



Global Intelligence Summary

REPORTING PERIOD: 24 NOV – 01 DEC 2023



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Week 50: 24 November – 01 December 2023

Executive Summary

- In **Panama**, the Supreme Court has ruled against a mining company's new excavation site which will **almost certainly** decrease the frequency and size of demonstrations that have been paralysing much of the country.
- **Brazilian** intelligence warns of a potential **Venezuelan** invasion of **Guyana**, a move that will **likely** complicate United States policy, destabilise oil prices and push Caracas into the sphere of hostile states.
- A ceasefire between **Israel** and Hamas has enabled the exchange of prisoners but fighting has resumed and will **likely** last for months until Israel achieves most of its objectives, **almost certainly** leading to dire humanitarian conditions in the **Palestinian territory**.
- In **Niger**, the revocation of a people smuggling law will **likely** result in increased migrants seeking to use the country as a transit route to Europe, which will **likely** provoke political tension on the continent.

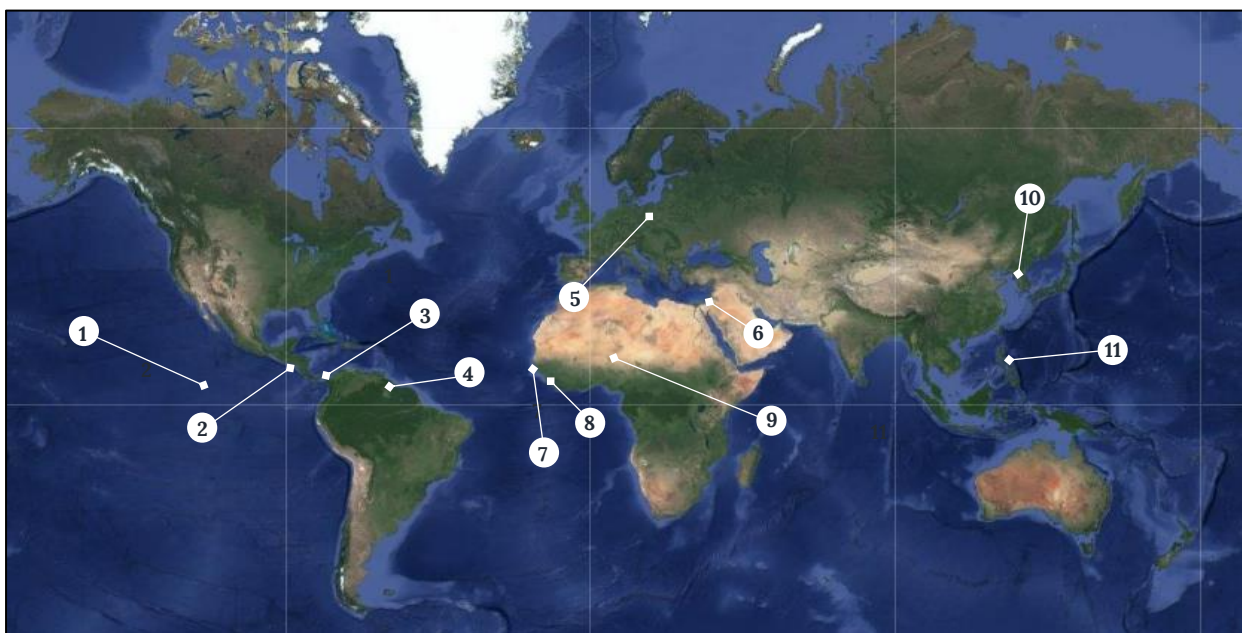


Figure 1: Significant activity identified during the current reporting period.

AMER

- 1 Mexico:** Activists board mining vessel and disrupt operations
- 2 El Salvador:** President seeks second term despite constitution
- 3 Panama:** Supreme Court rule against mine amid huge protests
- 4 Guyana:** Brazil warns of Venezuelan invasion of Guyana inbound

EMEA

- 5 Poland:** Contentious government sworn in but unlikely to last
- 6 Gaza Strip:** Ceasefires allow for prisoner exchanges but fighting resumes
- 7 Guinea-Bissau:** Security forces clash internally as finance minister detained
- 8 Sierra Leone:** Attempted Coup thwarted by government
- 9 Niger:** Migration law rescinded

APAC

- 10 North Korea:** Images from new spy satellite sends message to the US
- 11 Philippines:** Government and communist rebels resume peace talks



Americas (AMER)

Mexico:

Greenpeace disrupt rare metal mining after boarding vessel.

On 25 November, Greenpeace activists boarded a deep-sea mining vessel named Coco, in the Pacific Ocean between Hawaii and Mexico in an area known as the Clarion Clipperton Zone (CCZ). The protestors initially blocked the vessel and disrupted its operations by positioning kayaks around it. They then escalated the situation by boarding the vessel, forcing it to cease all operations. Greenpeace have stated that their actions were undertaken to prevent the harming of marine life in the area. The Metals Company (TMC), a Canada-based firm which operates the ship, has accused Greenpeace of endangering the crew and violating international law.

Assessment: The success of Greenpeace's demonstration is almost certainly going to inspire other activist groups to emulate such activity and improve their maritime capabilities. Currently, only a few activist groups maintain the capability to conduct demonstrations at sea, especially as far out to sea as areas like the CCZ, which is approximately 600 nautical miles away from the Mexican coast. Climate advocacy groups are likely to continue to gain momentum, especially from younger generations and the developing world. This is likely to result in a surge of revenue, enabling them to invest in and develop new capabilities that will enable them to access remote locations at sea and disrupt more mining, drilling, or exploration activity. However, as the world transitions away from traditional oil-based energy sources towards electric alternatives, there is a growing necessity for increased rare metal mining, much of which is under the seabed with states and companies already racing to access underwater resources. This also presents climate activists with a tension in their advocacy as they work to reduce reliance on traditional oil-based energy sources while simultaneously opposing mining activities that support the production of essential components for greener electric alternatives.

El Salvador:

President Bukele seeks controversial second term despite constitutional term limits.

Early in the reporting period, President Nayib Bukele formally requested a leave of absence from Congress in order to campaign ahead of the February 2024 election, where he and Vice President Felix Ulloa are seeking a second consecutive term. On 29 November, Congress, which is dominated by Bukele's Nuevas Ideas (NI) party, approved his leave and he officially stood down on 1 December. Congress also voted for his replacement, the current head of the National Directorate of Municipal Works, Claudia Rodriguez, a close ally of Bukele.

Assessment: Constitutionally, presidents in El Salvador are not allowed to serve consecutive terms in office, highly likely an attempt to prevent the emergence of dictatorial regimes. However, back in 2021 the country's top court, which had been stacked with Bukele supporters, ruled he could run if he took a six month leave of absence. With the winner of February's election being inaugurated in June, Bukele is abiding by this ruling. It is also almost certain that Bukele will continue to hold considerable influence on the presidential office as Rodriguez is a close ally, having worked for him in both his business empire, as well as his political offices as a local lawmaker and mayor of the capital. Despite the seemingly authoritarian move, Bukele's decision has been widely embraced by voters and it is highly likely that he emerges victorious in February, with a recent poll suggesting he had a 90 percent approval rating. The public credit the president with significantly reducing crime and violence in the country, with over 75,000 suspected gang members arrested in his first term to date. Therefore, while there may be some small, short-term protests over the news, large scale civil unrest is highly unlikely. Critics however have voiced concern that the nation's democratic backsliding is continuing. NI's dominance makes it a realistic possibility that El Salvador becomes a one-party state in the coming years, with dominance over

the presidential office, Congress, and the legislature. This would only strengthen Bukele's position, and likely bring accusations of authoritarianism, accusations that will only be justified if the military continues their heavy-handed tactics, drawing allegations of human rights violations, especially after storming Congress to pass Bukele's bills in the past. Therefore, while in the short-term the risk profile of El Salvador is highly likely unaffected, a more and more authoritarian Bukele and NI does present potential issues for the future.

Panama:

Government rule to shut down controversial mine amid environmental protests.

On 28 November, the Panamanian Supreme Court ruled that the governments mining contract with the Canadian company, First Quantum, was unconstitutional, forcing the mining company to cease its operation at the Cobre Panama mine. The announcement prompted celebratory street gatherings and was largely welcomed by Panamanians, who expressed concerns over the mine regarding environmental issues and made allegations that the mine was only benefitting foreign corporations. The announcement of the mine's impending closure also led to a cessation of protests which have been ongoing for weeks.

Assessment: Panama has been paralysed by protests for weeks, with roadblocks leading to shortages in gas and propane throughout the country, many supermarket shelves have run bare, and hotels and restaurants have sat empty. Whilst the ruling will reduce the largely environmental protests, it is likely that counter protests will be prompted by the decision. The Union of Panamanian Mining Workers (Utramipa) has already stated that they are going to stage demonstrations, however, it is highly unlikely that these protests will gain as much momentum. Whilst the short-term ramifications of the ruling are likely to benefit Panama, the long-term forecast may be harmful. It is almost certain that First Quantum will start arbitration against Panama which could cost the country hundreds of millions of dollars, and the mines closure will be a costly and long process which could take five to ten years. Furthermore, the decision is likely to deter future foreign investment and will almost certainly affect the country's long-term credit rating. Despite Panama being a principally service-based economy, the mine also contributed an estimated five per cent to Panama's GDP and will be a major hit to the country's economy, especially as the Panama Canal is currently operating at a reduced capacity caused by drought.

Brazil, Venezuela and Guyana:

Brazil augments border defences in preparation for Venezuelan invasion of Guyana.

Reports from Brazilian intelligence suggest that Venezuela is preparing for an imminent invasion of Guyana in order to seize the disputed territory of Essequibo in western Guyana. In response, the Brazilian Armed Forces have intensified their defensive actions along its northern border with Venezuela. Venezuelans have already participated in a simulated referendum over the disputed territory and are preparing to participate in a real referendum on 3 December. Venezuela has announced that 120,000 police and over 350,000 soldiers will be deployed for security during the referendum.

Assessment: The Venezuelan claim to Essequibo, which accounts for over two-thirds of Guyana's land mass, dates back to the colonial era with Caracas citing the imprecise language used in the 1899 Arbitral Award, which was intended to settle the boundary between British Guiana and Venezuela, as grounds for contention. However, Venezuela claims have intensified under the Maduro government which has been largely driven by the fact Essequibo is known to be rich in hydrocarbons on both land and in its exclusive economic zone (EEZ). To counter the Venezuelan threat, Guyana has attempted to enlist United States support and has mooted the idea of establishing military bases with foreign support in Essequibo. Guyana has also participated in military drills with the United States and other regional actors. There is a realistic possibility that Venezuela is planning to invade Guyana before its defence ties with the United States become too developed. There is also a probable chance that the mass deployment of Venezuelan

police and armed forces for the referendum is cover or shaping activity for an invasion preparation. A Venezuelan invasion of Guyana would undoubtedly challenge American interests in the region and would ordinarily prompt a kinetic response. However, with wars in Ukraine and the Middle East, there is a realistic possibility that the United States is already overstretched and a commitment to Guyana would reduce its capacity to deliver aid and support to either Israel or Ukraine. In addition, it is likely that the United States is dependent on Venezuelan oil to prevent international oil prices from experiencing significant volatility and to maintain a stable and diversified energy supply, as evidenced by Washington's recent easing of Venezuelan sanctions. Moreover, any kinetic response to a Venezuelan invasion to Guyana will likely push Caracas further into the sphere of influence of Russia, China and Iran.

AMER Forecast. Sao Paulo's public transportation system has come to a standstill as workers initiated an indefinite strike, paralysing the metropolis of over 20 million people after just one day of action. The strike is in response to proposals to privatise the system, part of Governor Tarcísio de Freitas's manifesto, who took office in January 2023. Workers assert that the strike will persist until their demands are met, making disruption in the coming reporting period highly likely, and there is a realistic possibility other sectors will follow.

In Burlington, Vermont, a suspect has been apprehended in the shooting of three college students of Palestinian descent. The incident is being investigated as a potential hate-motivated crime and the event reflects the persistent polarisation in society in response to the Israel-Hamas War. As the ceasefire ends and fighting resumes, high tensions are almost certain to persist and there is a heightened risk of similar attacks on both Muslim and Jewish communities throughout the Americas. Haiti's brutal gang wars have expanded beyond the capital to vital agricultural regions, displacing tens of thousands and severely disrupting access to essential food supplies. The dire situation is almost certain to persist until the deployment of an international task force, however the date of its arrival keeps being delayed by legal complications. In Colombia, National Liberation Army (ELN) guerillas have engaged with Clan del Golfo militants over a territorial dispute, prompting the Colombian Defence Minister to call for a ceasefire and warned that current peace talks in Mexico City could collapse, potentially leading to a significant increase in violence within the South American nation.

In the O'Higgins region of Chilean Patagonia, fire rescue teams are struggling to contain wildfires which have led to several red alerts and evacuation orders. The 2023-24 wildfire season is anticipated to be worse than average due to the effects of the El Nino phenomenon, and it is likely that similar events could be witnessed in neighbouring Argentina.



Europe, Middle East & Africa (EMEA)

Poland:

Law and Justice government sworn in but unlikely to last as opposition criticise decision.

On 27 November, President Andrzej Duda swore Law and Justice (PiS) candidate Mateusz Morawiecki in as prime minister. Morawiecki and PiS won the most parliamentary seats in the October 2023 election but fell short of the 231 seats needed to form a majority. The opposition alliance called the decision a “farce” as they secured 248 seats and have agreed a coalition to govern. The following day, the opposition coalition led a debate in parliament on the formation of three commissions to investigate allegations of wrongdoing during the PiS party's eight years in government.

Assessment: With Duda also affiliated with the PiS, it is almost certain that asking Morawiecki to form a government is a last-ditch attempt to secure another PiS term in government. Critics will highly likely argue that this is another attempt by PiS to undermine democracy. Morawiecki and his government will face a vote of no confidence in two weeks, giving him time to continue to try and win over coalition partners. It is highly unlikely he will be able to gather enough support however, as opposition lawmakers accuse PiS of presiding over democratic backsliding that blocked European Union funds, an erosion of women's rights, the demonisation of minority groups and rampant nepotism in state companies. It is therefore almost certain that he will lose the vote. This will likely see the second largest party, Civic Coalition (KO), and their leader, Donald Tusk, invited to form a government. KO and Tusk have already agreed a coalition partnership with the Third Way (TD) and The Left, and therefore it is highly likely that Tusk, with the support of these parties, will be prime minister by Christmas. There is a realistic possibility that protests both in favour and opposing this eventuality occur in the coming weeks. Regardless of who governs, it is highly likely that parliament will pass the creation of the commissions investigating PiS due to the majority of lawmakers supporting this. If PiS do fail their vote of no confidence in two weeks, it is likely that these investigations begin in haste and there is a realistic possibility of legal consequences against the party.

Israel and the Gaza Strip:

Fighting resumes after ceasefire enables the exchange of prisoners.

Throughout the reporting period, a truce between the Israel Defence Forces (IDF) and Hamas largely held for several days allowing for the mutual exchange of hostages and prisoners. Hamas hostages were exchanged in multiple waves, resulting in the release of over 100 Hamas-held hostages, with Israel typically releasing three Palestinian prisoners for every hostage released from Gaza. However, on 1 December the ceasefire ended, resulting in multiple IDF air strikes on positions throughout Gaza after Israel accused Hamas of violating the truce deal. Reports from within the IDF indicate that Israel is planning on conducting a campaign against Hamas that will last for a year or more and that not even half of its objectives have been met. Israel's reaction to the Hamas attacks has drawn international condemnation and during the reporting period, Turkish President Erdogan has called for the Israeli government to be tried for war crimes and the Spanish Prime Minister Sanchez has claimed Israel is in violation of international law.

Assessment: It is almost certain that the ceasefire achieved during the reporting period was only ever a temporary reprieve to facilitate the exchange of hostages. Whilst Hamas still holds many hostages, it has likely lost some of its leverage over Israel. It is likely that the IDF plan on starting the second stage of its ground offensive and it will likely commit to ground operations into southern Gaza once the northern areas have been secured. However, only an estimated 40

percent of Gaza City has been secured and it is unlikely the IDF will fully commit to the south until this objective is met. However, the IDF has already conducted shaping activity such as air strikes on southern Gaza in preparation for a ground offensive and has warned Palestinians to evacuate Khan Younis. With much of the exclave now under direct military threat, it is likely that the humanitarian crisis will deteriorate despite the facilitation of aid during the ceasefire. There are major concerns that more Palestinians will now succumb to disease than to military activity, with almost two million Gazans now sheltering in the south and winter looming.

Despite international pressure and condemnation, it is likely that the IDF will not stop until they have achieved most of their objectives. These likely include the killing or capturing of Hamas' senior leadership and the destruction of Hamas as a credible military force, which will likely take months to achieve. Whilst Hezbollah has refrained from escalating in the north of Israel, the destruction of an allied military force in the south of Israel will be a strategic loss for Hezbollah and its sponsor Iran in their shared future objective to destroy the state of Israel. If Hamas is too severely degraded as a military force, this could be a red line for Hezbollah and could provoke direct military action.

Guinea-Bissau:

Suspected coup attempt sees security forces clash after finance minister detained.

During the last reporting period, Finance Minister Suleimane Seidi was detained for suspected misuse of public funds after over CFA six million (USD 10,000) were allegedly disbursed to private entities. Then in the early hours of 1 December, members of the National Guard stormed the police station in which Seidi was being held, sparking clashes in the capital, Bissau. Gunfire was heard across the city, most notably near the presidential palace and in the neighbourhood of Antula. Military forces patrolled the city as dawn broke, and calm had reportedly been restored by 12:00 GMT. Seidi was returned to judicial prison and the Colonel leading the revolt, Victor Tchongo, had been arrested.

Assessment: Seidi is a member of the African Party for the Independence of Guinea and Cape Verde (PAIGC), a party that leads a coalition that won the parliamentary elections in June 2023. This was a shock to President Umaro Embalo, a member of Movement for Democratic Alternation, Group of 15 (Madem-G15), who had planned to push through a constitutional change that would have allowed him to consolidate power by removing the country's semi-presidential system. It is likely that the investigation of Seidi is politically motivated due to Embalo trying to consolidate his power. It is also highly likely that the country is divided politically, and there are differing allegiances within the security forces, and it is realistically possible that the National Guard were attempting to carry out a coup in favour of PAIGC. With Embalo currently out of the country at COP28, this strengthens the argument that this was a possible coup. There have been eight coups in West and Central Africa in the last three years, and Guinea-Bissau has witnessed at least ten coups since its independence in 1974. The country is still plagued by political volatility and despite the fact the latest attempt has almost certainly failed, Embalo's return will highly likely see a crackdown on opposition, the media, and the military, on grounds of national security.

Sierra Leone:

Attempted coup thwarted by Sierra Leonean Government.

In the early hours of 26 November, armed gunmen launched an attack in the Sierra Leonean capital, Freetown. The attack targeted a military barracks in Freetown's Wilberforce area, before moving on to target detention centres across the city. In response, the government imposed a nationwide curfew and tasked security forces to combat the unrest, who effectively had contained hostilities by 27 November. The unrest was later confirmed by the government to be an attempted coup, with 13 military officials detained on grounds of conspiracy by 28 November.

Assessment: The attempted coup was likely caused by the state's current economic situation. Sierra Leone's economy is highly dependent on imports, making it vulnerable to shocks in global markets. Inflation has increased gradually over the last year from 32 percent in October 2022 to 54 percent in September 2023. With an inability to curtail such an increase, civil discontent will surely rise and hostilities against the government will unlikely cease following the failed coup. For the African nation, employment through the government provides many with social stability during a period of significant unemployment. In turn, any further decline in Sierra Leone's economy is likely to see active growing support against the controversially appointed President Julius Madda Bio. Bio's re-election in June 2023 was marked with allegations of inconsistencies in results and generally viewed as lacking transparency. The subsequent four-month boycott of parliament by the opposing All People's Congress (APC) party in response to this has only worsened Bio's support across the country's populace. With political stagnation and economic indicators reaching levels last seen during the Sierra Leonean Civil War (1991-2002), it is likely that future armed hostility directed towards the government will occur. Such a threat will likely raise tensions and stoke fears in the eponymously named 'Coup Belt' of Western and Central Africa, a region that has seen eight military coup d'états since 2020.

Niger:

Niger revokes law aimed at curtailing the smuggling of migrants.

Niger's junta government, led by General Abdourahmane Tchiani, has officially revoked a 2015 law aimed at curbing the smuggling of migrants through a crucial migration route. The law, enacted in cooperation with the European Union (EU), empowered security forces and the courts to prosecute people smugglers operating in the Agadez region in central Niger. The recent decree involves the cancellation of convictions under this law, potentially leading to the release of those previously convicted. This move has added a new layer of complexity to the political tensions between Niger and EU countries, particularly in the aftermath of the July coup.

Assessment: The revocation of the 2015 law by Niger's junta raises concerns about the potential resurgence of migrant smuggling activities through the Agadez region, which has been described as the people smuggling capital of Africa. Each year, hundreds of thousands of migrants attempt to cross the Sahara Desert into neighbouring Libya, which has been a key route for people smuggling since the fall of the Gaddafi regime in 2011, and then into Europe. The potential releasing of people smugglers will also enable smuggling gangs to increase the scale of their operations. Whilst the revocation of the law has been sold by the junta government as a means to address security and human rights issues within Niger, it is highly likely that the junta has ulterior motives. Since the military coup in July 2023, the EU has suspended its aid to Niger, a country where over 60 per cent live beneath the poverty line and food insecurity is pervasive. It is highly likely that the humanitarian situation and poverty in Niger is turning many ordinary Nigeriens against the junta. There is a realistic possibility that the junta is threatening the EU with a wave of migrants in order to influence the EU into restarting its provision of aid to Niger, as an increase in migrants could threaten to destabilise the EU and cause friction on the continent. The revocation could also be a statement to external actors that the junta is asserting its control over the country's sovereignty and is no longer in a position where it will capitulate to foreign pressure.

EMEA Forecast. In the Netherlands, negotiations are underway to form a government but the winners of last week's election, the far-right Freedom Party (PVV) led by Geert Wilders, is facing challenges in garnering support. The likelihood of Wilders becoming prime minister is highly unlikely, as the party requires support from at least two moderate parties, who have already ruled out co-operation. It is likely that the Netherlands will experience political volatility for the foreseeable. A deal between Spain and the United Kingdom over Gibraltar is now highly likely, marking a significant development that could potentially resolve the status of the island and concerns related to border policing, addressing a longstanding issue that stems from Britain's 2016 vote to leave the European Union. Elsewhere, Finland has closed its entire border with Russia to travellers for the next two weeks. This move is aimed at addressing the unusually large

flow of asylum seekers to the Nordic nation. While the closure is an immediate response to the situation, it is considered highly likely that it is part of a broader plan, with allegations that Russia is purposefully trying to destabilise Europe by flooding it with migrants. In Africa, Abir Moussi, a prominent opponent of Tunisian President Kais Saied, initiated a hunger strike in prison on 28 November to protest a violation of her rights to freedom and political activity. This development comes amidst a broader trend of political volatility in Tunisia, with more than 20 leading political figures being detained by the police this year. With presidential elections anticipated next year, the tense political situation in Tunisia is likely to continue, potentially leading to further protests.

Starting on 2 December and continuing until 9 December, excluding 4 December, train strikes are scheduled to occur in the United Kingdom. The strikes are almost certain to impact daily train services during this period and will cause major disruption in the run up towards Christmas. COP28 in Dubai will continue through the next reporting period until 12 December and will attract senior politicians and business leaders from across the world. Travel disruption is widely expected and in a rare easing of restrictions, the Emirati government has permitted climate demonstrations. Whilst these are likely to be strictly regulated and policed, there is a realistic possibility that they too could cause disruption.

German authorities have arrested two boys aged 15 and 16 on suspicion of planning a militant Islamist attack, targeting a Christmas market or a synagogue. It is likely similar reports will occur across northern and western Europe in the coming weeks, emphasising the persistent threat of extremist activities during the holiday season, which have almost certainly been fuelled by the conflict in the Middle East. The Gulf of Aden is expected to witness an increase in attempted hijacks and piracy attacks, as evidenced by the third notable hijacking just south of Aden during this reporting period. The latest attack, carried out by Somali pirates, suggests an emboldened piracy presence in the region. The situation may be influenced by broader geopolitical dynamics, such as the efforts of Houthi rebels, contributing to heightened maritime security risks in the Gulf of Aden and the Red Sea. Such threats could raise insurance premiums in the maritime industry and potentially lead to shipping firms diverting their ships, resulting in increased fuel usage which will ultimately affect the consumer. A youth activist in the Democratic Republic of the Congo was killed during an opposition campaign rally in the east-central city of Kindu. The incident is highly likely indicative of escalating violence in the run-up to the 20 December election, suggesting a volatile and dangerous political environment in the country is likely as the election looms.

Winter storms have devastated much of southern Europe, including parts of Ukraine, Russia and other areas in the Black Sea leading to several fatalities. Storms have disrupted much of Turkey and have been so severe that a cargo ship was split in two, killing several. A separate front also brought broke winter records in Germany and similar events should be expected across the continent this winter. El Nino inspired weather continues to bring heavy rains and flooding to much of Kenya, Ethiopia and Somalia, displacing hundreds of thousands of people. Consequently, cholera epidemic in both Ethiopia and Somalia has broken out killing hundreds and threats to kill hundreds more as the regions struggle to access clean water and adequate sanitation highly likely worsens the situation. The World Health Organisation (WHO) has confirmed that Monkeypox is spread via sexual contact after conducting research in the Democratic Republic of the Congo as the country experiences its largest ever outbreak. This has prompted concern as several other African countries deal with an outbreak under the backdrop of insufficient vaccines for Monkeypox in Africa.



Asia Pacific (APAC)

North Korea:

North Korean leader reviews satellite imagery of sensitive US sites.

Throughout the reporting period, there has been multiple incidents suggesting that North Korea is enhancing its military capabilities and developing its cooperation with Russia. North Korean leader, Kim Jong Un, has allegedly reviewed satellite imagery of the White House and of United States aircraft carriers at the naval base in Norfolk Virginia, after North Korea launched its first successful spy satellite earlier in November. The spy satellite reportedly also took images of other sensitive sites such as the American base in Guam, military sites in Italy and South Korean military installations. North Korea has promised to launch more satellites and has started to re-militarise parts of its border with South Korea after Seoul suspended a key clause in a 2018 inter-Korean military agreement and resumed aerial surveillance near the border in response to Pyongyang's initial satellite launch. There has also been evidence released of Russia ships docking in North Korea's Rason Special Economic Zone which has been unused since 2018.

Assessment: Videos of Kim Jong Un reviewing the North Korean satellite's imagery is likely strategic messaging aimed at the United States and its allies, communicating that North Korea is in the process of enhancing its military capabilities, undoubtedly with support from Russia in exchange for North Korea arms for use in Ukraine. A lone North Korean imagery intelligence (IMINT) satellite that likely only can produce low-quality imagery, is unlikely to concern Washington. However, it is almost certain that North Korea intends on developing a constellation of satellites on different orbits that will maximise its coverage and through sustained cooperation with Russia, it is highly likely that the sophistication of North Korean imagery sensors will increase. Moreover, this development likely portends future improvements in other military fields, such as in submarine, air defence and ballistic missile technology, where Russia is a world leader. China accounted for 97 percent of all North Korean trade in 2022, indicating how international sanctions and poor market access are crippling the country. Military trade with Russia will likely be followed by cooperation in other areas and North Korea could receive support from Russia with food, oil, gas and even tourism. Such support will likely develop the economy and enable Pyongyang to commit to even higher levels of military expenditure. Such a trend will invariably concern South Korea and Japan and will likely prompt an increased militarisation of the region.

The Philippines:

Government and communist rebels resume peace talks.

On 28 November, the Philippine government and the New People's Army (NPA), the military wing of the Communist Party of the Philippines (CPP), publicly agreed to resume talks aimed at ending decades of armed conflict. The two parties agreed to a "common vision for peace" but no immediate ceasefire was forthcoming, with the most senior General in the Philippine army stating that operations against the armed group would continue for the time being.

Assessment: The internal conflict in the Philippines is Asia's longest running low intensity conflict and has seen roughly 40,000 people killed since 1969. Led by the NPA, the rebellion, which opposes the Philippines' close ties with the United States and wants left-wing parties to be part of the government, has been part of peace negotiations with the government before, but these have continually failed. The most recent were in 2019. However, when President Ferdinand Marcos Jr took office in 2022, he was immediately more open to peace talks and last week granted amnesty to several former rebels. It is likely that Marcos sees peace as a long-term goal that would ensure his premiership. It is also realistically possible that the Philippines sees the growing external threat of China as a serious threat to national security and is therefore seeking

to settle the domestic conflict in order to enable the armed forces to fully focus on external and territorial defence.

APAC Forecast. The incumbent, President Andry Rajoelina, has claimed victory in Madagascar's presidential election, but opposition parties rejected the results, even before their official announcement. Protests and unrest are likely to follow, and this could prompt the reimposition of curfews and bans on large gatherings in the capital. On 3 December, India is poised to announce the results of state assembly elections in five states, a significant development with implications for the upcoming 2024 general election. The competition is primarily between the incumbent Bharatiya Janata Party (BJP) and a newly formed opposition alliance known as INDIA. It is realistically possible that the outcome sparks protests and civil unrest, shaping the political landscape in the country prior to the general election. On 4 December, Chinese firm, Evergrande, will face a debt restructuring hearing. Failing to agree a deal will likely lead to liquidation of all the company's assets. The repercussions of such a decision could significantly impact the Chinese economy. Elsewhere, the Sri Lankan government has received informal notification of a debt-restructuring agreement with creditor nations. While official confirmation is pending, the agreement could pave the way for a second International Monetary Fund (IMF) loan, providing relief to the country's financial challenges and helping to stifle unrest.

Pakistan's high court has denied former Prime Minister Imran Khan, currently in jail, an open court trial. The government submitted reports citing threats to Khan's life, leading the special court to decide that the trial on leaking state secrets will take place in jail premises. However, it will be open to media and the public. The trial is set to commence on 1 December and may generate unrest, given the former prime minister's popularity with much of the population. In Australia, hundreds of activists swam or kayaked in the sea lanes outside of the world's largest coal port in Newcastle, New South Wales, disrupting the export of over 500,000 tonnes of coal from the world's second largest coal exporter. Further protests are expected if the government refuses to introduce any measures such as a thermal coal tax.

President Tsai Ing-wen of Taiwan has stated that China's leadership is currently too "overwhelmed" with internal issues to seriously consider an invasion of the island nation. Regardless of its validity, the statement is likely to prompt a response from China, most likely in the form of increased incursions challenging Taiwan's sovereignty. In Myanmar, ethnic rebel forces are sustaining their offensives against junta forces along several fronts in the north of the country. The government army has suffered a number of defeats, defections are high, and it has had to withdraw from many key areas. The country could collapse and ultimately be divided into several smaller states, with humanitarian concerns high as the government responds will air strikes.

Despite a surge in respiratory illnesses in China, the impact appears less severe than pre-pandemic levels. No new or unusual pathogens have been identified in recent cases. The rise in acute respiratory illnesses is attributed to the simultaneous circulation of various pathogens, with influenza being a predominant factor, all of which are likely being exacerbated by endemic poor air quality. In India's Gujarat province, unseasonably high rainfall has led to several deaths and flooding has caused much disruption. Whilst further heavy rain isn't forecast, the unseasonable weather points towards the unpredictable effects of climate change coupled with El Nino.

