.1

	N	Mean	SD	Min	p25	Median	p75	Max
Panel A: Size and Gender								
Total workers	19	1156	646	450	759	1060	1250	2860
Total female workers	18	1000	601	375	685	918	1080	2505
Inferred male workers	18	184	171	5	50	150	210	596
Female share (%)	18	84	14	44	80	87	93	99
Panel B: Role								
Total helpers	18	202	184	15	70	140	266	676
Total supervisors	19	52	51	18	23	30	56	212
Total operators (inferred)	18	940	515	392	629	788	1047	2284
Panel C: Union								
Total union members	19	478	412	80	290	325	610	1938
Total non-union workers (inferred)	19	679	541	160	360	610	850	2560
Union members (share of total workers) (%)	19	43	24	10	24	32	66	77
Union line leaders	17	30	30	7	15	23	28	132

Unit of observation: factory (N = 19). Operators inferred as total minus helpers minus supervisors.

Table B.2: Summary statistics, township-level ACLED analysis sample.

Table B.3: Township Summary Statistics

	N	Mean	SD	Median	Min	Max
Panel A. Treatment						
Labour disputes (2016)	43	9.47	35.16	0.00	0.00	220.00
Factories with a dispute (2016)	43	4.42	15.27	0.00	0.00	93.00
Unionization share	43	0.06	0.11	0.00	0.00	0.50
Binary: any factory with a dispute	43	0.26	0.44	0.00	0.00	1.00
Binary: any unionized factory	43	0.37	0.49	0.00	0.00	1.00
Panel B. Controls						
Log distance to Kyauktada (km)	42	2.30	1.17	2.34	−0.47	4.36
Log population (2019)	43	11.72	0.78	12.01	10.15	13.00
Informal manufacturing share (2019)	43	0.07	0.16	0.02	0.00	0.85

Notes: Unit of observation is township; treatment and controls are fixed before the coup, so the township-month panel is collapsed to its cross-section. Panel A reports the treatments: three continuous measures and, indented, the two above-median indicators used as the binary baselines. All three continuous measures have a median of zero, so each indicator separates townships with any dispute or any unionized factory from those with none: 11 of the 43 townships on the dispute measure and 16 on the unionization share. *Factories with a dispute* counts only the garment factories that recorded one in 2016, not the township's garment sector, so it measures dispute activity rather than sector size. Townships with no garment factory are coded as having a zero unionization share, which puts both treatments on the same 43 townships. Panel B reports the controls, each interacted with an after-coup indicator in the regressions. Distance runs from the township centroid to Kyauktada, the downtown protest centre, using MIMU adm3 centroids; Kyauktada is at zero distance and drops from the log. Population and the share of residents in manufacturing and handicrafts come from the 2019 census.

Table B.4: Organisational capacity predicts higher worker mobilization.

	Pr name matched to AAPP					
	(1)	(2)	(3)	(4)	(5)	(6)
Panel A: Organisational capacity (all workers pooled)						
High Organisational Capacity	0.043	0.030	0.033	0.035	0.056	0.049
	[0.044]	[0.128]	[0.170]	[0.180]	[0.044]	[0.062]
Number of obs.	1800	1800	1070	1070	759	759
Mean Dep. Var. (low-capacity workers)	0.207	0.207	0.202	0.202	0.196	0.196
Nr. distinct factories	17	17	17	17	17	17
Panel B: Adding president quality						
High Organisational Capacity	0.039	0.028	0.041	0.044	0.059	0.054
	[0.182]	[0.328]	[0.134]	[0.164]	[0.052]	[0.064]
High-Quality President	0.011	0.008	-0.033	-0.037	-0.013	-0.022
	[0.676]	[0.774]	[0.354]	[0.330]	[0.708]	[0.448]
Number of obs.	1800	1800	1070	1070	759	759
Mean Dep. Var. (low-capacity workers)	0.207	0.207	0.202	0.202	0.196	0.196
Nr. distinct factories	17	17	17	17	17	17
Gender control	No	Yes	Yes	Yes	Yes	Yes
Demographic controls	No	No	Yes	Yes	Yes	Yes
Personality controls	No	No	No	Yes	Yes	Yes
Skills controls	No	No	No	No	Yes	No

Notes: Unit of observation is worker. The specifications include no factory fixed effects, since the treatment varies only across factories; the comparison is therefore between factories rather than within them. Wild cluster bootstrap-t p-values, clustered on factory, are reported in square brackets and are based on 500 replications with Rademacher weights and seed 329048. The outcome indicates that the worker's name is matched to an AAPP record. *High organisational capacity* indicates a factory above the median of the inverse-covariance-weighted index of Anderson (2008), built from five components: the ratio of union to non-union workers, the rate of mobilisation around the minimum wage, meeting attendance, consultation of members, and leadership goal communication. *President quality* is the maximum, over a factory's presidents, of a nine-trait composite of the five Big Five dimensions with neuroticism reversed, the Raven score, grit, prosociality and locus of control, each standardised across workers; factories are split at its median. Presidents are excluded and all remaining workers are pooled; the omitted category is workers in low-capacity factories, and the mean of the dependent variable is reported for that group. Panel B adds president quality and reports its coefficient, so the capacity estimate in that panel is net of president quality and the president-quality estimate is net of capacity. Columns 1 through 5 add controls progressively, as recorded in the lower panel; column 6 repeats the column 4 controls on the column 5 sample, so that a change between columns 5 and 6 reflects the controls rather than the sample.

Table B.5: President quality alone does not predict higher worker mobilization.

	N of times name matched to AAPP					
	(1)	(2)	(3)	(4)	(5)	(6)
High-Quality President	0.059	0.033	0.002	-0.007	0.029	0.019
	[0.308]	[0.402]	[0.972]	[0.890]	[0.648]	[0.722]
R-squared	0.001	0.067	0.031	0.042	0.061	0.054
Number of obs.	1812	1812	1077	1077	762	762
Nr. distinct factories	18	18	18	18	18	18
Mean Dep. Var. (omitted cell)	0.378	0.378	0.360	0.360	0.369	0.369
Gender control	No	Yes	Yes	Yes	Yes	Yes
Demographic controls	No	No	Yes	Yes	Yes	Yes
Personality controls	No	No	No	Yes	Yes	Yes
Skills controls	No	No	No	No	Yes	No

Notes: Unit of observation is worker. The specifications include no factory fixed effects, since the treatment varies only across factories; the comparison is therefore between factories rather than within them. Wild cluster bootstrap-t p-values, clustered on factory, are reported in square brackets and are based on 500 replications with Rademacher weights and seed 329048. The outcome is the number of AAPP records matched to the worker's name, which may partly reflect how common the name is; see the text. *President quality* is the maximum, over a factory's presidents, of a nine-trait composite of the five Big Five dimensions with neuroticism reversed, the Raven score, grit, prosociality and locus of control, each standardised across workers; factories are split at its median. Presidents are excluded and all remaining workers are pooled; the omitted category is workers in factories with a below-median president, and the mean of the dependent variable is reported for that group. Columns 1 through 5 add controls progressively, as recorded in the lower panel; column 6 repeats the column 4 controls on the column 5 sample, so that a change between columns 5 and 6 reflects the controls rather than the sample.

Table B.6: Heterogeneity by organizational capacity, split by worker type (wild-cluster bootstrap SEs).

	Pr name matched to AAPP					
	(1)	(2)	(3)	(4)	(5)	(6)
Line Leader × High Organisational Capacity	0.151	0.112	0.100	0.106	0.097	0.091
	[0.000]	[0.014]	[0.052]	[0.050]	[0.196]	[0.194]
Line Leader × Low Organisational Capacity	0.072	0.058	0.057	0.066	0.054	0.051
	[0.362]	[0.500]	[0.550]	[0.506]	[0.634]	[0.642]
Union Worker × High Organisational Capacity	0.036	0.027	0.035	0.048	0.085	0.072
	[0.186]	[0.330]	[0.394]	[0.288]	[0.088]	[0.164]
Union Worker × Low Organisational Capacity	0.043	0.040	0.031	0.049	0.068	0.061
	[0.120]	[0.168]	[0.520]	[0.302]	[0.286]	[0.348]
Non-Union Worker × High Organisational Capacity	0.084	0.078	0.084	0.103	0.137	0.125
	[0.072]	[0.092]	[0.100]	[0.066]	[0.024]	[0.024]
Number of obs.	1800	1800	1070	1070	759	759
Mean Dep. Var. (omitted cell)	0.178	0.178	0.170	0.170	0.150	0.150
Nr. distinct factories	17	17	17	17	17	17
p: High = Low, Line Leaders	0.228	0.480	0.626	0.652	0.702	0.708
p: High = Low, Union Workers	0.808	0.580	0.920	0.974	0.606	0.754
Gender control	No	Yes	Yes	Yes	Yes	Yes
Demographic controls	No	No	Yes	Yes	Yes	Yes
Personality controls	No	No	No	Yes	Yes	Yes
Skills controls	No	No	No	No	Yes	No

Notes: Unit of observation is worker. The specifications include no factory fixed effects, since the treatment varies only across factories; the comparison is therefore between factories rather than within them. Wild cluster bootstrap-t p-values, clustered on factory, are reported in square brackets and are based on 500 replications with Rademacher weights and seed 329048. The outcome indicates that the worker's name is matched to an AAPP record. *High organisational capacity* indicates a factory above the median of the inverse-covariance-weighted index of Anderson (2008), built from five components: the ratio of union to non-union workers, the rate of mobilisation around the minimum wage, meeting attendance, consultation of members, and leadership goal communication. Presidents are excluded and the coefficients are worker-type indicators interacted with capacity; the omitted category is non-union workers in low-capacity factories, and the mean of the dependent variable is reported for that cell. Columns 1 through 5 add controls progressively, as recorded in the lower panel; column 6 repeats the column 4 controls on the column 5 sample, so that a change between columns 5 and 6 reflects the controls rather than the sample. The final two rows report the p-value of a test that the high- and low-capacity interactions are equal, for line leaders and for union workers; both are estimated in the same regression, so the test is on the difference itself. Non-union workers in low-capacity factories are the omitted category, so no such test is available for them.

Table B.7: Heterogeneity by organizational capacity, by type, count outcome (WCB).

	N of times name matched to AAPP					
	(1)	(2)	(3)	(4)	(5)	(6)
Line Leader × High Organisational Capacity	0.476	0.301	0.232	0.230	0.240	0.235
	[0.000]	[0.004]	[0.064]	[0.132]	[0.252]	[0.248]
Line Leader × Low Organisational Capacity	0.183	0.119	0.112	0.118	0.069	0.058
	[0.122]	[0.324]	[0.538]	[0.474]	[0.714]	[0.714]
Union Worker × High Organisational Capacity	0.087	0.042	0.068	0.091	0.156	0.134
	[0.050]	[0.346]	[0.234]	[0.152]	[0.058]	[0.038]
Union Worker × Low Organisational Capacity	0.122	0.109	0.081	0.120	0.165	0.157
	[0.018]	[0.034]	[0.312]	[0.122]	[0.164]	[0.148]
Non-Union Worker × High Organisational Capacity	0.231	0.203	0.191	0.225	0.295	0.277
	[0.064]	[0.070]	[0.094]	[0.048]	[0.048]	[0.042]
Number of obs.	1800	1800	1070	1070	759	759
Mean Dep. Var. (omitted cell)	0.260	0.260	0.244	0.244	0.221	0.221
Nr. distinct factories	17	17	17	17	17	17
p: High = Low, Line Leaders	0.030	0.120	0.526	0.536	0.372	0.348
p: High = Low, Union Workers	0.540	0.204	0.836	0.618	0.880	0.730
Gender control	No	Yes	Yes	Yes	Yes	Yes
Demographic controls	No	No	Yes	Yes	Yes	Yes
Personality controls	No	No	No	Yes	Yes	Yes
Skills controls	No	No	No	No	Yes	No

Notes: Unit of observation is worker. The specifications include no factory fixed effects, since the treatment varies only across factories; the comparison is therefore between factories rather than within them. Wild cluster bootstrap-t p-values, clustered on factory, are reported in square brackets and are based on 500 replications with Rademacher weights and seed 329048. The outcome is the number of AAPP records matched to the worker's name, which may partly reflect how common the name is; see the text. *High organisational capacity* indicates a factory above the median of the inverse-covariance-weighted index of Anderson (2008), built from five components: the ratio of union to non-union workers, the rate of mobilisation around the minimum wage, meeting attendance, consultation of members, and leadership goal communication. Presidents are excluded and the coefficients are worker-type indicators interacted with capacity; the omitted category is non-union workers in low-capacity factories, and the mean of the dependent variable is reported for that cell. Columns 1 through 5 add controls progressively, as recorded in the lower panel; column 6 repeats the column 4 controls on the column 5 sample, so that a change between columns 5 and 6 reflects the controls rather than the sample. The final two rows report the p-value of a test that the high- and low-capacity interactions are equal, for line leaders and for union workers; both are estimated in the same regression, so the test is on the difference itself. Non-union workers in low-capacity factories are the omitted category, so no such test is available for them.

Table B.8: Organisational Capacity by Whether the President Was Arrested

	N of times name matched to AAPP					
	(1)	(2)	(3)	(4)	(5)	(6)
Panel A: Factories where the president was arrested						
High Organisational Capacity	0.185	0.121	0.094	0.071	0.090	0.067
	[0.014]	[0.056]	[0.104]	[0.164]	[0.076]	[0.102]
Number of obs.	971	971	594	594	424	424
Mean Dep. Var. (low-capacity workers)	0.289	0.289	0.298	0.298	0.320	0.320
Nr. distinct factories	9	9	9	9	9	9
Panel B: Factories where the president was not arrested						
High Organisational Capacity	0.054	0.012	0.074	0.067	0.127	0.133
	[0.453]	[0.789]	[0.320]	[0.422]	[0.023]	[0.172]
Number of obs.	829	829	476	476	335	335
Mean Dep. Var. (low-capacity workers)	0.397	0.397	0.333	0.333	0.285	0.285
Nr. distinct factories	8	8	8	8	8	8
Panel C: The difference, from the interacted model						
High Capacity × Split	0.130	0.099	-0.003	-0.018	-0.059	-0.044
	[0.230]	[0.196]	[0.958]	[0.832]	[0.336]	[0.644]
Number of obs.	1800	1800	1070	1070	759	759
Nr. distinct factories	17	17	17	17	17	17

Notes: Unit of observation is worker. The specifications include no factory fixed effects, since the treatment varies only across factories; the comparison is therefore between factories rather than within them. Wild cluster bootstrap-t p-values, clustered on factory, are reported in square brackets and are based on 500 replications with Rademacher weights and seed 329048. The outcome is the number of AAPP records matched to the worker's name, which may partly reflect how common the name is; see the text. *High organisational capacity* indicates a factory above the median of the inverse-covariance-weighted index of Anderson (2008), built from five components: the ratio of union to non-union workers, the rate of mobilisation around the minimum wage, meeting attendance, consultation of members, and leadership goal communication. Presidents are excluded and all remaining workers are pooled; the omitted category is workers in low-capacity factories, and the mean of the dependent variable is reported for that group. The sample is split by whether the factory's president was arrested. Panels A and B estimate the capacity effect separately in each group; Panel C reports the coefficient on the interaction of capacity with the split, estimated on the pooled sample, so the difference between the two panels is tested directly rather than as two independent estimates. Columns 1 through 5 add controls progressively, as recorded in the lower panel; column 6 repeats the column 4 controls on the column 5 sample, so that a change between columns 5 and 6 reflects the controls rather than the sample.

Table B.9: Organisational Capacity by Line-Leader Arrests

	N of times name matched to AAPP					
	(1)	(2)	(3)	(4)	(5)	(6)
Panel A: Factories above the median on line-leader arrests						
High Organisational Capacity	0.035	-0.011	-0.065	-0.063	0.083	0.111
	[0.680]	[0.844]	[0.688]	[0.648]	[0.539]	[0.453]
Number of obs.	713	713	403	403	273	273
Mean Dep. Var. (low-capacity workers)	0.337	0.337	0.309	0.309	0.237	0.237
Nr. distinct factories	8	8	8	8	8	8
Panel B: Factories below the median on line-leader arrests						
High Organisational Capacity	0.115	0.097	0.053	0.030	0.088	0.100
	[0.422]	[0.308]	[0.526]	[0.732]	[0.520]	[0.256]
Number of obs.	798	798	513	513	360	360
Mean Dep. Var. (low-capacity workers)	0.328	0.328	0.294	0.294	0.306	0.306
Nr. distinct factories	9	9	9	9	9	9
Panel C: The difference, from the interacted model						
High Capacity × Split	-0.081	-0.104	-0.079	-0.068	-0.029	-0.040
	[0.596]	[0.384]	[0.684]	[0.672]	[0.814]	[0.674]
Number of obs.	1511	1511	916	916	633	633
Nr. distinct factories	17	17	17	17	17	17

Notes: Unit of observation is worker. The specifications include no factory fixed effects, since the treatment varies only across factories; the comparison is therefore between factories rather than within them. Wild cluster bootstrap-t p-values, clustered on factory, are reported in square brackets and are based on 500 replications with Rademacher weights and seed 329048. The outcome is the number of AAPP records matched to the worker's name, which may partly reflect how common the name is; see the text. *High organisational capacity* indicates a factory above the median of the inverse-covariance-weighted index of Anderson (2008), built from five components: the ratio of union to non-union workers, the rate of mobilisation around the minimum wage, meeting attendance, consultation of members, and leadership goal communication. Presidents are excluded and all remaining workers are pooled; the omitted category is workers in low-capacity factories, and the mean of the dependent variable is reported for that group. The sample is split by whether the factory is above the median on the share of its line leaders arrested, the median taken across factories. Line leaders are excluded from the sample here, since they define the split and would otherwise contribute to it mechanically. Panels A and B estimate the capacity effect separately in each group; Panel C reports the coefficient on the interaction of capacity with the split, estimated on the pooled sample, so the difference between the two panels is tested directly rather than as two independent estimates. Columns 1 through 5 add controls progressively, as recorded in the lower panel; column 6 repeats the column 4 controls on the column 5 sample, so that a change between columns 5 and 6 reflects the controls rather than the sample.

Notes: presidents drop from 17 to 9 (lose 8, ≈ half) once skills controls are added, driven by missing `SKPreviousEfficiencyZ` (a production-line metric presidents often lack). Dropped presidents are consistently shorter-tenure and less likely male.

Table B.10: Skills-control specification: presidents dropped vs. retained (col. 4 → 5).

	Dropped (n=8)	Retained (n=9)	Diff
Male	0.13	0.44	−0.32
Age	29.0	31.3	−2.3
Yrs education	9.5	8.3	+1.2
Raven score	6.25	7.00	−0.75
Migrant	0.38	0.44	−0.07
Months factory	40.1	55.6	−15.4
Months sector	61.9	93.3	−31.5

Table B.11: Post-Arrest Effect by President Quality (avg. weeks +1 to +4)

	High PQ	Low PQ	Difference	*p*-value
Panel A. President arrest				
All workers (pooled)	0.0088	0.0004	0.0083	0.35
Line Leaders	0.0416	0.0132	0.0284	0.35
Union Workers	0.0162	−0.0055	0.0217	0.15
Non-Union Workers	−0.0106	−0.0183	0.0077	0.68
Panel B. Line-leader arrest, same line				
All workers (pooled)	0.0218	0.0242	−0.0023	0.93
Union Workers	0.0241	0.0171	0.0070	0.79
Non-Union Workers	0.0180	0.0331	−0.0151	0.70

Notes: As Table 4, with the sample split at the median of president quality rather than of organisational capacity. President quality is the maximum, over a factory's presidents, of a nine-trait composite of the five Big Five dimensions with neuroticism reversed, the Raven score, grit, prosociality and locus of control, each standardised across workers; the median is taken across factories. In Panel A treatment is the first repression of the factory's president; in Panel B, the first repression of a line leader on the worker's own line, so line leaders are the treatment source there and do not appear as a row. High and Low are estimated on disjoint subsamples, so their difference is tested as two independent samples rather than by bootstrapping the difference itself.

C Facebook text analysis: methodology and additional results

C.1 Methodology

We classify a post as post-coup if its date is on or after February 1, 2021, and as pre-coup otherwise.

Keyness. We compare the vocabulary in the union federations' Facebook posts before and after the coup using unigram, bigram, and trigram keyness, following the relative-frequency approach in Ferrario and Stantcheva (2022). Text is converted to lowercase, English stopwords are removed, and only Latin-alphabet tokens—allowing hyphens and apostrophes—are retained. We do not stem words. Bigrams and trigrams are constructed from the resulting cleaned token sequence. Within each n-gram order, we retain terms occurring at least three times in the labor union's corpus.

For each term t, let a_t and c_t be its numbers of occurrences in the post- and pre-coup corpora, respectively, and let A and C denote the corresponding total numbers of n-gram tokens. We form a 2×2 table contrasting occurrences of t with occurrences of all other terms and calculate

$$K_t = \operatorname{sgn}\left(\frac{a_t}{A} - \frac{c_t}{C}\right) \chi^2_{Y,t},$$

where $\chi^2_{Y,t}$ is the Pearson chi-squared statistic with Yates's continuity correction. We implement this calculation using `quanteda.textstats::textstat_keyness()` (Benoit, Watanabe, Wang, Nulty, Obeng, Müller and Matsuo, 2018). Positive values indicate disproportionate post-coup usage, negative values indicate disproportionate pre-coup usage, and larger absolute values indicate stronger differentiation between the periods. Thus, keyness captures relative distinctiveness rather than raw frequency. The figures report, separately for each n-gram order, the 15 most positive and 15 most negative terms. Significance markers report unadjusted chi-squared p-values ($^{*}p < 0.10$, $^{**}p < 0.05$, and $^{***}p < 0.01$).

Embedding-based semantic axes. Following the geometric representation of text discussed by Gentzkow et al. (2019); Goto, Matsumoto, Tsuda and Yamasaki (2026), we locate each post along substantively defined semantic dimensions. We embed each post and anchor term using Google's `gemini-embedding-001` model (Lee, Chen, Dua et al., 2025), with the `SEMANTIC_SIMILARITY` task setting.[15] The model is not fine-tuned on either labor union. The embedding request truncates input text to 8,000 characters; the longest analyzed CTUM and STUM post is 6,338 and 3,884 characters, respectively, so this cap does not truncate any analyzed post.

We request 768-dimensional embeddings. The model supports output dimensions from 128 to 3,072; Google recommends 768, 1,536, or 3,072 dimensions, with 3,072 as the default. We selected 768 because it is the smallest recommended dimension and substantially reduces storage and downstream computation. The model uses Ma-

[15]The model and API configuration are documented at `https://ai.google.dev/gemini-api/docs/models/gemini-embedding-001` and `https://ai.google.dev/gemini-api/docs/embeddings` (accessed August 24, 2026).

tryoshka Representation Learning, under which leading subsets of the embedding coordinates are trained to retain useful semantic information. Accordingly, Google characterizes the recommended lower-dimensional representations as sacrificing little quality relative to the full vector. Any effect cannot be ruled out without re-estimating the analysis at higher dimensions, but it should be limited for the relative similarity and projection comparisons used here. We manually normalize the reduced-dimensional embeddings before scoring, as recommended for `gemini-embedding-001`.

Let v_i denote the embedding of post i and a_w the embedding of anchor term w. We first normalize both:

$$\widehat{v}_i = \frac{v_i}{\|v_i\|_2}, \qquad \widehat{a}_w = \frac{a_w}{\|a_w\|_2}.$$

For axis k, with negative- and positive-pole anchor sets A_k^- and A_k^+, we construct pole centroids

$$\overline{a}_k^{\pm} = \frac{1}{|A_k^{\pm}|} \sum_{w \in A_k^{\pm}} \widehat{a}_w$$

and orient the unit axis from the negative to the positive pole:

$$u_k = \frac{\overline{a}_k^+ - \overline{a}_k^-}{\|\overline{a}_k^+ - \overline{a}_k^-\|_2}.$$

The semantic-axis score is the projection

$$s_{ik} = \widehat{v}_i' u_k.$$

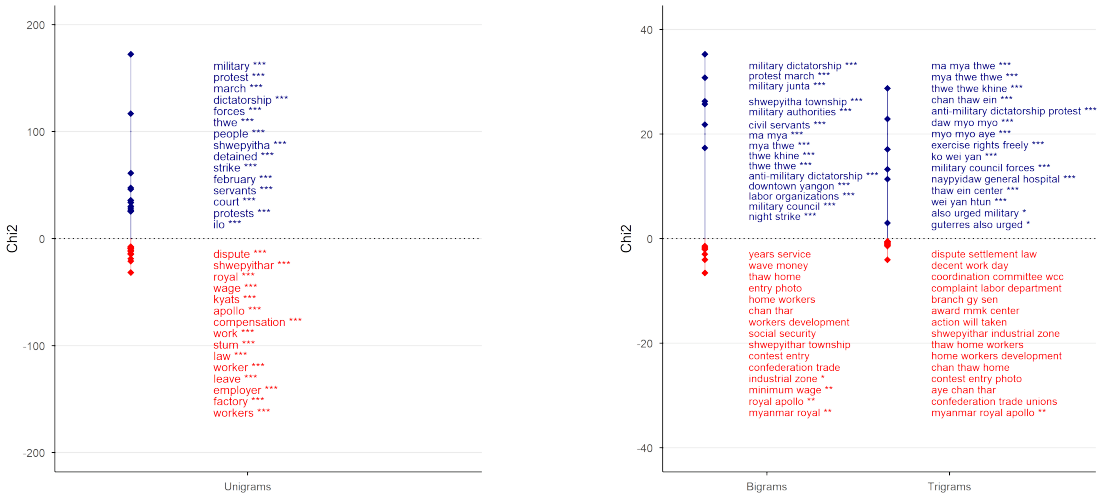
Higher scores indicate greater alignment with the positive pole. The scatterplots place each post on the two selected axes and mark the pre- and post-coup centroids, calculated as the period-specific mean coordinates. Anchor embeddings are held fixed and shared across CTUM and STUM, placing both labor unions in the same semantic coordinate system.

We also retain a complementary cosine-similarity measure. For each pole, its anchors are concatenated into a single pseudo-document and embedded; we then calculate each post's cosine similarity to the positive and negative pseudo-documents. The monthly raw-score figures plot the monthly mean cosine similarity to each pole as separate lines, whereas the monthly axis-score figures and the post-level scatterplots use the centroid-projection scores defined above. For example, a post's cosine similarity with the labor axis pole only, as opposed to its similarity *relative* to the opposing political pole. These quantities are diagnostics rather than the projection scores reported in the semantic-axis scatterplots.

These pre/post comparisons are descriptive: they characterize changes in the observed posts but do not by themselves identify a causal effect of the coup. Translation

may also alter some lexical or semantic distinctions.

C.2 STUM results



Unigrams Bi/trigrams

Figure C.1: STUM Facebook posts: keyness, bi/trigrams, pre- vs. post-coup.

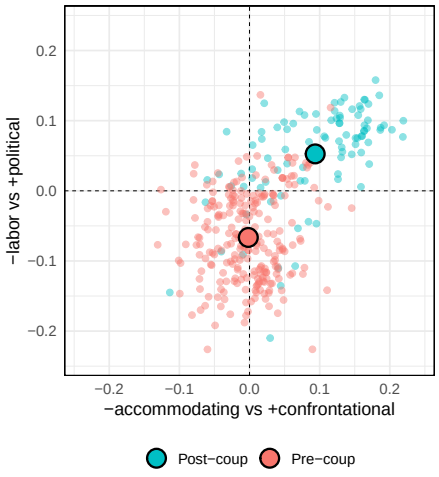
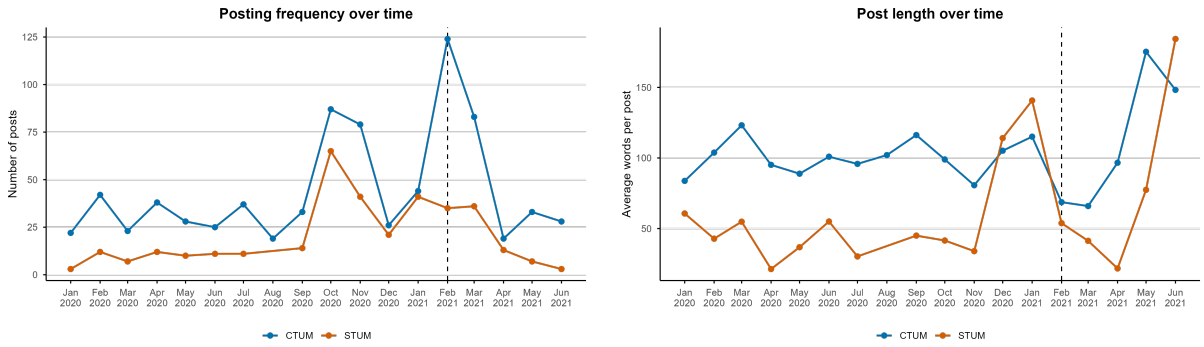


Figure C.2: STUM semantic-axis scatter (Content × Strategy)

C.3 Extensive and intensive margins



(a) Number of posts per month

(b) Average translated words per post

Figure C.3: Monthly Facebook posting activity for CTUM and STUM. Panel (a) shows the number of posts published in each month. Panel (b) shows the average number of translated words per post in each month. Each panel reports separate series for CTUM and STUM.

D Theory Appendix

This appendix presents in full the model summarized in Section 7. This document presents a simple model of a leader's quality, a union's organisational capacity, and workers' engagement in protest. Organisational capacity is an investment made by the leader, either to boost cohesion/coordination or her credibility. It derives predictions linking organisational capacity and workers' protest participation, and how that depends on the leader's own participation, as well as the worker and the leader's characteristics.

D.1 Set-up, timing, and assumptions

There is one leader, indexed by L, and N identical followers (or workers), indexed by $i \in \{1, \ldots, N\}$. The leader and the workers contemplate whether to participate in a protest.

The leader cares both about her own participation and about average worker participation. Her payoff is

$$U_L(a_L \mid \theta) = a_L(\theta - c) + \rho E\left[\frac{1}{N}\sum_{i=1}^{N} a_i \,\middle|\, a_L\right], \tag{D.1}$$

where $\theta \in \{0, 1\}$ represents the common political value of protest, c is the cost of protesting, $a_L \in \{0, 1\}$ is the leader's participation decision, and $\rho \geq 0$ measures how much the leader values follower mobilization.[16] Let $\Pr(\theta = 1) = \sigma$.

[16] Normalizing by N ensures that the strength of this motive does not mechanically increase with the number of followers.

Workers also care both about their own participation and about the participation of other workers.[17] The payoff for worker i is given by

$$U_i(a_i) = a_i(\alpha\theta + \varepsilon - c) - \lambda\gamma\bar{s}(1 - a_i)m_{-i}^{\beta}, \tag{D.2}$$

where $\alpha \in [0,1]$ is the worker's intrinsic valuation for protest, $\lambda \in [0,1]$ the strength of workers' attachment to the organization, $\gamma \geq 0$ the strength of the organization's coordination technology, $\varepsilon \sim H(\cdot)$ a common shock distributed with continuously differentiable cdf H and density f, and

$$m_{-i} = \frac{1}{N-1}\sum_{j \neq i} a_j$$

is the fraction of other workers who participate. The parameter $\bar{s} > 0$ parametrizes the cost of staying home when other workers participate, while $\beta > 0$ governs how this cost varies with the fraction of other workers participating. The benchmark $\beta = 1$ corresponds to a linear coordination cost; $\beta < 1$ ($\beta > 1$) implies a concave (convex) coordination cost.[18]

We assume that the leader observes θ perfectly. Followers do not observe θ. Instead, they form beliefs about θ from the leader's action. Followers believe that the leader observes the correct state with precision $h \in \left[\frac{1}{2}, 1\right]$. Thus, even though the leader actually observes θ perfectly, followers perceive her information to be imperfect. The parameter h captures their confidence in the leader's judgement.[19]

Workers also do not observe ε directly. Instead, follower i receives a private signal

$$x_i = \varepsilon + \tau\eta_i,$$

where the η_i are iid continuous noise terms. We solve the global game for $\tau > 0$ and consider the limit as $\tau \to 0$.[20]

Timing

The game has three stages.

[17] For simplicity, workers do not care directly about the leader's participation.

[18] Hence the coordination motive is asymmetric: workers dislike "shrinking" when others participate, but do not suffer a coordination cost $\underline{s}$ from participating alone. It is straightforward to relax $\underline{s} = 0$.

[19] The more standard formulation would have the leader observe the state θ with precision h and, therefore, followers have correct beliefs. It is straightforward to solve that case. This formulation perhaps better captures the fact that protests against the military coup had not been anticipated, and thus workers' assessment of the leader's action depends on their perception of her credibility, rather than her actual information set.

[20] The common shock ε makes ex-ante participation probabilities smooth, while arbitrarily small private uncertainty selects a unique equilibrium of the coordination game.

T=0 The leader invests in organizational capital K.

T=1 The political state θ is realized and observed by the leader. The leader chooses $a_L \in \{0, 1\}$.

T=2 The common payoff shock ε is realized. Followers receive private signals x_i and, after observing a_L, simultaneously choose $a_i \in \{0, 1\}$.

As usual, the game is solved backwards. We focus on parameters that generate a separating equilibrium, in which the leader participates when $\theta = 1$ but doesn't when $\theta = 0$.[21] The global game machinery at $T = 2$ induces a unique continuation equilibrium, despite the coordination nature of the game played by workers.[22] We initially consider generic parameters (h, γ). Then, when solving at $T = 0$, we give organizational capital K a specific role, considering separately:

$$\textit{Coordination Model:} \qquad \gamma = \gamma(K), \quad h = \bar{h},$$

and

$$\textit{Credibility Model:} \qquad h = h(K), \quad \gamma = \bar{\gamma}.$$

D.2 Follower and leader participation

D.2.1 Followers' beliefs about the political state

Suppose the leader follows her information. Given perceived precision h, after observing $a_L = 1$ followers assign probability

$$\mu_1(h) \equiv \Pr(\theta = 1 \mid a_L = 1) = \frac{\sigma h}{\sigma h + (1 - \sigma)(1 - h)}. \tag{D.3}$$

Following $a_L = 0$,

$$\mu_0(h) \equiv \Pr(\theta = 1 \mid a_L = 0) = \frac{\sigma(1 - h)}{\sigma(1 - h) + (1 - \sigma)h}. \tag{D.4}$$

For $h > 1/2$, $\mu_1(h) > \sigma > \mu_0(h)$, and $\mu_1'(h) > 0$, $\mu_0'(h) < 0$.

[21] Because the leader values the workers' participation, there is an incentive to pool, i.e., to participate even when the state is bad to induce workers into participation. We shut this down.

[22] An alternative formulation allows for multiple equilibria and parametrises the leader's beliefs over which equilibrium is selected.

D.2.2 The followers' global game

Conditional on leader action $a_L = a$, follower i's expected standalone return from participation is

$$\alpha\mu_a(h) + E[\varepsilon \mid x_i] - c.$$

If worker i does not participate, she incurs the coordination loss

$$-\lambda\gamma\bar{s}m_{-i}^{\beta}.$$

Thus worker i participates whenever

$$\alpha\mu_a(h) + E[\varepsilon \mid x_i] - c + \lambda\gamma\bar{s}E[m_{-i}^{\beta} \mid x_i, a_L = a] \geq 0.$$

The game has strategic complementarities. With arbitrarily precise private signals, the standard global-games argument selects a unique symmetric cutoff equilibrium. At the marginal signal, in the symmetric vanishing-noise limit, the number of other workers whose signals lie above the marginal worker's signal is uniformly distributed over $\{0, \ldots, N-1\}$. Hence

$$\Pr(n_{-i} = k \mid x_i = x^*, a_L = a) \longrightarrow \frac{1}{N}, \qquad k = 0, \ldots, N-1.$$

Since $m_{-i} = \frac{n_{-i}}{N-1}$, it follows that

$$E[m_{-i}^{\beta} \mid x_i = x^*, a_L = a] \longrightarrow \Psi_N(\beta) \equiv \frac{1}{N}\sum_{k=0}^{N-1}\left(\frac{k}{N-1}\right)^{\beta}. \tag{D.5}$$

As a benchmark, the linear case $\beta = 1$ gives $\Psi_N(1) = \frac{1}{N(N-1)}\sum_{k=0}^{N-1} k = \frac{1}{2}$, while $N \to \infty$ gives $\Psi_N(\beta) \longrightarrow \int_0^1 m^{\beta}\, dm = \frac{1}{1+\beta}$. More generally, $\Psi_N(\beta) > 1/2$ for $\beta < 1$ and $\Psi_N(\beta) < 1/2$ for $\beta > 1$.

The marginal common fundamental therefore satisfies

$$\alpha\mu_a(h) + \varepsilon_a^* - c + \lambda\gamma\bar{s}\Psi_N(\beta) = 0.$$

Hence the unique global-games cutoff is

$$\varepsilon_a^* = c - \alpha\mu_a(h) - \lambda\gamma\bar{s}\Psi_N(\beta). \tag{D.6}$$

As $\tau \to 0$, all workers participate whenever $\varepsilon > \varepsilon_a^*$ and none participate whenever $\varepsilon < \varepsilon_a^*$.

Let

$$M(a;h,\gamma) \equiv E\left[\frac{1}{N}\sum_{i=1}^{N} a_i \,\middle|\, a_L = a\right]$$

denote expected average follower participation. Then

$$M(a;h,\gamma) = 1 - H\left(c - \alpha\mu_a(h) - \lambda\gamma\bar{s}\Psi_N(\beta)\right). \tag{D.7}$$

Thus, in the vanishing-noise limit, $M(a;h,\gamma)$ is also the probability that the organization coordinates on participation following leader action a.

D.2.3 The leader's participation decision

Using (D.1), the leader participates iff

$$\theta - c + \rho\left[M(1;h,\gamma) - M(0;h,\gamma)\right] \geq 0. \tag{D.8}$$

Since $\mu_1(h) \geq \mu_0(h)$,

$$M(1;h,\gamma) \geq M(0;h,\gamma).$$

Moreover, because $M(a;h,\gamma) \in [0,1]$,

$$0 \leq M(1;h,\gamma) - M(0;h,\gamma) \leq 1.$$

We impose

$$\rho < c < 1. \tag{D.9}$$

This is a sufficient condition for a separating leader strategy.

When $\theta = 0$,

$$-c + \rho[M(1) - M(0)] \leq -c + \rho < 0,$$

so the leader does not participate.

When $\theta = 1$,

$$1 - c + \rho[M(1) - M(0)] > 0,$$

so the leader participates.

Hence

$$a_L = \theta. \tag{D.10}$$

The separating assumption is useful because it keeps the leader's behavior deliberately simple. Conditional on the realized political state, organizational capital does not affect whether the leader participates. Instead, organizational capital affects how strongly followers respond to the leader's action.

D.3 Investment in organizational capital

At Stage 0 the leader chooses K before knowing whether $\theta = 1$ or $\theta = 0$.

Let the cost of organizational investment be

$$C(K; q),$$

where q denotes leader quality. We assume

$$C_K > 0, \qquad C_{KK} > 0, \qquad C_{Kq} < 0.$$

Thus high-quality leaders can build organizational capital at lower marginal cost.

Under separation, the leader's expected payoff is

$$W(K) = \sigma\left[1 - c + \rho M_1(K)\right] + (1-\sigma)\rho M_0(K) - C(K; q), \tag{D.11}$$

where $M_a(K)$ depends on how organizational capital enters the mobilization technology.

We now consider two alternative interpretations of organizational capital.

D.3.1 Organizational capital as coordination

Suppose organizational capital strengthens coordination:

$$\gamma = \gamma(K), \qquad \gamma'(K) > 0,$$

while perceived leader precision is fixed at

$$h = \bar{h}.$$

Define

$$t_a^C(K) = c - \alpha\mu_a(\bar{h}) - \frac{\lambda\gamma(K)\bar{s}}{2}.$$

Expected average participation is

$$M_a^C(K) = 1 - H(t_a^C(K)). \tag{D.12}$$

Differentiating,

$$\frac{\partial M_a^C}{\partial K} = \frac{\lambda\bar{s}}{2}\gamma'(K) f(t_a^C(K)) > 0, \qquad a \in \{0, 1\}. \tag{D.13}$$

Thus organizational capital raises mobilization irrespective of whether the leader

participates. Its effect does not operate through information about the state; it operates by making coordinated participation easier to sustain.

Moreover, λ and organizational capital are technological complements. In the latent participation index,

$$\frac{\partial^2}{\partial K\,\partial \lambda}\left[\alpha\mu_a(\bar{h}) - c + \frac{\lambda\gamma(K)\bar{s}}{2}\right] = \frac{\gamma'(K)\bar{s}}{2} > 0.$$

By contrast, there is no direct structural interaction between α and K:

$$\frac{\partial^2}{\partial K\,\partial \alpha}\left[\alpha\mu_a(\bar{h}) - c + \frac{\lambda\gamma(K)\bar{s}}{2}\right] = 0.$$

The Stage-0 first-order condition for an interior optimum is

$$C_K(K;q) = \frac{\rho\lambda\bar{s}}{2}\gamma'(K)\left[\sigma f(t_1^C(K)) + (1-\sigma)f(t_0^C(K))\right]. \tag{D.14}$$

Hence organizational capital is valuable because it raises follower participation in both states of the world.

Higher λ directly raises the return to investment in coordination capacity. Higher leader quality q also raises optimal investment by lowering its marginal cost.

The effects of α and σ on K^* are less general. They shift the location of the participation thresholds and therefore the density $f(\cdot)$ at the relevant margins. Without additional restrictions on H, neither comparative static has an unambiguous sign.

D.3.2 Organizational capital as credibility

Suppose instead that organizational capital increases followers' confidence in the leader's information:

$$h = h(K), \qquad h'(K) > 0,$$

while coordination strength is fixed at

$$\gamma = \bar{\gamma}.$$

Define

$$t_a^I(K) = c - \alpha\mu_a(h(K)) - \frac{\lambda\bar{\gamma}\bar{s}}{2}.$$

Expected average participation is

$$M_a^I(K) = 1 - H(t_a^I(K)). \tag{D.15}$$

Following leader participation,

$$\frac{\partial M_1^I}{\partial K} = \alpha f(t_1^I(K))\mu_1'(h(K))h'(K) > 0. \tag{D.16}$$

Following leader non-participation,

$$\frac{\partial M_0^I}{\partial K} = \alpha f(t_0^I(K))\mu_0'(h(K))h'(K) < 0. \tag{D.17}$$

Thus credibility has a fundamentally different effect from coordination. Higher organizational capital makes followers more responsive to the leader's state-contingent action:

$$a_L = 1 \quad \Rightarrow \quad K \uparrow \Rightarrow M \uparrow,$$

while

$$a_L = 0 \quad \Rightarrow \quad K \uparrow \Rightarrow M \downarrow.$$

There is no direct technological complementarity between K and worker attachment λ. By contrast, intrinsic political motivation α scales the informational value of the leader's action:

$$\frac{\partial^2}{\partial K \, \partial \alpha} \left[\alpha \mu_1(h(K))\right] > 0,$$

whereas

$$\frac{\partial^2}{\partial K \, \partial \alpha} \left[\alpha \mu_0(h(K))\right] < 0.$$

The Stage-0 first-order condition is

$$C_K(K;q) = \rho \alpha h'(K) \left[\sigma f(t_1^I(K))\mu_1'(h(K)) + (1-\sigma) f(t_0^I(K))\mu_0'(h(K))\right]. \tag{D.18}$$

Since $\mu_1' > 0$ but $\mu_0' < 0$, investment in credibility has both a benefit and a cost from the leader's perspective. It increases follower mobilization when the leader participates, but decreases mobilization when she does not.

Using the expressions above,

$$\mu_1'(h) = \frac{\sigma(1-\sigma)}{D_1^2}, \qquad \mu_0'(h) = -\frac{\sigma(1-\sigma)}{D_0^2},$$

so the marginal benefit of credibility can be written as

$$\rho \alpha h'(K) \sigma(1-\sigma) \left[\frac{\sigma f(t_1^I(K))}{D_1^2} - \frac{(1-\sigma) f(t_0^I(K))}{D_0^2}\right].$$

A positive investment in credibility therefore requires the expected mobilization

gain in the good state to outweigh the reduction in mobilization in the bad state.

This trade-off is absent from the coordination model.

D.3.3 Comparative predictions

The two interpretations of organizational capital generate distinct comparative statics.

Table D.1: Comparative Statics: Coordination versus Credibility

	Coordination	**Credibility**
$K \uparrow$ following $a_L = 1$	Participation rises	Participation rises
$K \uparrow$ following $a_L = 0$	Participation rises	Participation falls
Interaction $K \times \lambda$	Positive direct complementarity	No direct complementarity
Interaction $K \times \alpha$ following $a_L = 1$	No direct structural interaction	Positive
Interaction $K \times \alpha$ following $a_L = 0$	No direct structural interaction	Negative
Optimal investment K^* and λ	Higher λ directly raises the return to K; K^* is therefore typically increasing in λ	No direct K–λ complementarity; effect on K^* operates only through the location of the participation margin
Optimal investment K^* and α	No unambiguous effect without restrictions on H	α scales the informational return to precision; the net effect depends on the relative weight of the good- and bad-state margins
Optimal investment K^* and σ	Generally ambiguous: σ changes both state weights and posterior participation margins	Higher σ places greater weight on the state in which credibility raises mobilization, making investment in precision more attractive under natural regularity conditions
Leader participation conditional on θ	Unaffected by K	Unaffected by K