



Global Intelligence Summary

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The **US** deployment of B-52 bombers near **Venezuela** and public confirmation of covert CIA operations on **Venezuelan** soil are **likely** intended as strategic messaging to Caracas to curb narcotics trafficking.

The presidential run-off in **Bolivia** between two right-wing candidates is **likely** to increase political polarisation, and proposed policy changes will **likely** trigger unrest among rural, Indigenous, and working-class communities.

Europe, Middle East & Africa (EMEA)

Industrial action and disruptive protests are **likely** to increase in **Belgium**, with the new Flemish nationalist government forced to implement austerity measures to satisfy EU fiscal targets.

The potential provision of Tomahawks to **Ukraine** would be **unlikely** to dramatically alter the war. However, the successes of the Ukrainian long-range campaign have **likely** conditioned a Russian proposal to deploy reserves.

Hamas operatives' arrests and executions targeting local rivals **almost certainly** show how the militant group is trying to re-establish administrative authority over parts of the **Gaza Strip** vacated by Israeli forces.

If the Houthis resume attacks in the **Red Sea** and **Gulf of Aden**, following an order to halt attacks due to the Gaza ceasefire, the claimed increased use of Sudanese waters would **likely** pose an increased threat to merchant vessels.

Civil unrest in **Ivory Coast** is **highly likely** as opposition members call for daily protests in the lead-up to the 25 October presidential election.

Civil unrest and security crackdowns in **Cameroon** are **highly likely** after the opposition leader claimed victory in the 12 October presidential election before official results are announced.

Civil unrest in **Madagascar** is **likely** to diminish following a military coup and the impeachment of President Rajoelina, but there is a **realistic possibility** of violence between rival military factions.

Asia-Pacific (APAC)

Despite the ceasefire, tensions between **Afghanistan** and **Pakistan** remain high, and there is a **realistic possibility** of ceasefire violations and renewed escalation.



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Americas (AMER)

Venezuela: US deploys strategic bombers and acknowledges covert CIA operations.

On 14 October 2025, the US military conducted another strike on a vessel off the coast of Venezuela, killing six people. The strike was carried out in international waters, and US authorities stated that the target was connected to narcoterrorist networks. On 15 October, US Air Force (USAF) B-52 Stratofortress strategic bombers were observed flying inside the Maiquetía Flight Information Region (FIR) north of Los Roques, Venezuela, close to the Venezuelan islands of La Orchila and Gran Roque, both of which host military facilities.

Later that day, the Trump administration publicly confirmed that it had authorised covert CIA operations in Venezuela targeting the Maduro regime's infrastructure and networks, framing them as part of a broader anti-narcotics effort. President Donald Trump also floated the idea of targeting Venezuelan drug cartels on land, suggesting that the US has now almost completely stopped drug trafficking by sea and would now seek to curb trafficking by land. Venezuelan President Nicolás Maduro condemned the US actions as destabilising and has accused Washington of orchestrating regime change. Venezuela has also mobilised military forces, civilian militias, and has forward-deployed air defence units.

Solace Global Assessment: The B-52 is a long-range strategic bomber with one of the largest payloads of any in-service combat aircraft. The B-52 is capable of deploying a range of weapons, including precision-guided bombs, cruise missiles, maritime strike weapons, and even nuclear munitions. The deployment of B-52s is typically associated with interstate conflicts or strategic deterrence. The flight path of the B-52s was relatively consistent with previous training exercises in the Caribbean, and while the bombers entered a Venezuelan FIR, they did not enter or violate Venezuelan sovereign territorial airspace.

Moreover, the B-52s operated largely on transponders and transited through controlled airspace. B-52 activity, combined with the current naval deployment and recent acknowledgement of CIA operations, has likely been calibrated to send a strategic message to Caracas to curb narcotics trafficking and deter escalation, rather than shaping activity for any direct military engagement.

The US is also likely signalling to Venezuelan allies like China, Russia and even Iran that Latin America remains firmly in Washington's sphere of influence. However, if Washington does not observe any constructive response from Caracas, there is a realistic possibility that the US could expand its operations to include strikes on vessels inside Venezuelan territorial waters or drone strikes against land-based targets. Such actions would significantly heighten the risk of escalation and miscalculation, especially as Venezuela has several Russian-derived air defence systems capable of engaging aerial threats such as US drones.



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US force projection in the Caribbean and the public confirmation of CIA operations have almost certainly increased pressure on the Maduro regime. The CIA has been implicated in a series of historical coups in Latin America, which have toppled or threatened regimes in Guatemala, Chile and Nicaragua. When combined with the recent awarding of the Nobel Peace Prize to Venezuelan opposition leader María Corina Machado, these developments have likely destabilised Venezuela and buoyed the opposition. The Maduro regime is likely to respond by consolidating power through security crackdowns, arbitrary arrests, censorship and increased military readiness, while framing US actions as illegal and a breach of Venezuelan sovereignty.

Bolivia: Presidential runoff scheduled for 19 October with no left-wing participation.

On 19 October, Bolivians will vote in the second round of the presidential election. The runoff contenders, who received the most votes in the first round on 17 August, are Rodrigo Paz Pereira of the Christian Democratic Party (PDC) and Jorge Quiroga, a former president and leader of the pro-business LIBRE group. Both leaders are on the political right, and both of their respective parties also performed well in the August parliamentary vote. The right's victory coincided with the collapse of the left-wing Movement Towards Socialism (MAS), which had governed Bolivia for two decades, but has now virtually disappeared from parliament. MAS's extremely poor performance stemmed from deep internal divisions between supporters of former President Evo Morales and those of incumbent President Luis Arce, which fractured the party's base and led to widespread voter abstention and null ballots, reportedly accounting for 19 per cent of all votes cast.

Evo Morales, who has been barred from running and faces multiple criminal charges, remains in his stronghold of Cochabamba, where he continues to command significant support. Pro-Morales demonstrators, viewing his exclusion from the race as anti-democratic, have repeatedly established roadblocks, staged protests and clashed with police in the lead-up to the first round of voting, resulting in multiple deaths, injuries, arrests and major disruption in Bolivia.

Solace Global Assessment: There is a realistic possibility that the second round of the presidential vote will trigger significant unrest in Bolivia. This is due to growing political polarisation among the supporters of the two winning parties, PDC and LIBRE, the discrepancy between the left's enduring popular support and MAS's poor electoral performance, and the continuing controversy surrounding Evo Morales' exclusion from the race.

Both PDC and LIBRE have increasingly leveraged inflammatory narratives to attack each other. For instance, Pereira's running mate Edman Lara (who has a wide social media following and is in many respects as, if not more, popular than Pereira) has stated that, if Quiroga were to win the runoff, this could only be due to "fraud" and has pledged to incite protests if that were to happen. In response, Bolivia's Supreme Electoral Tribunal (TSE) has called on the two candidates to sign an agreement to ensure a peaceful vote. This growing tension has also translated into attacks on democratic



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institutions. Juan Pablo Velasco, Quiroga’s running mate, recently accused the press of staging a “dirty war” against the campaign, following the publications of old tweets, reportedly from Velasco’s account, containing racist messages. Local civil society groups have noted that the 2025 electoral campaign has coincided with an observable increase in the number of attacks on journalists, in a pattern reminiscent of the 2019 election.

The lack of a left-wing alternative, following two decades of MAS dominance, is likely to drive widespread dissatisfaction with the result. Left-wing ideologies remain deeply rooted and popular across Bolivia, particularly among rural, Indigenous, and working-class populations in regions such as Cochabamba and the western highlands. MAS’s emphasis on social welfare, state control of natural resources, and Indigenous representation almost certainly continues to resonate strongly with much of the electorate. MAS’s poor performance in the general elections should not be interpreted as a loss of support for left-wing policies, but is likely more reflective of internal party divisions and voter abstention.

Controversial policies espoused by both Quiroga and Pereira are likely to be poorly received in rural, Indigenous and working-class communities. These include the proposed repealing of several welfare provisions supported by MAS and the reorientation of Bolivia away from traditional allies like Cuba and Venezuela towards the US, at a time when US foreign policy is focusing more on Washington’s near abroad. These include a nascent war against Mexican and Venezuelan cartels and even the proposed entry of the US Drug Enforcement Agency (DEA) into Bolivia, which was expelled by Morales in 2008, with MAS supporters traditionally viewing US actions in Latin America as interventionist, imperialist and destabilising.

These policy changes are likely to increase anti-government sentiment and become significant drivers of unrest. Even if large-scale unrest is not observed immediately after the presidential vote, the shift to the right is likely to catalyse widespread protests, roadblocks, and labour strikes in the long term, driven by fears of foreign interference, economic marginalisation, and the rollback of long-standing social protections, such as the reduction of fuel subsidies, which have been in place for over two decades. MAS-associated protests have become increasingly violent and disruptive, defined by the use of roadblocks, arson attacks, and clashes with security forces, and are likely to result in significant transport disruption, supply shortages and economic losses should they become an established tactic of the opposition.

AMER Summary and Forecast

Politics, Economics and Civil Unrest:



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US revokes visas of dozens of Mexican politicians.

On 14 October, Mexican officials reported that the US government had revoked more than 50 visas granted to elected officials and other high-ranking politicians. The move had been reportedly carried out in response to alleged ties between the officials and Mexican cartels, although Washington rarely provides an explanation for visa withdrawals, even when these affect high-profile individuals. Other sources reported that the “50 visas” figure only accounts for the ruling Morena party, with other political parties also being targeted by dozens of additional visa cancellations.

Second “No Kings” protests to occur across US on 18 October, with 2,500 events planned.

The first round of protests took place on 14 June and was attended by hundreds of thousands of people across all fifty states. While the first “No Kings” protests, which oppose perceived abuses of executive powers by the current administration, remained peaceful, the upcoming demonstrations occur at a time of increased political tensions due to several high-profile cases of political violence and the deployment of federal forces to several large US cities. There is a realistic possibility that protests, particularly in large cities that have been at the centre of the administration’s immigration crackdown, like Chicago, Portland, and Los Angeles, will turn violent. Protesters may stage road blockades targeting the cities’ main roadways, which could result in severe traffic disruptions. Finally, there is a remote possibility of more intense political violence, targeting protesters or security forces, due to the high visibility of the event.

Protests continue in Ecuador over cut to diesel subsidies.

On 15 October, a preliminary agreement was made for dialogue between protest leaders and authorities to end the ongoing wave of demonstrations over a cut to diesel subsidies in Ecuador. Dialogue, which is set to begin next week, was agreed after indigenous leaders dropped the demand for the government to reinstate the fuel subsidy, in favour of a request for a price freeze. Protests have been ongoing in Ecuador since President Daniel Noboa removed diesel subsidies on 13 September, triggering the Confederation of Indigenous Nationalities of Ecuador (CONAIE) to organise mass rallies to denounce the decision.

They constitute the third wave of major civil unrest since 2019. Imbabura has been a central location for the demonstrations, significantly damaging the local economy. Over the past week, multiple road closures persisted across Imbabura, Pichincha, Carchi, and Loja provinces. Police repeatedly fired tear gas in Quito, including inside El Ejido Park on 12 October, with large deployments of security forces and the military throughout the city. CONAIE alleged police fired live rounds and arrested people inside hospitals in Otavalo on 14-15 October, resulting in approximately 50 people injured and 31 detained. Reports indicated food and gas shortages in Imbabura and Cotacachi due to prolonged road blockades. Following the preliminary agreement, protesters agreed to lift roadblocks in Imbabura province. If an agreement is reached, demonstrations are likely to ease.



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Security, Armed Conflict and Terror:

Doctors Without Borders (MSF) “permanently” closes health facility in Haiti.

On 15 October, Doctors Without Borders (MSF) announced that it had permanently closed the Turgeau health centre in Port-au-Prince, which had been temporarily closed in March 2025. MSF channels stated that the rampant insecurity in Haiti and its capital, which is almost completely under the control of gangs, makes reopening the facility unfeasible. The Turgeau health centre had reportedly been repeatedly hit by gunfire during the clashes between police and the gangs, threatening both medical personnel and patients. The closure underscores how, so far, international and domestic efforts to ameliorate Haiti’s security conditions have failed. The interim government of Haiti has scheduled general elections for 14 November. However, with less than a month remaining, conditions on the ground make a nationwide election impractical, and only a limited or localised vote is likely to take place, with large sections of society dismissing it as illegitimate or symbolic.

Colombian President Petro seemingly signals openness to new talks with militant groups.

On 13 October, President Gustavo Petro announced on social media that he had “initiated contacts” with the Gulf Clan (AGC), “with Qatari mediation,” and called on the National Liberation Army (ELN) to resume negotiations. This development marks an unexpected revival of Petro’s “Total Peace” agenda, under which his administration sought to negotiate truces with Colombia’s armed groups after months of rising violence. Peace talks with the ELN had broken down in late 2024, and in January 2025, after the ELN launched a major offensive in the Catatumbo region that displaced more than 70,000 people and resulted in sustained clashes with the Colombian military. Petro’s selective overture to ELN and AGC but not Central General Command EMC, which has been implicated in several attacks that have killed dozens of civilians, may reflect a strategy of negotiating with one group at a time in order to more effectively deploy military resources. However, past periods of “Total Peace” have been heavily criticised for enabling armed groups to expand their recruitment, control and influence under reduced military pressure.

Environment, Health and Miscellaneous:

Flooding in Mexico results in at least 66 deaths and 75 people missing.

Central Mexico has been severely affected by heavy rainfall and flooding, which has resulted in significant casualties and damage. Civil protection reports indicate that at least 66 people have died and 75 are missing in the states of Veracruz, Puebla, Hidalgo, San Luis Potosí, and Querétaro. The Mexican government estimates that around 100,000 homes have been affected by the floods. Efforts to manage the aftermath continue, with emergency personnel engaged in clean-up operations across the impacted areas. Officials have attributed the flooding to several converging weather systems, with



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two tropical systems colliding with warm and cold fronts, which have triggered an unusually intense rainy season. Residents have reported that government warnings were insufficient, particularly in Poza Rica, raising the risk of civil unrest targeting perceived government failings once the flooding subsides.

Large fire near Lima, Peru, destroys 100 homes.

On 11 October, a large fire erupted in the area of Pamplona Alta, San Juan de Miraflores, to the south of central Lima. The fire spread rapidly in the residential area and reportedly destroyed around 100 structures and damaged around 300, rendering more than 250 people homeless, before being contained. According to local media, some reports indicate that the fire was deliberately set during a botched eviction attempt targeting some local families. Some cases of attempted looting of destroyed properties have been reported after the fire was contained. The severity of the incident has the potential to become a trigger of civil unrest in San Juan de Miraflores in the short term. This is especially the case as Peru is currently undergoing a severe political crisis, with Prime Minister Dina Boluarte being impeached on 10 October amidst large-scale protests.



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Europe, Middle East & Africa (EMEA)

Belgium: Large-scale protests turn violent in Brussels.

On 14 October, Belgian labour unions held a general strike protesting the newly appointed government's proposed austerity policies. The right-wing government coalition, led by Flemish nationalist Bart De Wever of the nationalist New Flemish Alliance, has introduced a series of sweeping reforms aimed at reducing Belgium's budget deficit, which currently exceeds the European Union's fiscal limits. These have included reductions in unemployment benefits, stricter rules on public sector employment, cuts to pensions and the rise of the state pension age from 65 to 67.

Demonstrations were organised nationwide, with significant disruptions observed in Brussels, Antwerp, Liège, Ghent, and Charleroi. In Brussels, organisers estimated that more than 150,000 people participated in the demonstration, while the police stated that approximately 80,000 people attended the rally. The protests turned violent in central Brussels, where participants vandalised a government building and a luxury hotel near the central train station. In response, police deployed tear gas and water cannon to disperse the crowds and conducted dozens of arrests.

The protests resulted in severe traffic disruption in the capital, with several major roads blocked and operations at both Brussels and Charleroi Airports were brought to a near standstill, as baggage handlers, security personnel, and other airport staff participated in the nationwide strike, and major disruptions also occurred at several of Belgium's key ports.

Solace Global Assessment: Fiscal rules set out by the EU in 2024 introduced a reformed framework under the Stability and Growth Pact, which mandates that countries with public debt over 60 per cent of GDP must reduce it by at least one percentage point per year on average. Member states with high debt must also submit four-year fiscal plans that detail their budgetary targets, reform commitments, and investment strategies. With Belgium's debt-to-GDP ratio currently estimated at over 106 per cent, placing it fourth in the EU, Belgium is already subject to an Excessive Deficit Procedure (EDP) launched by the European Council in July 2024. The Belgian government is therefore operating under enhanced EU fiscal surveillance and is required to implement a credible path to reduce its deficit and debt levels in line with EU targets.

The De Wever coalition campaigned on a platform that championed fiscal discipline and economic liberalisation. When combined with the strict rules established by the EU, the government will highly likely be forced to implement a broad package of unpopular austerity measures aimed at accelerating Belgium's debt reduction. These will likely include reductions in social welfare spending, pension reform, reduced unemployment benefits, and slashes to the public sector. As already evidenced by the nationwide strike and demonstrations, these policies are likely to be met with public resistance and industrial action. Some unions have already proposed the idea of regular nationwide demonstrations staged on the 13th of every month.



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As the new government attempts to introduce austerity measures, increased waves of strikes, protests and disruption are highly likely across Belgium. Unrest is likely to be most intense in Brussels and in the French-speaking Wallonia region, which incorporates major industrial cities like Liège and Charleroi, as this area has a long history of left-wing political dominance and powerful trade unions. Moreover, the new government is not only right-wing but also Flemish nationalist, a dynamic that is likely to exacerbate Belgium's entrenched linguistic and regional divisions.

Ukraine: Trump considers sending Tomahawks, Russia prepares potential reserve deployment.

US President Donald Trump and Ukrainian President Volodymyr Zelensky are expected to meet at the White House on 17 October, with senior Ukrainian officials having arrived in Washington, DC earlier in the week. The meeting follows a phone call between the US and Ukrainian leaders on 12 October, during which Trump stated he said that he may give Russian President Vladimir Putin a new ultimatum to resume serious talks, or the US will provide Ukraine with the long-range Tomahawk cruise missile system.

Putin stated that the provision of Tomahawk would be a "completely new, qualitatively new stage of escalation" on 12 October, and on 13 October, Trump stated he had "sort of made a decision" on Tomahawk. Zelensky's visit to the White House is expected to primarily revolve around discussions on potential arms supply, most notably Tomahawk, but also more Patriot air defence systems.

On 13 October, a Russian Ministry of Defence-backed draft amendment was approved that will allow the deployment of Russia's active reserves abroad without the requirement for Russia to be at war. Pending formal approval and implementation, the amendment would allow Moscow to use its approximate two million active reservists in Ukraine, which it has been legally unable to do so far, as Russia has not declared war on Ukraine.

Solace Global Assessment: The successes of Ukraine's long-range strikes campaign against Russian energy infrastructure have been significant. On 14 October, the International Energy Agency (IEA) adjusted its forecasts for the impact of Ukrainian strikes on Russia's refinery processing rates, stating they will be suppressed until at least mid-2026. The IEA calculates that Russian fuel exports in September were the lowest monthly amount in a decade, excluding April 2020 during the COVID-19 pandemic.

Russia's primary advantage on the frontlines has been its extensive pool of manpower, which provides Russia with the capacity to sustain prolonged offensive operations and absorb heavy losses, and has also enabled Russia with greater operational flexibility and endurance than Ukraine. The Kremlin has previously been able to sustain the vast manpower demands without resorting to mass mobilisation or conscription through the use of considerable financial incentives to



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volunteer recruits. Moscow's large-scale mobilisation drive in 2022 led to protests and a mass exodus of Russian males fleeing the country to avoid military service, which the Kremlin is almost certainly heavily incentivised to avoid. Support for the war against Ukraine is still likely broadly high amongst the Russian population, but mass mobilisation could undermine popular support for the war.

The Russian war effort remains heavily dependent on revenue from hydrocarbons. However, Ukraine's long-range strike campaign on the Russian oil and gas industry, combined with sanction regimes, has almost certainly curtailed revenues and undermined Moscow's ability to offer financial incentives to troops. The proposed amendment to the reservist deployment laws will enable the Kremlin to bypass the politically sensitive act of mass mobilisation, allowing it to alternatively deploy trained reservists who have already signed voluntary contracts with the Russian Ministry of Defence without an official mobilisation declaration. Russia claims that it currently has two million members within its active reserve, compared to the Armed Forces of Ukraine's (AFU) estimated 880,000 active personnel. However, as these are trained soldiers and tensions with NATO remain heightened, Moscow is unlikely to deploy much of its strategic reserve. The law change is likely partly aimed at communicating to the West that Russia has the manpower and resolve to sustain the conflict over the long term.

The provision of Tomahawk would be unlikely to dramatically increase the strategic impact of Ukraine's long-range campaign. Estimates differ, but broadly it has been anticipated that the US would only provide a limited number of Tomahawks to Ukraine if the proposal goes ahead. However, Tomahawk's advantages compared to Ukraine's current long-range threat, which primarily consists of long-range attack drones (excluding relatively crude domestically produced missile systems like Flamingo), may enable Ukraine to achieve operational successes against strategic targets such as the Yelabuga drone factory, which would require larger explosive payloads to be delivered and more comprehensive air defence to be penetrated.

The use of Tomahawk by Trump as a means of leverage over the Kremlin is also notable. Trump has already alluded to a new ultimatum to compel Moscow to engage seriously in talks, using the provision of Tomahawk as the coercive threat. The plausibility of Trump's ultimatums has likely increased, following his claims on 15 October that India's Prime Minister Narendra Modi has agreed to stop buying Russian oil under threat of tariffs. Moreover, the Trump administration is now threatening tariffs of up to 500 per cent against China, specifically to prevent the purchase of Russian oil.

Messaging from the Kremlin has almost certainly sought to deter the provision of Tomahawk by increasing the risks of escalation involved. Kremlin officials and mouthpieces frequently refer even to the capability of some Tomahawk variants to carry nuclear warheads. According to a senior Western military official, the delivery of Tomahawks could be conducted



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quickly, with the potential for US contractors being deployed to assist in their use to remove the need for extensive and lengthy training of Ukrainian forces, in addition to allowing the Pentagon to retain control over targeting and sensitive technologies. This would almost certainly be treated by the Kremlin as an escalation, which in turn would likely provoke a further increase in the Kremlin's ongoing and intensifying campaign of 'hybrid' operations. There is also a realistic possibility that Moscow would adapt its targeting patterns in Ukraine to increasingly target directly assets associated with the US and European allies with long-range fires.

The Gaza Strip: As ceasefire takes effect, Hamas cracks down on rival groups.

Since the withdrawal of Israel Defence Forces (IDF) from large portions of the Gaza Strip's territory as part of the ongoing ceasefire agreement, Hamas operatives have carried out several arrests and public executions in areas they recently re-entered. Videos of the executions have been widely shared online by pro-Hamas accounts and users affiliated with the group. Some of the executions have targeted clans and other groups that have previously challenged Hamas for control of parts of the Gaza Strip. Over the 10-13 October period, Hamas operatives reportedly executed at least 32 members of an unspecified "criminal gang". On 12 October, local media reported that Hamas had attacked suspected members of the Doghmush clan in Gaza City, killing 19.

Solace Global Assessment: The executions and raids almost certainly reflect Hamas' prioritising the re-establishment of its position as the only viable administrative authority within the Gaza Strip, and its intention to fill the security void left by retreating IDF forces. Hamas had allocated resources to degrade rival clans and groups throughout the conflict that started after the 7 October 2023 attack. In March 2024, Hamas members killed several key leaders of the Doghmush clan, despite the ongoing high-intensity Israeli strikes and ground attacks in Gaza. Just before the ceasefire, on 3 October, Hamas fighters had carried out an attack on the Mujada clan in Khan Yunis.

It is highly likely that Hamas will continue to conduct high-intensity attacks against perceived rival factions in the short term. Although such actions may provoke public backlash in both Gaza and within the international community, especially as civilian casualties among unaffiliated individuals are likely, Hamas leadership likely judges that failing to suppress emerging rival power centres would pose a greater long-term threat to its authority than the short-term political fallout from continued violence.

The attacks, which are likely indicative of Hamas attempting to consolidate power in the Gaza Strip, are likely to undermine the prospects of long-term peace. While several key mediators of the Israel-Hamas ceasefire, including the US, have so far refrained from condemning the killings, the attacks likely indicate Hamas' intent to remain armed and in control of Gaza, two non-negotiable "red lines" for both Tel Aviv and Washington.



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Yemen & Red Sea: Houthi leader reportedly orders halt in attacks against Israel and vessels.

The leader of the Yemen-based Houthis, Abdul-Malik al-Houthi, has reportedly ordered his forces to halt attacks against Israel and Israeli-linked vessels in the Red Sea and Gulf of Aden. The order comes following the start of the ceasefire in the Gaza Strip, with support for Palestine being the stated purpose of the Houthi campaigns. The halt is conditional on Israel observing the ceasefire.

Solace Global Assessment: Following the January 2025 Gaza ceasefire, the Houthis announced that they would suspend their maritime campaign against all but Israeli-flagged vessels and vessels wholly owned by Israeli individuals or entities. Therefore, the current reporting indicates that the Houthis have suspended their maritime campaign altogether. However, the reporting relies on unnamed and uncorroborated sources briefing the Saudi press, not official Houthi statements. Moreover, the suspension of attacks is contingent on the stability of the Gaza ceasefire, which remains fragile, as both Hamas and the IDF have reportedly breached certain terms of the agreement.

The Houthis will almost certainly use any pause in Israeli air strikes against Yemen and their maritime campaign as an opportunity to replenish stockpiles and bolster their capabilities. The Houthis have been able to use their campaigns to transform themselves into a powerful regional player with a global impact. Furthermore, recent reports highlight that the Houthis and Iran have shifted their weapon smuggling operations towards Sudan's coastline in the Red Sea. If this is confirmed, the Houthis are almost certainly exploiting the instability of Sudan to enable the transfer of advanced weapon systems such as long-range attack drones from Iran, the primary patron of the Houthis.

Sources have suggested that Iranian advisors have been active in Sudan since late 2023, and that Houthi personnel may also be present in the war-torn country. The increased use of Sudanese territorial waters by the Houthis would likely increase the threat to Red Sea shipping should attacks resume, and may additionally be a factor in the increased lethality of individual Houthi attacks against merchant vessels in 2025. The Houthis have likely struggled with poor intelligence, surveillance and reconnaissance (ISR) capabilities, given the inaccuracy of their attacks and the frequent assessed misidentification of vessels, at different times in their campaign, which started in November 2023. The use of Sudanese waters, or even the coast of Sudan itself, as a base to conduct ISR operations from assets such as skiffs equipped with reconnaissance drones or shoreside ISR systems, would likely increase the ability for the Houthis to find, fix, track and target vessels transiting parts of the Red Sea that are typically beyond the effective range of their existing ISR assets in Yemen and Yemeni waters.

Ivory Coast: Opposition parties call for daily protests ahead of presidential election.

On 11 October, at least 237 people were arrested in demonstrations targeting alleged increasing government authoritarianism ahead of the 25 October presidential election. The prefect of Abidjan had declared that all marches in



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the capital were illegal in the run-up to the election, due to the need to maintain order. Security forces cracked down on protests, using tear gas and makeshift roadblocks.

Following the protests, Ivory Coast's two main opposition parties called for daily protests on 12 October. Among those calling for demonstrations were former leader Laurent Gbagbo and Tidjane Thiam. Thiam, the leader of the Democratic Party of Côte d'Ivoire (PDCI), was the primary challenger to Ouattara, although he was legally removed from the electoral register due to holding dual French-Ivorian nationality at the time of registration.

Solace Global Assessment: Increasing state repression has characterised the lead-up to the election, causing observers to warn of democratic instability. In August 2025, six members of one of the Ivory Coast's largest opposition parties were arrested, sparking criticism from civil society groups. On 9 August, thousands of Ivorians took to the streets in Abidjan to protest the decision with banners, stating "Enough is enough". While Ouattara's economic record is regarded as strong, his recent authoritarianism has almost certainly united opposition members.

The risk of unrest has significantly increased following Gbagbo and Thiam's call for demonstrations and will almost certainly increase should Ouattara be perceived as unfairly winning the election. Ivory Coast has not had a fully peaceful or uncontested transfer of power since the death of President Félix Houphouët-Boigny in 1993, and previous contested elections in the Ivory Coast have triggered widespread violence. The 2010 presidential election saw then-president Gbagbo and Ouattara both claim victory, which escalated into the Second Ivorian Civil War, eventually resulting in the deaths of over 3,000 people.

The reconciliation process from the Second Ivorian Civil War is still incomplete, with the Commission for Dialogue, Truth, and Reconciliation (CDVR) unable to implement its recommendations. The process of reconciliation has been marred by accusations that Gbagbo's camp has been disproportionately prosecuted, while Ouattara's forces were largely overlooked, and deep mistrust persists between northern pro-Ouattara communities and southern pro-Gbagbo communities. While a return to civil war is currently unlikely, the unresolved political tensions in the country significantly raise the risk of widespread opposition-led protests against the government, marked by violent clashes with security forces and potentially major disruption to businesses and services.

Cameroon: Opposition leader claims presidential election victory.

On the morning of 14 October, opposition leader Issa Tchiroma Bakary unilaterally declared victory in the presidential election in a five-minute speech posted on social media, in which he urged incumbent President Paul Biya to concede. Bakary's declaration comes despite the Constitutional Council, the official electoral body, not having yet declared the election results. No official government response has been issued.



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Following the victory claim, protests erupted in multiple cities on 15 October to demonstrate against perceived vote-counting irregularities. In Douala, Cameroon's economic hub, protesters clashed with security forces, who deployed water cannon to disperse the crowds. In Dschang, protesters set the courthouse, public prosecutor's office, and ruling Cameroon People's Democratic Movement (CPDM) headquarters ablaze while police deployed tear gas and conducted arrests. Demonstrations occurred outside the courthouse in Kousseri, and in Limbe, while celebrations over Bakary's alleged victory occurred in Bafang.

Solace Global Assessment: While the Constitutional Council has nearly two weeks to officially announce the results, it is highly likely that Bakary's declaration of victory will motivate the body to speed up the process. Results are highly likely to favour Biya, whose government has become increasingly repressive. Starting in 2016, harsh measures have been imposed on the Anglophone communities in the Northwestern and Southwestern regions, which comprise approximately 15 to 20 per cent of the population. At least 3,000 people have been killed and nearly 700,000 people displaced in the violence. The government has also cracked down on civil society, arresting and intimidating journalists and opposition figures, preventing criticism of the government, and denying permission for gatherings.

The 2018 election resulted in protests across the country led by opposition figure Maurice Kamto, which the government responded to with a heavy crackdown and excessive force against demonstrators. Protests have occurred since, with tear gas and water cannons used against peaceful protesters in September 2020. Cameroon's population has struggled with unemployment and a rising cost of living. Cameroon's young population remains politically disenfranchised, with many viewing the government as deeply corrupt under President Paul Biya, who has ruled since 1982.

Bakary's declaration makes competing narratives over the election result highly likely, with Bakary poised to allege electoral manipulation. Protests have already been observed, and should Biya claim victory, the disillusioned youth will likely be easily mobilised via social media, particularly in light of the recent success of protest movements in Nepal, Madagascar, and Morocco. As with 2018, anti-government demonstrations will almost certainly be met with severe crackdowns, with security forces highly likely to use live ammunition, crowd-dispersal measures such as tear gas and water cannon, internet blackouts, and mass arrests.

Madagascar: President Rajoelina impeached following military coup.

Following ongoing protests in Madagascar since 25 September, the situation escalated on the morning of 12 October, when multiple domestic and regional sources indicated that a potential coup was underway. At 09:10 local time, the Presidency of the Republic of Madagascar released a statement declaring, "An attempt to seize power illegally and by force, contrary to the Constitution and to democratic principles, is currently underway."



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Soon after, the Army Corps of Personnel and Administrative and Technical Services (CAPSAT), an influential military unit that was instrumental during the 2009 political crisis in Madagascar and helped President Rajoelina rise to power, released a video stating that the Madagascan Armed Forces (MAF) are now managed from their command centre. This effectively places operational control of the country's armed forces under CAPSAT, with General Demosthenes Pikulas reportedly appointed as head of the MAF. The same day, President Andry Rajoelina was exfiltrated by a French military plane from Sainte-Marie Island, after leaving Madagascar via helicopter.

On 14 October, Rajoelina dissolved the National Assembly ahead of expected impeachment proceedings against him. The vice president of Madagascar's National Assembly declared this move as legally invalid, and the proceedings went ahead, with lawmakers voting to impeach Rajoelina. Of the 163-member National Assembly, 131 members of parliament took part in the vote, with 130 voting in favour of impeachment.

Minutes after the vote, a Madagascar army Colonel Michael Randrianirina declared that the military had taken charge of the country. According to the statement, the military will dissolve all institutions except the lower house of parliament. Randrianirina was subsequently named the interim president. The Madagascar High Court has called for general elections to be held within 60 days.

The office of the currently exiled and now deposed president, Andry Rajoelina, issued a statement on 14 October. It condemned the decision of the HCC and the transfer of power to Colonel Randrianirina as illegal and unconstitutional. It furthermore stated that Rajoelina remains "fully in office".

Following Rajoelina's impeachment, protests have subsided and have been replaced by celebrations, with Gen Z Madagascar representatives stating, "[t]he change underway in Madagascar is not a coup d'état, but a popular awakening. No power has been seized by force. Citizens, associations, students, unions, and the military have acted out of conscience and patriotism". They also stated that "this is not the time to seek personal interests, but to find urgent solutions to the problems". Following the coup, the African Union (AU) has suspended Madagascar with "immediate effect". Randrianirina has declared that he is open to talks with the AU.

Solace Global Assessment: The rival claims of legitimate governance from both Rajoelina and Randrianirina are almost certainly a source of potential instability. Rajoelina, whose current location may reportedly be Dubai in the United Arab Emirates (UAE), is highly unlikely to be able to successfully challenge his ousting in the short term.

While there is a realistic possibility that Rajoelina supporters will stage small-scale rallies, the broader wave of protests that began on 25 September will likely diminish following Rajoelina's impeachment and de facto removal from power.



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However, in the medium-long term, there is a realistic possibility that the composition of the Transitional National Defence Council or the absence of a credible and transparent roadmap toward democracy will trigger renewed political instability and increase the risk of large-scale unrest in the coming months.

The primary current security risk in Madagascar is likely the status of the gendarmerie, whose forces are almost certainly not fully aligned with the newly established military authorities and have been implicated in past incidents of excessive force and abuses against protesters. A gendarmerie commander warned against its disbandment, according to local media, leading another commander to respond with a call for unity and to reiterate that the gendarmerie will obey orders, regardless of who is in power.

The newly appointed Commander of the Gendarme Forces, General Nonos Mbina Mamelison, has urged gendarmes not to be influenced by rumours or incitement. During the initial stages of the coup on 11 October, the US Embassy in Madagascar reported an exchange of gunfire between gendarmerie and military forces in downtown Antananarivo near Lake Anosy. There remains an elevated risk of violence breaking out between rival factions within the security forces if CAPSAT fails to reassert command.

EMEA Summary and Forecast

Politics, Economics and Civil Unrest:

Sébastien Lecornu re-appointed prime minister in France only days after his government collapsed.

Sébastien Lecornu was reappointed to the post of Prime Minister on 10 October by President Emmanuel Macron. Days prior, on 6 October, he had resigned after his government had been in power for only 14 hours. On 14 October, Lecornu made a speech at the National Assembly, where he called on parliamentarians to seek “compromise” with the government over contentious elements of the 2026 budget and, most importantly, pledged to suspend the implementation of the extremely controversial pension reform until after the 2027 presidential election. Lecornu’s speech and his concessions over pensions were almost certainly aimed at appeasing the Socialist Party (PS), which highly

likely remains the only political force capable of preventing another government collapse. On 15 October, Lecornu overcame the first major hurdle of his second government, defeating a no-confidence motion thanks to the crucial votes of the PS and the centre-right Republicans (LR). However, Lecornu’s ministry remains highly unstable, and further political developments could again force him to step down.



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Clashes in Udine, Italy, ahead of Israel-Italy football match.

On the evening of 14 October, clashes were recorded between pro-Palestine demonstrators and police officers ahead of the Football World Cup qualifier game between Italy and Israel's national teams. According to Italian media, 11 police officers and two journalists were wounded while 13 protesters were arrested. The protest follows weeks of frequent outbreaks of Palestine-related unrest in Italy, which have resulted in violent clashes in several cities, particularly in the country's north. Italy is scheduled to host the next Winter Olympics in February and March 2026, and further Palestine-related protests will highly likely occur around the event, even if the current ceasefire between Israel and Hamas holds.

Gen Z protest movement announces further protests in Morocco.

On 14 October, Gen Z 212, the organisers of the recent wave of protests that left three dead and over 500 arrested, have called for peaceful protests to resume on 18 October. The call for renewed protests is in response to the perceived use of excessive force by security forces, who conducted mass arrests and used live ammunition after protesters reportedly stormed a local police station. In particular, the death of recently graduated film-maker Abdessamade, whose brother claims he was a "peaceful man" who was filming the protests, has sparked calls for a transparent investigation into his death. The call for renewed demonstrations comes despite apparent concessions by King Mohammed VI, who called for accelerating reforms to create jobs for young people, improve public services, and reduce regional inequalities on 10 October. Gen Z 212 is largely coordinated through Discord, which has over 200,000 subscribers. The protests will likely be widespread, and any violent crackdowns from security forces will likely once again ignite the civil unrest.

Thousands protest in Gabes, Tunisia, over toxic emissions.

Protests against toxic emissions from the Tunisian Chemical Group's phosphate plant in Gabes, Tunisia, have led to significant clashes between police and protestors. On 11 October, protestors entered the chemical factory, demanding its closure due to pollution and health concerns, prompting security forces to use tear gas to disperse the crowd. The situation escalated with the administration building at the plant being set on fire during the protests.

By 14 October, over 130 students and residents had been treated for toxic inhalation from the plant's emissions amid the demonstrations. On 15 October, local media shared footage of ongoing clashes, including the use of smoke canisters and firecrackers. The protests were triggered by reports of dozens of schoolchildren suffering breathing difficulties caused by the toxic fumes. Amid recent successful protest movements in Nepal, Madagascar, and the nearby Morocco, there is almost certainly a heightened risk of the demonstrations spreading and becoming a broader anti-corruption movement targeting President Kais Saied's government, which has become increasingly repressive.



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Opposition wins Seychelles presidential elections.

On 12 October, Patrick Herminie, the leader of the United Seychelles (US) party and former parliament speaker, won the runoff presidential vote against incumbent President Wavel Ramkalawan, with 52.7 per cent of the total vote. US is a left-wing party which had ruled the country uninterruptedly between 1977 and 2020. The elections occurred without any notable disruptions. However, civil unrest cannot be ruled out in the short term. These may be caused by further developments regarding key campaign issues, most notably the controversial granting, by the Ramkalawan government, of a luxury resort building permit on Assumption Island to a Qatari company, which provoked significant opposition from environmentalist groups and several local communities. Additionally, policy reversals, anti-corruption investigations, or shifts in foreign partnerships, especially regarding ties with India and the UAE, both of which have sought increased influence in the southern Indian Ocean, could generate domestic unrest or diplomatic fallout.

Security, Armed Conflict and Terror:

Belgium arrests three for allegedly planning drone attack on Prime Minister.

On 9 October, Belgian authorities said that they had arrested three individuals for planning a “jihadist-inspired terrorist attack” targeting the country’s prime minister, Bart De Wever. The group allegedly planned to drop improvised explosive devices (IEDs) from drones. Some reports indicate that the Mayor of Antwerp, Els van Doesburg, may have also been a target, as well as far-right Dutch politician Geert Wilders. Wilders decided, after the plot was uncovered, to suspend his campaign for the Netherlands’ general elections, scheduled to occur on 29 October. Drones have featured heavily in recent propaganda by the Islamic State (IS) and other Islamist groups, who have called on supporters to use cheap and commercially available off-the-shelf drones to stage attacks.

Four Nigerian soldiers killed while repelling suspected ISWAP attack in Borno State.

On 10 October, four Nigerian soldiers were killed and five wounded while repelling a suspected Islamic State West Africa Province (ISWAP) attack on a military post in Ngamdu, Borno State. Attackers reportedly used rocket-propelled grenades, armed drones, and improvised explosive devices, which were laid along the Ngamdu-Damaturu main supply route. The military reported the deaths of at least 15 insurgent members. Open-source images reveal that the drones used were commercially available weaponised quadcopter drones, highly likely a DJI Matrice 400.

While military statements attributed the assault to “Islamist insurgents”, the nature of the attack adhered to ISWAP’s tactics, techniques and procedures (TTPs), and ISWAP propaganda channels have claimed responsibility. While Boko Haram, a rival terror group operating in the region, was the first African terror group to use drones, in 2018, their use has been limited to intelligence, surveillance and reconnaissance (ISR), as well as recording videos for propaganda purposes, with no confirmed reports of weaponised drone use. Furthermore, Boko Haram typically attacks civilians, opting for a



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lower-risk form of targeting than well-defended military bases. ISWAP, on the other hand, has increasingly used weaponised drones and targeted numerous military bases under the campaign name “holocaust of the camps”. The 10 October attack on Ngamdu almost certainly adhered to ISWAP’s strategy and TTPs, and further attacks are highly likely.

RSF kills at least 53 civilians in Al Fashir, Sudan.

On 10 October, the paramilitary Rapid Support Forces (RSF) conducted a shelling and drone attack on Dar al-Arqam, a displacement shelter in Al Fashir, North Darfur, killing 53 civilians and wounding another 21. The attack is the latest in a series of attacks on civilian areas in Al Fashir, the capital of North Darfur and the last major holdout of the Sudanese Armed Forces (SAF) in the region. Since recapturing Khartoum in March 2025, the RSF have intensified attacks on the besieged city, attempting to capture it and consolidate its territory in western regions of Sudan. By targeting civilians, the RSF almost certainly aims to displace civilians and degrade infrastructure, increasing pressure on the SAF. Further attacks on civilians, as well as aid workers, are highly likely.

DRC government and AFC/M23 militants sign ceasefire mechanism in Kivu.

On 14 October, the Congolese government and insurgent AFC/M23 militants signed a Qatar-mediated ceasefire monitoring mechanism in North and South Kivu. The mechanism places the International Committee of the Red Cross (ICRC) as a neutral intermediary for the identification and release of detainees. The mechanism aims to help the process of repatriation of Congolese refugees from neighbouring countries, for which the government is demanding identification and is refusing repatriation, while AFC/M23 demand unconditional repatriation. The issue is one of a few sticking points in the ongoing peace talks, and the assignment of the ICRC as intermediary almost certainly marks an important step in ending the conflict in the region. However, numerous obstacles remain, including the withdrawal of AFC/M23 from its captured territory, which the insurgent group is unwilling to do.

ADF rebels kill at least 19 in eastern DRC.

Overnight on 12 to 13 October, Allied Democratic Forces (ADF) rebels, an element of the Islamic State Central African Province (ISCAP), killed at least 19 civilians in the village of Mukondo in North Kivu, 30 kilometres south of Beni. The militants reportedly wore uniforms resembling those of the Armed Forces of the Democratic Republic of the Congo (FARDC), before attacking villagers with guns, knives, and clubs, according to a witness report. Eight villagers were also injured and 26 houses burned, according to local civil society leader Espoir Kambale. Kambale declared that “[w]e are questioning how the insurgents managed to assault us when we believed the village was secure”. It is highly likely that the use of disguises was not only aimed at getting ADF militants into the village undetected, but also to undermine trust in the FARDC. The village has been targeted previously by the ADF, with at least 39 civilians killed in March 2023 during International Women’s Day celebrations. The attack was highly likely carried out by militants from the Abwakasi Camp,



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one of three remaining ADF camps, which has become the deadliest unit since mid-2024 and has been prolific in Islamic State (IS) propaganda. The camp accounts for over half of the ADF's total reported civilian fatalities in 2025. The camp is led by Ahmad Mahmood Hassan (alias Abuwakas), a Tanzanian explosives expert responsible for several attacks, including, according to Ugandan officials, the raid on the Mpondwe-Lhubiriha Secondary School in Kasese District, Uganda, which killed at least 38 students. In recent months, the camp has been responsible for numerous civilian massacres, killing 6 from Kasanga, Kingi, and Fungula-Macho villages on 23 September and 71 at a funeral in Ntoyo overnight 8-9 September.

Environment, Health and Miscellaneous:

Spain's Storm Alice causes flooding and disruptions in Catalonia, Valencia and the Balearic Islands.

Spain's State Meteorological Agency (AEMET) declared that Storm Alice is the first high-impact DANA (Isolated Depression at High Levels) of the autumn season. The storm, which impacted Catalonia, Valencia and the Balearic Islands between 10-13 October, led to severe rainfall, flooding and considerable transport disruptions. The province of Tarragona in Catalonia was particularly affected, with a suspension of schools in multiple townships and the closure of multiple roads due to flooding. Train services between Valencia and Barcelona were halted, and there were major flight disruptions in the Balearic Islands (including Mallorca and Ibiza), in addition to power outages in Formentera, Menorca and Ibiza.

AEMET is now naming DANAs that are forecasted to have a high impact, with Storm Alice being the first to be named under the new initiative. This is likely part of a broader initiative to enhance the monitoring and alerting of DANAs, following the Autumn 2024 Spanish floods, which was one of the deadliest natural disasters in modern Spanish history. The floods, which were caused by a DANA, resulted in over 280 fatalities and caused billions of euros in economic damage. The disaster sparked widespread criticism of Spain's early-warning and emergency response protocols, with both regional and national authorities accused of underestimating the risks and failing to provide sufficient early warning or coordinate the timely evacuations in several high-risk zones. More DANA systems will likely impact Spain within the next two months, as unstable atmospheric conditions persist over the western Mediterranean during the autumn transition period. While most of these systems are unlikely to result in catastrophic flooding, they can still increase the risk of localised flooding, landslides, and transport disruption.

At least 69 people injured in train collision in Slovakia.

On 13 October, a train collision occurred near the village of Jablonov nad Turňou in Rožňava, Slovakia, resulting in 69 injuries, with one passenger still in serious condition and 13 others in moderate condition. The incident occurred when two trains collided head-on, initially causing a halt in rail services in the area. Emergency services responded promptly, deploying six ambulances and two helicopters to the scene. The transport ministry has since restored traffic between Jablonov and Turnou. The incident has been closely monitored by Slovakian authorities, with the health minister revising



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the initial injury toll from 91 to 69. Interior minister, Matúš Šutaj-Eštok has stated that human error may be to blame. If, following an investigation, the issue is found to be with the infrastructure, there is a realistic possibility that protests will take place.



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Asia Pacific (APAC)

Afghanistan and Pakistan: Border clashes after airstrikes target Kabul.

Taliban and Pakistani forces clashed on the night of 11-12 October, after Taliban forces attacked multiple military outposts on the Afghanistan–Pakistan border. The clashes follow a Pakistani airstrike in Kabul on 9 October, which was allegedly targeting the Tehrik-e-Taliban Pakistan (TTP) leader, Noor Wali Mehsud. According to Taliban reports, 58 Pakistani soldiers were killed and around 25 military posts were captured in the border fighting. The Pakistani military reported that only 23 of its soldiers were killed and claims to have killed hundreds of Taliban fighters.

No fighting was recorded on 13 October along the 2,611 km border known as the Durand Line, which Afghanistan has never formally recognised. However, major border crossings remain closed and trade has been suspended. Pakistan's Interior Minister Mohsin Naqvi condemned the attacks as unprovoked, stating that the attacks represent a serious breach of border security and could threaten regional stability. Naqvi emphasised that Pakistan reserves the right to defend its territory and respond to any aggression, while also calling on the Taliban to prevent militant groups from operating across the border. On 15 October, Afghanistan and Pakistan agreed to a 48-hour ceasefire starting from 18:00 Pakistan local time, just hours after a second wave of Pakistani airstrikes was recorded in Kabul.

Solace Global Assessment: The Taliban offensive was almost certainly retaliation for recent Pakistani airstrikes on 9 October in Kabul and Paktika Provinces. Pakistan has long accused the Taliban of harbouring terrorists within Afghanistan, primarily the TTP (also known as the Pakistani Taliban), a coalition of extremist Islamist militant groups operating primarily in Pakistan's tribal regions and in the Afghanistan-Pakistan border regions. Founded in 2007, the TTP's primary objective is to overthrow the Pakistani government and replace it with an Islamic emirate governed by its strict interpretation of Sharia law. The TTP regularly conduct attacks in Pakistan from Afghanistan, and in recent months has escalated its attacks in restless border provinces like Khyber Pakhtunkhwa and Balochistan. The Pakistani Air Force regularly conducts airstrikes in Pakistan to target TTP strongholds, senior leadership, logistic networks, particularly in the tribal belt and border districts. However, airstrikes in Kabul are rare and would have likely crossed the Taliban's tolerance threshold, as strikes in the capital would likely be perceived not only as a major violation of Afghan sovereignty but also as a direct challenge to the Taliban's authority and control.

Despite the ceasefire, tensions between Afghanistan and Pakistan remain high, and there is a realistic possibility of ceasefire violations and renewed escalation. Relations had likely already deteriorated following India's recent diplomatic overtures to Afghanistan and the eight-day visit to New Delhi by Taliban Foreign Minister Amir Khan Muttaqi, with Islamabad also alleging that Indian sponsors militancy within Pakistan. Some analysts have warned of all-out war between



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the Taliban and Pakistan. However, this is currently unlikely as Pakistan is struggling with a host of issues, including economic instability, domestic militancy and political unrest, and would also be reticent to push the Taliban more towards regional rivals like India.

Moreover, Pakistan maintains clear air superiority over Afghanistan, with advanced combat aircraft and precision strike capabilities, while the Taliban's air defence infrastructure remains limited and largely ineffective, and will likely rely on this to pressure the Taliban. If the Taliban fails to curb cross-border militancy into Pakistan, Islamabad will likely escalate its air campaign targeting militants within Afghanistan. This could involve an increase in airstrikes targeting Kabul and other major population centres, as well as within the border provinces. In response, the Taliban may expand their counter-intelligence activity, which could involve media restrictions, increased internal security, border closures and a rise in the imposition of internet and telecommunications shutdowns to prevent the electronic surveillance of Taliban and militant leadership or to deny the interception of communications between Taliban and militant groups.

APAC Summary and Forecast

Politics, Economics and Civil Unrest:

Five killed in large-scale protests in Lahore, Pakistan.

Between 10 and 13 October, large-scale protests occurred in Lahore and nearby towns. The protests were originally called by the Islamist party Tehreek-e-Labbaik Pakistan (TLP) following the approval of the Israel-Hamas ceasefire, and were supposed to consist of a march from Lahore to Islamabad. The unrest was characterised by high levels of violence, with at least one police officer and four protesters being killed in the clashes, and dozens of vehicles and shops being torched. TLP is the fourth largest party in Pakistan and espouses ultra-conservative Islamist positions, with the explicit aim of turning Pakistan into a theocratic state. It has in the past supported several cases of violence, including attacks on minority groups' places of worship.

China carries out crackdown on "underground" church.

Over the 9-13 October period, Chinese police reportedly carried out dozens of raids in several cities, leading to the arrests of 30 pastors of the Zion Church, a Chinese Evangelical Christian movement that has around 10,000 members that are mostly concentrated in Beijing. The church is an "underground" organisation, a term that refers to religious groups that lack official approval or an official agreement with Chinese political authorities, and had previously been banned in 2018. The group, however, continued to operate despite the ban and, likely by effectively leveraging social media, actually increased its support during the COVID-19 pandemic restrictions. The timing of the crackdown follows an increase in US-



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Chinese trade tensions, including Washington and Beijing beginning to impose tit-for-tat port charges targeting each other's vessels. Zion Church's founders' family is resident in the US and comprises several US citizens.

Moderate Komeito party withdraws from Japan's ruling coalition.

Komeito representatives announced the decision on 10 October, further worsening the position of Japan's ruling Liberal Democratic Party (LDP), which is undergoing its worst crisis in decades. The decision almost certainly was a response to the appointment of Sanae Takaichi as the LDP's new leader and potentially Japan's next prime minister. Takaichi represents the LDP's right wing, and some of her positions, such as her perceived "militarism", are highly unpopular among Komeito representatives. The coalition breakup complicates Takaichi's bid for the office of prime minister and has the realistic possibility of creating an opportunity for the opposition to advance its own alternative candidate to succeed incumbent Prime Minister Shigeru Ishiba. Such a coalition would nevertheless likely be highly unstable, as it would comprise multiple parties from across the political spectrum.

Security, Armed Conflict and Terror:

Security at US Embassy in Dhaka, Bangladesh increased due to terrorist attack threat.

On 13 October, Bangladeshi security increased its presence near the US Embassy following reports of a possible terror attack planned to target the facility. Local police intelligence units reportedly obtained photographs of three "suspects", although they provided no further information on the possible nature of the planned attack and its attribution. No arrests have yet been reported. Since the collapse of the government of Sheikh Hasina in the August 2024 revolution, Bangladesh's security environment has become precarious, and the political instability has almost certainly created more opportunities for terrorist recruitment and propaganda efforts.

North Korea unveils new intercontinental ballistic missile at military parade.

Beginning late 10 October, a military parade occurred in Pyongyang, North Korea, to mark the 80th anniversary of the foundation of the ruling Workers' Party of Korea (WPK). The parade was attended by foreign dignitaries from China, Russia, and Vietnam, and was used to unveil a new intercontinental ballistic missile (ICBM) system. Named Hwasong-20, the new ICBM was described by state-run media as North Korea's "strongest" nuclear weapon system, and has been assessed to likely be capable of delivering multiple independent re-entry vehicles (MIRVs), potentially allowing North Korea to strike multiple targets simultaneously with nuclear warheads at a long range. Its unveiling is almost certainly intended by Pyongyang to serve as a deterrence against the US. The attendance of the parade by foreign dignitaries highlights North Korea's strategic relationships. On 10 October, North Korea and Vietnam reportedly signed deals to increase cooperation in multiple fields, ranging from healthcare to defence, with Vietnam's military likely keen to exploit lessons learnt from North Korea's deployment to the distinctly modern warfare theatre of Ukraine.



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President of Taiwan announces development of “T-Dome” integrated air defence system.

On 10 October, Taiwan’s President Lai Ching-te announced during a Nation Day speech that Taiwan’s air defence capabilities will be strengthened with the development of a “T-Dome” integrated air defence system. Details are sparse on the specifics of the systems or capabilities involved. The name chosen is almost certainly inspired by Israel’s “Iron Dome” and the US President Donald Trump proposed “Golden Dome”. Taiwan’s current surface-to-air missile (SAM) systems include the US-provided Patriot and domestically developed Sky Bow, in addition to man-portable air-defence systems (MANPADS) such as Stinger.

With the People’s Republic of China (PRC) having considerably developed its military capabilities in recent years, and the so-called ‘Davidson window’ which argues that the People’s Liberation Army (PLA) has been tasked with being ready for a potential invasion of Taiwan by 2027 (named after US Indo-Pacific Command Admiral Philip Davidson, who made the claim), Taipei is almost certainly heavily incentivised to enhance its air defence umbrella to be multi-layered and more capable of simultaneously intercepting both hypersonic missiles and large swarms of long-range attack drones.

Environment, Health and Miscellaneous:

7.4 and 6.8 magnitude earthquakes kill seven in the Philippines.

The earthquakes occurred on 10 October, with their epicentres off the coast of Manay in the Davao Oriental province, and resulted in brief tsunami warnings being issued in the Philippines and parts of Indonesia. The earthquakes caused severe damage to some coastal towns near the epicentre, such as Manay and Mati City, while more moderate damage to infrastructure and buildings was recorded further west. An estimated 10 people were killed and over 1,000 were injured, with economic losses currently estimated at USD 40 million, with over 1,300 aftershocks recorded as of 15 October. The earthquakes follow intense anti-corruption protests in the Philippines, which started in September and were also driven by perceived government failure to deal with the severe environmental risks affecting the country and the Philippines’ poor environmental disaster resiliency. The recent tremors have the potential to trigger further protests, especially if the government’s response is perceived as slow or inadequate.



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