

ZeroFox Intelligence Geopolitical Brief for April 2023



TLP: CLEAR

B-2023-03-30a

Executive Summary

The largest anti-government protests in France in decades have dominated the physical security landscape, and there is a strong possibility they will continue. Furthermore, the protests jeopardize the international business investment President Macron was hoping to attract through his controversial pension reform. The French protests have also distracted from similar disruptive protest activity taking place across Europe, where the European Union's (EU) largest economy, Germany, is also experiencing disruptive union-led protests; similar work stoppages are frequent in other important economies like Belgium and the Netherlands.

Some major emerging economies are also likely to experience violent protests in the coming months, led by Kenya and Israel. The latter may see some respite in April, but protests will likely resume with force after lawmakers return from break in May. The protests in both countries are unlikely to end without key concessions from the government to opposition protesters.

April and May 2023 will also see a slew of important elections that will likely influence Western support for Ukraine as well as Western policies aimed at constraining China. The two biggest elections will be in the major emerging markets of Turkey and Thailand, where incumbents are projected to lose. Thailand's military in particular has a history of overthrowing elections, which could see a return to the violent protests of 2020 and 2021. If both incumbents lose, it will impact U.S. plans to move more business from China to its ally Thailand, which has similar manufacturing and labor capabilities. Turkish President Recep Erdogan is also unlikely to accept an electoral loss, which could lead to social unrest in another large economy growing in geopolitical importance. In both cases, a win for the opposition will likely coincide with a slew of policy changes—particularly in Turkey, where the opposition will attempt to roll back years of unorthodox economic policy.

Before those elections, voters will also elect new leaders in Finland, Bulgaria, Paraguay, and Greece. Greek elections may not be decided until July but are significant in light of Greece's economic and supply chain importance as well as the rivalry with its neighbor, Turkey.

After months of relatively muted Chinese foreign policy in the face of a COVID-19 outbreak and an economic crisis, China is likely to continue its adversarial approach to U.S. efforts to constrain its economic and military growth. This presents a risk to Western business operations inside China—especially those that handle sensitive information or those that could tentatively move their operations outside of China. China will also likely use its considerable trade leverage to target the home nations of companies that comply with Western restrictions targeting China. Expect repeated developments on this front in light of the planned U.S. visit of Taiwan's leader in April, which will likely lead to a Chinese response.

Key Findings

- Snap elections in Thailand will pit the 2020–2021 protesters against the military government.
- Protests in France will continue to cause supply chain disruptions and political challenges for years and risk the potential foreign business investments the reforms were designed to attract.
- Senegal, South Africa, and Kenya will all see widespread protests that are likely to linger through 2023.
- A train crash had led to snap elections in Greece that could see a transfer of power by May 2023.
- Neighboring Turkey also holds mid-May elections.
- The April agreement between Iran and Saudi Arabia brokered by China could see improved economic prospects for Iran in the coming months and greater efforts by China to immerse themselves in geopolitical disputes.
- Efforts to remove President Lasso in Ecuador could impact business operations, as his replacement will likely target energy and mining companies.
- In Pakistan, former Prime Minister Khan and his PTI party will cause disruptions ahead of snap local elections in April before continuing with disruptive protests for the rest of 2023.
- China is likely to retaliate for a U.S. visit by Taiwanese leadership in April 2023.
- German transportation unions are likely to strike in April 2023, leading to travel and supply chain disruptions.
- Former Brazilian president Jair Bolsonaro's return could spark social unrest in April 2023, especially as legal cases proceed.

Key Threats and Developments



Key emerging markets are holding elections by May 2023.



Large protest movements are likely in some of Africa's largest economies in April 2023.



One of the few remaining pro-business leaders in LATAM could be impeached.



Japan and Korea ended decades of trade acrimony to help thwart China.



Protests in France will continue in April 2023.



The war in Ukraine will shift with the transition from Winter to Spring.



Expect social unrest in Pakistan tied to elections in April and October.



The rapprochement between Saudi Arabia and Iran could coincide with new global trade and political agreements.

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Russia-Ukraine Conflict

Russia continued its fight for the eastern city of Bakhmut throughout March; however, Western and Ukrainian intelligence officials believe that effort is now winding down amid heavy losses. Russian forces occupy about 65 percent of the city but are advancing at slow and costly rates. Ukrainian officials continue to stress holding Bakhmut is essential to denying Russia any semblance of victory.[1]

Ukrainian officials are also beginning to shift their attention to its much-discussed spring offensive. On March 29, Defense Minister Oleksii Reznikov announced the offensive will begin in April along several directions.[2] During the offensive, Ukraine will deploy the more advanced tanks and other weaponry it has acquired from Western countries over the past several months. Ukrainian and Western officials hope these weapons will allow Ukraine to make significant territorial advances. An advancing Ukraine could see Russia retaliate further against Ukrainian civilian infrastructure—and potentially against states supporting Ukraine.

Forward Look:

- Russian officials and media outlets are preparing the Russian media space for a potential Ukrainian counter-offensive.
- China is walking a fine line between supporting its partnership with Russia while avoiding Western sanctions that could harm its recovering economy. While China and Russia previously announced their “no-limits partnership” in 2022, it is now clear China will avoid supporting Russia in ways that could harm the Chinese economy.[3]
- Wagner PMC owner Yevgeny Prigozhin continues to use his influence in the Russian media to advance his own agenda. Reports of infighting between Prigozhin and the Russian military establishment continue. Additionally, some reports indicate Prigozhin may withdraw Wagner forces from Ukraine and recommit them to conflicts in Africa.

Elections in Greece, Finland, and Bulgaria

- **Finland** holds general elections on April 2, 2023.
- **Bulgaria** holds another general election on April 2, 2023. [4]
- **Greece** holds general elections on May 21, 2023.

Forward Look:

- The Social Democrats of Finnish Prime Minister Sanna Marin currently lead a center-left coalition government. However, the election is expected to be tight, and the next government could be a far-right coalition. The biggest campaign issues are joining NATO, immigration, and climate change.
- Bulgaria will hold its fifth parliamentary election in less than two years. The Bulgarian public remains deeply divided. The We Continue the Change and Democratic Bulgaria (WCC-DB) electoral coalition is in the lead, with 23.7 percent of voter support. It is likely that no government will be formed, and another election will be needed in the fall.
- In Greece, PM Kyriakos Mitsotakis' New Democracy party is ahead of the opposition left-wing Syriza party. The gap between the two parties has narrowed to four points since a train accident on February 28 that sparked social unrest. Mitsotakis wants a majority in parliament without forming a coalition, which could require two rounds of voting with the next round by early July.[5]

European Protests and Policy Updates

- **UK:** Expected air travel disruptions; rail travel could ease in April 2023[6]
- **EU:** Critical Raw Materials Act
- **Germany:** Workers strikes likely to cause supply chain disruptions in April 2023
- **UK, Northern Ireland:** Terror threat raised over sectarian attacks ahead of U.S. President Biden's visit on April 11, 2023
- **Bosnia & Herzegovina:** Severs U.S. and UK ties

Forward Look:

- Major disruptions to air travel in the UK are expected in April 2023, when both security and passport workers plan to strike. Security guards at Heathrow Airport in London's capital are planning strike action from March 31 to April 9, 2023, to coincide with Easter. Passport administrators also plan to strike from April 3–May 5, 2023.
- In the UK, some rail workers have accepted a pay agreement, while the rest have agreed to postpone strike action planned for early April. This will ease transportation disruptions, but strikes by doctors and educators will continue.
- From April 21–24, 2023, Extinction Rebellion (UK) is planning a protest in the capital of London. This is the first protest since XR abandoned its four-year policy of causing as many major travel disruptions as possible with spontaneous roadblock protests. The protest is planned for outside Parliament; despite a change in philosophy, this protest will likely cause major travel disruptions in the downtown area of London.
- UK oil workers are also planning protests over the failure of the companies they work for to pass on profits. The mass strike will include workers at North Sea oil rigs owned by BP, Harbour Energy, Total, Shell, and EnQuest. The protests will include 24, 48, and 72-hour stoppages from March 29–June 7, 2023.
- The EU Commission released its draft Critical Raw Materials Act to help secure and refine minerals needed in the energy transition. The raw materials plan is set to be followed by plans for the Net-Zero Industry Act. Both include imposing limits on imports from countries like China while unleashing subsidies and other financial incentives to ramp up production in the EU. The outcome will likely be billions in state aid to ensure businesses move to the EU or do not leave the EU for cheaper alternatives. The EU has been more aggressive when it comes to eliminating China from its trade networks, which leaves those countries still reliant on trade with China vulnerable to economic retaliation. China has threatened the Netherlands, a key player in semiconductor production, specifically for adhering to U.S. restrictions.
- At the end of March 2023, several German transportation groups went on separate strikes over pay, including port workers, airport workers, and rail workers. A quick resolution is unlikely; further strike action in April 2023 is probable, which will cause significant disruptions. Austria, Netherlands, Portugal, and Belgium will likely see disruptive strikes as well in April.
- Bosnia severed all ties with U.S. and UK embassies following the U.S. decision to sanction Dragan Stankovic, the director of the Administration for Geodetic and Property Affairs of the Republika Srpska. The entity government accused both countries of “interfering with internal affairs in Bosnia.”[7] As a result, it was forced to end cooperation with diplomats from both embassies.

FOOTNOTES

- [1] [hXXps://www.understandingwar.org/backgrounder/ukraine-conflict-updates](https://www.understandingwar.org/backgrounder/ukraine-conflict-updates)
- [2] [hXXps://meduza.io/en/news/2023/03/29/ministr-oborony-ukrainy-kontrnastuplenie-nachnetsya-v-aprele-mae](https://meduza.io/en/news/2023/03/29/ministr-oborony-ukrainy-kontrnastuplenie-nachnetsya-v-aprele-mae)
- [3] [hXXps://www.nytimes.com/2023/03/21/world/europe/xi-putin-russia.html](https://www.nytimes.com/2023/03/21/world/europe/xi-putin-russia.html)
- [4] [hXXps://www.bta.bg/en/news/bulgaria/432612-market-links-poll-five-parties-likely-to-enter-next-parliament](https://www.bta.bg/en/news/bulgaria/432612-market-links-poll-five-parties-likely-to-enter-next-parliament)
- [5] [hXXps://www.politico.eu/article/greece-hold-national-election-may-21-2023/](https://www.politico.eu/article/greece-hold-national-election-may-21-2023/)
- [6] [hXXps://www.euronews.com/green/2023/03/21/the-big-one-why-are-extinction-rebellion-ngos-and-nhs-workers-gathering-outside-uk-parliament](https://www.euronews.com/green/2023/03/21/the-big-one-why-are-extinction-rebellion-ngos-and-nhs-workers-gathering-outside-uk-parliament)
- [7] [hXXps://balkaninsight.com/2023/03/24/bosnian-serb-govt-ends-cooperation-with-uk-us-embassies/](https://balkaninsight.com/2023/03/24/bosnian-serb-govt-ends-cooperation-with-uk-us-embassies/)



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Ecuador Political and Security Challenges

- Members of Congress are progressing with their efforts to impeach president Guillermo Lasso, which will likely lead to new elections instead.
- In the event Lasso remains in office he will likely be ineffective; if he is removed, the international business community would lose one of its few allies in the LATAM region.[8]
- Crime has skyrocketed since 2021 due to the increasing presence of drug-trafficking gangs.

> Forward Look:

- Lasso won the 2019 elections without party backing; therefore, he has little support from Congress to block impeachment. The constitution does permit leaders to dissolve the assembly and call new elections for assembly and president.
- Lasso is a conservative and pro-business candidate, but his replacement will likely be leftist or an indigenous leader. A leftist government will make it more difficult for foreign mining and energy companies—two of Ecuador's main exports—to operate. An indigenous leader will also likely prioritize environmental regulations on the sectors.
- Ecuador has rapidly risen to become one of the region's least safe countries; the traditional transit country for drugs from Colombia and Peru has become a battleground for cartel turf wars, including those from Mexico.

French Pension Reform Protests

- On March 16, 2023, President Emmanuel Macron invoked Article 49.3 of the Constitution to push through a pension reform raising the official retirement age from 62 years to 64 without putting it to a vote in the National Assembly. On March 20, 2023, his government survived two no-confidence motions filed by opposition groups.[9] Before being signed into law by the president, the proposed reform still needs to be approved by the Constitutional Council within a month.
- The government's decision to invoke Article 49.3 sparked several more rounds of nationwide strikes, with the latest occurring on March 28, 2023. The recent protests have witnessed greater levels of property damage as well as an increase in violent clashes with police.[10]
- The labor action against the pension reform has also affected France's energy sector, with sporadic strikes and work stoppages hitting a number of the country's major refineries and largest ports. Consequently, an estimated 16 percent of French fuel stations lacked at least one type of fuel as of March 27, 2023.[11] Raising the retirement age is part of a slew of reforms Macron wants to enact to attract foreign investment, but the animus to the reforms could see more businesses avoid France.
- Expect protests to continue, especially while the possibility to get the reforms cancelled still exists.

> Forward Look:

- The proposed change to the retirement system remains deeply unpopular, and it is likely that France will experience more countrywide strikes and demonstrations in April. Labor actions at refineries and ports will continue to cause supply chain disruptions.
- Even though this reform successfully passed in the legislature, France's major labor unions and activist groups have vowed to continue the fight, citing successful past actions. For instance, in 2006, nationwide protests forced Prime Minister Dominique de Villepin to revoke new labor rules that had already been written into law.[12]

Latin American Political Updates

- **Venezuela:** Crackdown against key government officials continues in April 2023
- **Colombia:** End of ceasefire with major criminal group in April 2023
- **Peru:** Most state of emergencies lifted as protests ease but could resume over presidential impeachment attempt starting March 30
- **Brasilia, Brazil:** Possible security issues when former President Bolsonaro returns on March 30, 2023

> Forward Look:

- At least 20 people have been arrested in a key anti-corruption drive linked to state-owned oil company Petroleos de Venezuela (PDVSA), Venezuela's primary economic driver. Former petroleum minister Tareck El Aissami, a longtime ally of President Nicolas Maduro, resigned following allegations he may have been plotting to overthrow Maduro, and most of the subsequent arrests have been of officials linked to Aissami. Venezuela next holds elections in 2024, which Maduro is expected to win. There are also on-and-off peace talks between Maduro and opposition figures that also include potentially removing PDVSA from international sanctions. Aissami's removal could be linked to the peace talks, with U.S. officials possibly tying it to permitting more Venezuelan oil on the international market, or part of a failed effort to remove Maduro from the political equation. Expect further arrests.
- Colombian President Gustavo Petro announced a brief ceasefire with the Gulf Clan is over. The resumption of military activity against the group could see a resumption of violent attacks on security forces. The Gulf Clan holds territory in some of Colombia's largest cities. The Gulf Clan's left-wing rival, the National Liberation Army (ELN), has also escalated violent activity against the government to advance its own peace talks.
- As protests have eased, Peru has lifted the state of emergency for the capital, Lima, that was supposed to expire in June 2023. This should ease supply chains for minerals and agriculture. However, there are now impeachment proceedings against President Dina Boluarte, which could see protests resurface.

Paraguay Elections

- Unpredictable general elections on April 30, 2023
- Credible corruption allegations against the dominant Colorado party could see an outsider candidate win

> Forward Look:

- On April 30, 2023, Paraguay holds general elections to determine the next president, vice-president, 80 members of the chambers of deputy, 50 senators, governors, and assemblymen.
- Current President Mario Abdo Benitez cannot run for reelection, and Santiago Pena will be the ruling Colorado Party's candidate. Several party leaders have been sanctioned by the United States over organized crime allegations, which have dented their chances. Nevertheless, there are no leftist candidates. Corruption and security are the top-ranking campaign issues. Paraguay's relationship with Taiwan and possibly switching recognition to China is also a campaign issue. Efraim Alegre, a centrist of the Concentracin Party, is the main opposition candidate, while Paraguayo Cubas is a right-wing outsider candidate with a small chance of winning. Alegre is marginally ahead of Pena in polling, but winning lower elections will be crucial to passing reforms.

FOOTNOTES

- [8] <https://gestion.pe/economia/peores-bonos-emergentes-suben-ante-estancamiento-juicio-politico-ecuador-guillermo-lasso-noticia/>
- [9] <https://www.nouvelobs.com/politique/20230320.OBS71131/la-motion-de-censure-echoue-a-9-voix-pres-le-gouvernement-reste-en-place.html>
- [10] <https://www.leparisien.fr/politique/retraites-le-conseil-de-leurope-salarie-dun-usage-excessif-de-la-force-en-france-24-03-2023-AJL75ZQNM5A53KX7KUKK2RQENM.php>
- [11] <https://www.bloomberg.com/news/articles/2023-03-27/french-refineries-are-barely-running-as-strikes-enter-week-four#xj4y7vzkq>
- [12] <https://www.economist.com/leaders/2023/03/23/the-trouble-with-emmanuel-macrons-pension-victory>



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Tunisia Protests

- Demonstrations likely to affect Tunisia nationwide in April 2023
- Tunisia's economy on verge of default; efforts to negotiate with the World Bank and International Monetary Fund (IMF) complicated by domestic politics and risk of social unrest

Forward Look:

- Several opposition protests occurred in March 2023 in Tunisia, and the risk for further action remains high. For example, on March 20, thousands of demonstrators gathered in central Tunis, the capital, to oppose President Kais Saïed's recent political actions and mass arrests targeting opposition members. Martyr's Day, which commemorates Tunisians' historical struggles against the French, will take place on April 9. Disruptive actions frequently occur during this holiday. Protests can materialize spontaneously and are likely to occur near government buildings or significant areas, such as Habib Bourguiba Avenue in central Tunis. Additionally, recent water cuts amid a severe drought in Tunisia have the potential to spark further actions, which may turn violent with little to no notice. [13]

African Political Developments

- **Kenya:** Bi-weekly opposition protests in April 2023
- **South Africa:** Opposition supporters could resurface demanding resignation of President Cyril Ramaphosa
- **Senegalese:** Opposition protests in favor of leader Ousmane Sonko to continue
- **Nigeria:** Continued election-related social unrest likely in April 2023

Forward Look:

- Kenyan opposition leader Raila Odinga called for nationwide demonstrations to continue in major cities every Monday and Thursday to oppose high costs of living, despite a ban on the planned protests. On March 27, police officers fired tear gas and water cannons to disperse thousands of demonstrators in the capital of Nairobi. Expect further violent protests, government restrictions, and a heightened security presence during the scheduled demonstrations—particularly in the capital, Nairobi, and the Odinga heartland of Kisumu. [14]
- On March 20, 2022, the leader of the South African Economic Freedom Fighters organized a nationwide protest calling for the resignation of President Cyril Ramaphosa. Demonstrators gathered in multiple cities, including at Ramaphosa's official residence in Pretoria, while nearly 3,500 security personnel were deployed nationwide. Similar violent protests could become widespread as the energy and economic crisis worsens ahead of elections in 2024. [15]
- Senegal's opposition announced that it will continue protests against what it describes as the politically-motivated prosecution of its leader, Ousmane Sonko. If convicted on the defamation charges brought against him, Sonko would be ineligible to run for president in 2024, likely guaranteeing a third victory for incumbent Macky Sall. [16]
- Social unrest linked to two recent contested nationwide elections in Nigeria is likely to continue. President-elect Tinubu will inherit a struggling economy and security situation with only a small percent of national support.
- Unrest in so many of Africa's most economically-developed countries will harm ease of business.

China

- **Taiwan's** president to visit United States and Central America in April 2023, likely leading to retaliation
- Further **Chinese** retaliation against Western multinationals likely in April 2023

Forward Look:

- On March 29, 2023, Taiwan President Tsai Ing-wen will start a week-long visit to Central America to shore up alliances. The visit to Belize and Guatemala, which both recognize Taiwan, will also include a stop in the United States. The latter visit has angered mainland China, which refuses to acknowledge Taiwan's sovereignty. Military exercises that disrupt supply chains are possible, as are cyberattacks. Tsai has agreed to meet U.S. House Speaker Kevin McCarthy on April 7 before heading back to Taiwan. Taiwan has lost recognition in a number of South American countries in recent years, and Honduras announced last week that it had reopened relations with mainland China. China has used its economic power to convince smaller Central American nations in particular to switch recognitions.
- China has threatened the trading relationship of countries that comply with U.S. restrictions on technology trade with China. China is also likely to restrict the operations of Western multinationals inside China apart from financial and certain tech companies. Companies with Chinese data are the most at risk, as are those who attempt to move capital from the country.

Thailand Elections

- Thailand holds general elections on May 14, 2023.
- Campaigning will begin after candidate declarations from April 4-7. [17]
- Incumbent PM Prayuth Chan-ocha trails opposition leader Paetongtarn Shinawatra.
- The large protest movement of 2020-2021 is likely to re-emerge, which could see a military crackdown.

Forward Look:

- On May 14, 2023, Thailand will hold general elections to determine the 500 members of the lower house as well as the prime minister. Thailand experienced four waves of anti-government protests from 2020 to 2021 linked to the anti-democratic policies of Prime Minister Prayuth Chan-ocha, who came to power in a coup years earlier. Prayuth Chan-ocha is trailing in the polls behind Paetongtarn Shinawatra of the opposition Pheu Thai Party (PTP). Thailand's military has a historically played a role in politics and has overturned or staged coups when they feel their influence has been diminished. That could again occur after this election.
- The 2020-2021 pro-democracy protest movement calling for the end of the monarchy and a reduced political role for the military is likely to resurface, possibly accompanied by a return of a military crackdown on protests. Protests will likely be largest in the capital Bangkok but are also expected to be sizeable in other urban centers like Chiangmai, Nakhon Ratchasima, and Nakhon Si Thammarat.

FOOTNOTES

[13] <https://aawsat.com/home/article/4239441/>

[14] <https://www.reuters.com/world/africa/kenyan-opposition-leader-odinga-says-protests-despite-police-ban-2023-03-27/>

[15] <https://www.africanews.com/2023/03/20/s-africa-hundreds-march-to-presidential-residence-to-demand-ramaphosa-resignation/>

[16] <https://www.france24.com/fr/vid%C3%A9o/20230329-manifestations-de-soutien-%C3%A0-ousmane-sonko-forte-tension-politique-au-s%C3%A9n%C3%A9gal>

[17] <https://thediplomat.com/2023/03/from-the-streets-to-the-ballot-box-ex-student-protesters-prepare-for-thailands-election/>



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Asia-Pacific Updates

- **South Korea** and **Japan** restore trade status
- **Japan:** Unified local elections and by-elections for House of Representatives to begin on April 9 and 23, 2023
- **Pakistan:** Campaign protests ahead of elections on April 30, 2023
- **India:** Opposition parties announce nationwide protest campaign through April due to opposition leader's expulsion from Parliament
- **India:** Manhunt for Sikh nationalist preacher stretches into April

Forward Look:

- Japan announced it is lifting its export restrictions to South Korea on three key semiconductor production materials, including fluorine polyimide, photoresist, and hydrogen fluoride. Japan produces about 90 percent of the global supply of fluorine polyimide and photoresist and around 70 percent of hydrogen fluoride.^[18]
- Establishing trade between Japan and South Korea will help Western aims to increase partnerships that hinder China's influence as a major supplier for semiconductor, energy, and components for electric vehicles (EV).
- Members of the Pakistan Tehreek-e-Insaf (PTI) party of former Prime Minister Imran Khan will likely escalate protests and campaign events ahead of important provincial elections as a show of support for Khan regarding legal cases pending against him.^[19] Khan was removed from power in April 2022, and since then he has been leading disruptive protests and using his political popularity to force provincial elections. The PTI has successfully dissolved parliament in the provinces of Khyber Pakhtunkhwa and Punjab, with new elections scheduled for April 30. Khan's protest activity and actions as Prime Minister have also resulted in legal cases against him, and his supporters prevented police from arresting him in a violent standoff; Khan was even shot at one of his rallies after the arrest warrants were issued in late 2022. Expect campaign-related disruptions in April 2023 to continue, as Khan is pushing for early general elections as well. However, his push could see the mandatory elections scheduled for before the end of 2023 pushed back on security grounds.
- Indian opposition groups will likely hold multiple protests throughout April denouncing the government of Prime Minister Narendra Modi.
- The manhunt for the Sikh separatist in India has seen mobile internet services suspended for the entire northern state of Punjab. Similar deliberate internet blackouts are common for political and security reasons across India. While they tend to avoid the major tech and foreign investment centers, they do impact operations—particularly around the capital, Delhi, where internet outages are common.^[20]

Israel Protests

- Anti-government protests and public sector strikes reached their peak on March 26, 2023, after Prime Minister Benjamin Netanyahu announced the firing of his defense minister, Yoav Gallant, over his opposition to the controversial judicial overhaul. In response to this escalating pressure, Netanyahu declared a halt to the reforms until after the Knesset's passover break, which is scheduled to last from April 2–30, 2023.
- The attempted reform package has left the government on shaky ground. More moderate members of the coalition such as Gallant have urged Netanyahu to either delay or abandon the effort, while those on the far right, like Minister of National Security Itamar Ben-Gvir, reportedly warned they may quit their posts if the reforms are not pushed through. ^[21]

Forward Look:

- In light of Prime Minister Netanyahu's concession, unrest will likely decrease during the April recess. However, it is not clear what form the overhaul will take when the assembly resumes work, leaving the potential for protests to resume in force if the package is not meaningfully modified.
- If Netanyahu is unable to appease protesters against the reforms and the coalition members supporting it, the government risks collapse in the spring; polls show that opposition parties would gain a majority in a new election.
- The unrest has already harmed the economy; if it continues, it will likely coincide with multinationals exiting the country.

Saudi-Iran Diplomatic Agreement

- Saudi Arabia and Iran have announced an agreement to re-establish diplomatic relations after seven years. The agreement, mediated by China, includes the restoration of security and economic agreements that existed between the two nations prior to their severing of relations. Saudi Arabia closed its embassy in Tehran in 2016 after it was stormed by a crowd of Iranian civilians angry at the Kingdom's execution of a Shi'ite imam. Since then, there have been occasional security threats particularly against Saudi oil infrastructure and Iranian assets at sea. ^[22]
- The role of China suggests it is looking for more alliances to counter Western trade restrictions.

Forward Look:

- Saudi Arabia and Iran are the two dominant powers in the Middle East, and their relationship was rocky even before relations were severed. Re-establishing diplomacy will not make their longstanding disagreements disappear, but it will likely facilitate findings solutions to those disagreements.
- Saudi Arabia may take the opportunity to cease its involvement in Yemen's civil war, where the Iran-backed Houthi militia has targeted Saudi assets in cross-border attacks.
- Iran plans to pursue further regional rapprochement with other Arab countries—likely in part to curb the influence of Israel, which has made diplomatic inroads with its historically hostile neighbors. Expect more economic agreements, particularly for Iran, to emerge.

FOOTNOTES

[18] [hXXps://www.koreatimes\[.\]co\[.\]kr/www/tech/2023/03/419_347620.html](https://www.koreatimes[.]co[.]kr/www/tech/2023/03/419_347620.html)

[19] [hXXps://www.nation\[.\]com\[.\]pk/23-Mar-2023/govt-allows-pti-rally-at-minar-i-pakistan-on-25th](https://www.nation[.]com[.]pk/23-Mar-2023/govt-allows-pti-rally-at-minar-i-pakistan-on-25th)

[20] [hXXps://www.deccanherald\[.\]com/international/world-news-politics/security-heightened-around-indian-high-commission-in-london-over-protest-by-british-sikh-groups-1202584.html](https://www.deccanherald[.]com/international/world-news-politics/security-heightened-around-indian-high-commission-in-london-over-protest-by-british-sikh-groups-1202584.html)

[21] [hXXps://www.timesofisrael\[.\]com/liveblog_entry/ben-gvir-mulls-quitting-the-government-if-overhaul-halted-may-back-it-from-outside/](https://www.timesofisrael[.]com/liveblog_entry/ben-gvir-mulls-quitting-the-government-if-overhaul-halted-may-back-it-from-outside/)

[22] [hXXps://www.middleeasteye\[.\]net/opinion/syria-china-key-peace-could](https://www.middleeasteye[.]net/opinion/syria-china-key-peace-could)



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Turkey Election

Turkey's next national election will take place on May 14, with longtime President Recep Tayyip Erdogan seeking re-election. Turkey's normally fragmented opposition parties have unified under a single challenger, Kemal Kilicdaroglu, who is the leader of the main opposition CHP party. In a show of tacit support for the opposition, the pro-Kurdish HDP party has chosen not to field its own candidate.[23] Campaigning has not yet begun, though polls show Kilicdaroglu with a slight lead. Concern has grown in Turkey over President Erdogan's increasing authoritarian tendencies—which could see him challenge an election he loses—and handling of the economy. Kilicdaroglu has promised to undo many of Erdogan's policies.

Forward Look:

- There is no clear frontrunner at this time, and both sides are sure to undertake extensive campaigning ahead of the election.
- A victory by Erdogan would allow him to continue pursuing a muscular foreign policy that seeks to cement Turkey as a regional center for trade and diplomacy. A wide margin of victory will likely grant him a mandate to continue his economic program, which involves cutting interest rates despite high inflation. A narrow margin may convince him to abandon these efforts in favor of a more orthodox approach. Finally, Erdogan would likely continue attempts to centralize power in the presidency at the expense of Turkey's parliament.
- Kilicdaroglu has promised to roll back Erdogan's policies that have weakened parliament and silenced critics. He has also promised to take a more traditional approach to the economy. Kilicdaroglu's foreign policy goals are less clear but may involve greater engagement with the West and fewer efforts to transform Turkey into a regional military power.[24]
- Voters will also select Turkey's next Parliament, with President Erdogan's AKP party seeking to retain its majority.
- Erdogan ordered a re-vote of mayoral elections in the capital of Istanbul in 2019 after his candidate lost.

ABOUT ZEROFOX

ZeroFox (Nasdaq: ZFOX), an enterprise software-as-a-service leader in external cybersecurity, has redefined security outside the corporate perimeter on the internet, where businesses operate and threat actors thrive. The ZeroFox platform combines advanced AI analytics, digital risk and privacy protection, full-spectrum threat intelligence, and a robust portfolio of breach, incident, and takedown response capabilities to expose and disrupt phishing and fraud campaigns, botnet exposures, credential theft, impersonations, data breaches, and physical threats that target your brands, domains, people, and assets. Join thousands of customers—including some of the largest public-sector organizations as well as finance, media, technology, and retail companies—to stay ahead of adversaries and address the entire lifecycle of external cyber risks.

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Cyber Updates

- Large-scale cyberattack against East Asian websites
- Iran-linked hackers impersonating U.S. think tank to scam targets
- China-linked APT Sharp Panda targets government entities in Southeast Asia[25]
- Brazil: Hackers target infrastructure, energy, and transport company
- India: HDFC Bank suffers alleged hack; customer data exposed
- Spain: Hospital in Barcelona targeted by ransomware
- North Korea: APTs target U.S., South Korean, and Japanese IT companies
- China: Cyberspace watchdog increases internet regulation
- Australia: Latitude Financial breach affects 7.9 million customers[26]

APPENDIX: Traffic Light Protocol for Information Dissemination

TLP:RED

HOW IT IS USED

Sources may use **TLP:RED** when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.

HOW IT IS SHARED

Recipients may NOT share **TLP:RED** with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.

TLP:AMBER

HOW IT IS USED

Sources may use **TLP:AMBER** when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.

HOW IT IS SHARED

Recipients may ONLY share **TLP:AMBER** information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm.

Note that
TLP:AMBER+STRICT restricts sharing to the organization only.

TLP:GREEN

HOW IT IS USED

Sources may use **TLP:GREEN** when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.

HOW IT IS SHARED

Recipients may share **TLP:GREEN** information with peers and partner organizations within their sector or community but not via publicly accessible channels.

TLP:CLEAR

HOW IT IS USED

Sources may use **TLP:CLEAR** when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.

HOW IT IS SHARED

Recipients may share **TLP:CLEAR** information without restriction, subject to copyright controls.

FOOTNOTES

[23] <https://www.reuters.com/world/middle-east/vote-setback-erdogan-turkeys-hdp-will-not-field-candidate-2023-03-22/>

[24] <https://www.middleeasteye.net/news/turkey-elections-kemal-kilicdaroglu-man-charged-removing-erdogan>

[25] <https://thehackernews.com/2023/03/sharp-panda-using-new-soul-framework.html>

[26] <https://www.abc.net.au/news/2023-03-27/latitude-far-worse-cyberhacking-almost-8-million-people/102141364>

