



# | Assessment |

## Monthly Geopolitical Report: October 2025

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## Scope Note

*ZeroFox Intelligence is derived from a variety of sources, including—but not limited to—curated open-source accesses, vetted social media, proprietary data sources, and direct access to threat actors and groups through covert communication channels. Information relied upon to complete any report cannot always be independently verified. As such, ZeroFox applies rigorous analytic standards and tradecraft in accordance with best practices and includes caveat language and source citations to clearly identify the veracity of our Intelligence reporting and substantiate our assessments and recommendations. All sources used in this particular Intelligence product were identified prior to 12:15 PM (EDT) on September 30, 2025; per cyber hygiene best practices, caution is advised when clicking on any third-party links.<sup>1</sup>*

# Assessment | Monthly Geopolitical Report: October 2025

## Key Findings

- Although Israeli Prime Minister Benjamin Netanyahu accepted a U.S.-backed, 20-point plan for ending the Israel-Hamas war, it remains unlikely that this development will lead to an end to the fighting in the near term.
- Russia's military activities in Ukraine will likely continue spilling over into NATO territory. Therefore, European leaders are increasingly discussing seizing Russian assets and more direct military engagement against Russia, which has threatened all-out war if they do so.
- Following Indonesia's protests and Nepal's "Generation Z" (Gen Z) uprising, protest movements around the world have aligned with these causes. Madagascar's government has since fallen, and further bouts of Gen Z protests are very likely across the globe.
- U.S. President Donald Trump confirmed that he and Chinese President Xi Jinping will meet on the sidelines of the 2025 Asia-Pacific Economic Cooperation (APEC) Economic Leaders' Meeting at the end of October. Some breakthroughs on bilateral issues like tariffs and TikTok are likely, but a complete resolution to trade issues is very unlikely. Elements from China's 2026-2030 Five-Year Plan released in October are more likely to dictate relations between the two countries.
- Key emerging markets in Latin America and Africa are due to hold elections in October.

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<sup>1</sup> Report Purpose: The purpose of this report is to provide monthly updates on significant geopolitical occurrences and logistics developments, as well as potential impacts to the global supply chain.



## | Europe

### Increasing Violations of NATO Air Space Threaten Wider War

Russia's military activities in Ukraine increasingly spilled over into NATO territory throughout September. Over the past several weeks, NATO allies have reported an increase in Russian violations of their airspace, as well as suspicious Russian flight patterns in international territory close to Allied states. The majority of these incidents took place in the Baltic region. The airspace violations likely serve as reconnaissance missions (probing NATO defenses) and signal the possibility of direct conflict with Russia.

- **NATO Response:** NATO held emergency consultations under Article 4 twice in September and began work to integrate NATO air and ground defenses in eastern states that border Russia. European leaders have also increasingly discussed seizing Russian assets and possibly directing military support to Ukraine.
- **Russian Response:** Russian leaders have denied responsibility for any airspace violations and have warned NATO that asset seizures or direct military aid to Ukraine would constitute an act of war.

Meanwhile, developments on the Ukrainian battlefield continued to follow trends previously observed throughout the summer. Russian troops made modest advances, largely in Donetsk Oblast, while Ukraine continued its strikes on Russian energy targets.<sup>2</sup> As a result of Ukraine's strike campaign, fuel shortages have expanded further throughout Russia and are now affecting Moscow.<sup>3</sup> The sustained reduction in refining capacity prompted Russian Deputy Prime Minister Alexander Novak to announce Russia will extend its export ban on gasoline until the end of the year (the export ban was previously set to expire on September 30). Additionally, Novak said Russia would introduce a ban on non-producers exporting diesel until the end of the year.<sup>4</sup>

## | Americas

### Argentina: October Midterm Vote Marks Turning Point for Milei Coalition

Argentina will hold midterm elections on October 26, 2025—a key moment for President Javier Milei's government. Milei's administration is coming off a considerable defeat in the local elections in Buenos Aires on September 7, 2025, against the Fuerza Patria opposition coalition led by former President Cristina Kirchner and rising political figure Axel Kicillof.

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<sup>2</sup> [hXXps://deepstatemap\[.\]live/en#6/49.4383200/32.0526800](https://deepstatemap[.]live/en#6/49.4383200/32.0526800)

<sup>3</sup> [hXXps://x\[.\]com/delfoo/status/1972254174432882862](https://x[.]com/delfoo/status/1972254174432882862)

<sup>4</sup> [hXXps://tass\[.\]ru/ekonomika/25159143](https://tass[.]ru/ekonomika/25159143)



According to a recent poll, Milei's governing coalition is still projected to win the midterm vote; however, ratings for the opposition have grown considerably since July 2025, indicating the vote may be close.<sup>5</sup> Milei's approval has been impacted recently by disenchantment with his economic reform agenda and an alleged high-profile bribery case involving his sister, Karina Milei. After the administration's defeat in the Buenos Aires elections, the peso currency fell sharply. This necessitated the announcement of a financial support package by U.S. Treasury Secretary Scott Bessent and a temporary tax break on grain exports in order to secure dollar inflows to stabilize Argentina's currency.<sup>6</sup>

- **A positive midterm result:** If Milei's coalition, La Libertad Avanza, performs well in the midterm vote, he is likely to receive needed congressional support in the latter half of his tenure. This would allow Milei to continue pushing forward a libertarian economic reform agenda predicated on continued U.S. financial support that will very likely nurture investor confidence and act as a lifeline for the unstable Argentine economy.
- **A negative midterm result:** Milei's administration has contended with limited congressional support since his election in 2023. The governing coalition has shown the ability to maneuver with little congressional support by leveraging presidential executive powers; hence, a poor result may not intrinsically hinder the government's ability to continue pushing its economic reform agenda. However, it is probable another election defeat will diminish popular approval and investor confidence in Milei's ability to hold effective power. There is a roughly even chance a major midterm defeat will discourage the United States from pouring resources into Argentina if it signals that the Fuerza Patria coalition, led by Axel Kiciloff, may win the upcoming 2027 presidential election. Added turmoil following the election is expected to impact the value of Argentina's assets and currency, leading to inflation and increased resentment against Milei's government. This scenario would likely enable an emboldened opposition to draw compromises from Milei's government, slowing libertarian economic reforms.

## **Bolivia: Two-Decade Dominance by Leading Party Set to End with New President**

The second round of Bolivia's presidential election marks the end of the political dominance seen under "Movement towards Socialism" (MAS), led by current President Luis Arce. MAS has been weakened by internal strife between the incumbent and Evo Morales, the former president and a key figure in Bolivia's MAS movement. Arce's plummeting popularity and a high-profile legal case

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<sup>5</sup>

<sup>5</sup> <https://www.bloomberg.com/news/articles/2025-09-17/argentina-midterm-elections-milei-s-disapproval-rating-hits-new-high>

<sup>6</sup> <https://www.reuters.com/world/americas/argentine-assets-rally-bessent-details-strong-us-support-2025-09-24/>





against Morales have likely led Bolivian voters towards selecting more right-leaning political candidates.

The leading figures in the runoff are Rodrigo Paz, leader of the center-right Christian Democratic Party (PDC), and Jorge Quiroga, former President and leader of the conservative Libre Alliance party. Paz won the first round with 32 percent of the votes, while Quiroga received roughly 27 percent.<sup>7</sup> However, according to a recent poll, Quiroga appears to be leading in this second round with an eight-point advantage over Paz.<sup>8</sup> This approval shift appears to be linked to the belief that Quiroga is better-equipped to resolve the current economic crisis in Bolivia. Inflation surged above 14 percent this year, and the country's real GDP growth continued to decline, with persisting dollar and fuel shortages. The presidential runoff also offers two distinct strategies for Bolivia's untapped lithium reserves.<sup>9</sup>

- **A Quiroga victory:** A presidential win by former President Quiroga would likely see Bolivia focus on market reforms based on rapid liberalization and looser state control, fiscal austerity, and a move away from deeply embedded MAS policies; this will likely lead to unrest and protests linked to MAS supporters, who will still remain a political force with considerable popularity. A Quiroga victory will likely improve lithium trade relations with the United States, which will likely view Quiroga as an ideological ally in Latin America.
- **A Paz victory:** A win by Paz will likely see a more moderate reform approach focused on anti-corruption, gradual fiscal consolidation, decentralization, and a focus on socio-economic stability. Paz offers a cautious roadmap towards modernizing Bolivia's lithium industry.<sup>10</sup> He will likely uphold Bolivia's lithium trade agreements with China and Russia to prevent major shifts in the industry.

## Tariff Uncertainty Likely to Return in October and November

For the first time since early August, U.S. President Donald Trump announced new tariffs on pharmaceuticals, furniture, and commercial trucks, reigniting tariff uncertainty. It is unclear how applicable the tariffs will be. The pharmaceuticals tariffs contain so many exemptions that they amount to a reprieve on the sector rather than any actual additional costs. Moreover, further tariffs on U.S. imports are expected in the coming weeks, including for semiconductors and critical minerals. Meanwhile, the U.S. Commerce Department has announced investigations that are likely to lead to new tariffs on robotics, industrial machinery, and medical devices. Lastly, there is a

<sup>7</sup> [hXXps://cnnespanol.cnn\[.\]com/latinoamerica/live-news/elecciones-bolivia-primera-vuelta-2025-orix](https://cnnespanol.cnn.com/latinoamerica/live-news/elecciones-bolivia-primera-vuelta-2025-orix)

<sup>8</sup> [hXXps://infobae\[.\]com/america/america-latina/2025/09/26/jorge-quiroga-lidera-la-preferencia-electoral-a-menos-de-un-mes-del-balotaje-de-bolivia/](https://infobae.com/america/america-latina/2025/09/26/jorge-quiroga-lidera-la-preferencia-electoral-a-menos-de-un-mes-del-balotaje-de-bolivia/)

<sup>9</sup> [hXXps://mining\[.\]com/web/untapped-lithium-riches-are-in-crosshairs-of-bolivian-candidate/](https://mining.com/web/untapped-lithium-riches-are-in-crosshairs-of-bolivian-candidate/)

<sup>10</sup> [hXXps://lansinginstitute\[.\]org/2025/09/29/bolivias-presidential-runoff-oct-19-2025-stakes-scenarios-and-signals/](https://lansinginstitute.org/2025/09/29/bolivias-presidential-runoff-oct-19-2025-stakes-scenarios-and-signals/)



roughly even chance the U.S. Supreme Court will declare the country-specific tariffs first imposed in April and then suspended only to be reimposed in August illegal. If that is the Court's ruling, expect additional tariff uncertainty, as national security probes into critical imports will likely escalate to compensate for the end of country-specific tariff rates.

- **National Security Tariffs:** Instituting tariffs on national security grounds after a period of review is likely to lessen the chances they will be declared illegal. Country-specific tariffs, which have already been declared illegal by the lower courts, will remain in force subject to a Supreme Court appeal. On the other hand, U.S. courts have ruled that national security tariffs in place since April on automobiles, copper, steel, and aluminum are legal.

## **Middle East**

### **Israel: Ceasefire Unlikely Despite U.S.-Israel Agreement**

On September 9, 2025, several missiles launched from Israel Defense Forces (IDF) jet fighters struck a building in the Legtaifiya area of Doha, Qatar.<sup>11,12</sup> The target was a meeting of senior Hamas officials and negotiators, who were reportedly in the process of discussing a proposal to reach a ceasefire in the Gaza Strip. Although the senior Hamas figures survived the strike, six people were killed, including lower-level Hamas members and one Qatari security official.<sup>13</sup>

The attack, which was undertaken without sign-off from the Trump administration, was widely condemned by the international community. An emergency summit of Arab and Islamic leaders was held on September 15, 2025, to discuss the issue. However, the member states only issued a strongly worded condemnation of the strike.<sup>14</sup>

Meanwhile, Israel has continued its military operations in Gaza City (Operation Gideon's Chariots II). On September 16, 2025, Israel launched a large ground offensive against the city, as hundreds of thousands fled the area.<sup>15</sup> On September 23, 2025, local reports indicated that the Israeli military completed its encirclement of the municipality.<sup>16</sup>

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<sup>11</sup> [hXXps://dohanews\[.\]co/israel-targets-hamas-negotiators-in-doha-live-blog/](https://dohanews[.]co/israel-targets-hamas-negotiators-in-doha-live-blog/)

<sup>12</sup>

[hXXps://www.wsj\[.\]com/world/middle-east/how-israels-audacious-qatar-strike-left-trump-little-time-to-object-c-2369608](https://www.wsj[.]com/world/middle-east/how-israels-audacious-qatar-strike-left-trump-little-time-to-object-c-2369608)

<sup>13</sup>

[hXXps://www.timesofisrael\[.\]com/senior-hamas-official-makes-first-appearance-since-surviving-israeli-strike-in-qatar/](https://www.timesofisrael[.]com/senior-hamas-official-makes-first-appearance-since-surviving-israeli-strike-in-qatar/)

<sup>14</sup> [hXXps://www.aljazeera\[.\]com/news/2025/9/16/qatar-hosts-arab-islamic-emergency-summit-who-said-what](https://www.aljazeera[.]com/news/2025/9/16/qatar-hosts-arab-islamic-emergency-summit-who-said-what)

<sup>15</sup> [hXXps://www.washingtonpost\[.\]com/world/2025/09/16/israel-gaza-city-ground-invasion/](https://www.washingtonpost[.]com/world/2025/09/16/israel-gaza-city-ground-invasion/)

<sup>16</sup> [hXXps://www.jpost\[.\]com/israel-news/defense-news/article-868420](https://www.jpost[.]com/israel-news/defense-news/article-868420)



- **Looking Forward:** Although Israel's attack on Qatar was politically and militarily unsuccessful, Benjamin Netanyahu's government is unlikely to face any significant consequences. Countries in the region very likely do not want to risk antagonizing Israel and have little military or economic leverage. At the same time, reports indicate that, although President Trump is frustrated with Netanyahu, he remains loath to publicly break with the Israeli government.<sup>17</sup>
- **Gaza:** Moreover, international diplomatic efforts to put pressure on Israel, such as the recent recognition of a Palestinian state by the United Kingdom, Canada, Australia, and France, are largely symbolic and are highly unlikely to have any impact on the situation in Gaza or likelihood of an eventual two-state solution. The European Union is also unlikely to impose sanctions against Israel due to disagreement in the bloc (in particular, opposition from Germany, Austria, Italy, and Hungary).<sup>1819</sup>
  - While the offensive in the Gaza Strip has been painted by senior Israeli political figures as decisive, this is highly unlikely to be accurate. Hamas does not seek to take and hold territory in the enclave; rather, it now operates primarily as a guerilla organization that is still able to recruit thousands of fighters.<sup>2021</sup> Even a successful Israeli operation in Gaza City is highly unlikely to lead to Hamas' destruction.
  - Although Netanyahu accepted a U.S.-backed, 20-point-plan for ending the war in the Gaza Strip on September 29, 2025, it remains unlikely that this development will lead to an end to the fighting in the near term.<sup>22</sup> Netanyahu's far-right coalition partners remain opposed to a permanent ceasefire and may collapse the government in protest. Furthermore, Hamas has yet to formally receive or agree to the framework. It is likely that significant stumbling blocks remain, including the deal's first point, which stipulates that Hamas must disarm—something the group has specifically rejected.<sup>2324</sup> During the press conference announcing the agreement, Netanyahu also appeared to add stipulations not included in the publicly available, 20-point draft document.<sup>25</sup>

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<sup>17</sup>

[hXXps://www.timesofisrael\[.\]com/trump-tells-aides-netanyahu-f-king-me-but-wont-break-publicly-with-him-report/](https://www.timesofisrael.com/trump-tells-aides-netanyahu-f-king-me-but-wont-break-publicly-with-him-report/)

<sup>18</sup> [hXXps://www.politico\[.\]eu/article/eu-unveils-plans-hit-israel-with-tariffs-sanctions-amid-gaza-war-outcry/](https://www.politico[.]eu/article/eu-unveils-plans-hit-israel-with-tariffs-sanctions-amid-gaza-war-outcry/)

<sup>19</sup> [hXXps://www.pbs\[.\]org/newshour/world/eu-lays-out-new-tariffs-and-sanctions-on-israel-over-war-in-gaza](https://www.pbs[.]org/newshour/world/eu-lays-out-new-tariffs-and-sanctions-on-israel-over-war-in-gaza)

<sup>20</sup> [hXXps://www.economist\[.\]com/middle-east-and-africa/2025/08/14/the-worlds-hardest-makeover-hamas](https://www.economist[.]com/middle-east-and-africa/2025/08/14/the-worlds-hardest-makeover-hamas)

<sup>21</sup>

[hXXps://www.haaretz\[.\]com/middle-east-news/2025-04-10/ty-article/.premium/israeli-defense-officials-estimate-hamas-will-avoid-tunnel-warfare-focus-on-explosives/00000196-1eca-d78d-a1de-ledba2600000](https://www.haaretz[.]com/middle-east-news/2025-04-10/ty-article/.premium/israeli-defense-officials-estimate-hamas-will-avoid-tunnel-warfare-focus-on-explosives/00000196-1eca-d78d-a1de-ledba2600000)

<sup>22</sup> [hXXps://www.axios\[.\]com/2025/09/29/trump-netanyahu-gaza-peace-deal-israel-meeting](https://www.axios[.]com/2025/09/29/trump-netanyahu-gaza-peace-deal-israel-meeting)

<sup>23</sup> [hXXps://www.bbc\[.\]com/news/articles/c70155nked7o](https://www.bbc[.]com/news/articles/c70155nked7o)

<sup>24</sup>

[hXXps://www.timesofisrael\[.\]com/liveblog\\_entry/senior-hamas-official-holding-hostages-in-gaza-is-temporary-until-end-of-war/](https://www.timesofisrael.com/liveblog_entry/senior-hamas-official-holding-hostages-in-gaza-is-temporary-until-end-of-war/)

<sup>25</sup> [hXXps://x\[.\]com/LahavHarkov/status/1972738491105558790](https://x[.]com/LahavHarkov/status/1972738491105558790)





## Turkey: Opposition Crackdown Likely to Continue in October 2025

Efforts by Turkey's government to crack down on political opposition intensified in September, with more developments expected by the end of October. On September 2, a Turkish court ruled that nearly 200 leading members of the Istanbul chapter of the People's Republican Party (CHP), the main opposition party, had been selected improperly at the chapter's previous leadership congress. The ruling ordered the removal of those figures and their replacement by a five-person committee appointed by the government.<sup>26</sup> While government spokespeople claimed they were rooting out corruption within the CHP, opponents argued the ruling was part of a sustained effort to reduce the CHP to a token opposition party without significant power.<sup>27</sup>

A similar case is being considered that would remove the CHP's national leader, Özgür Özel, on the grounds of improper election. The verdict was initially expected to be announced on September 15 but was delayed to October 24 after the court rejected the government's request to unseat Özel in a quick ruling.<sup>28</sup> The case is seen as a test of Turkey's judicial independence and democratic norms.

- **Forward Look:** The October 24 ruling will be closely watched and will very likely spur opposition protests in the lead up. CHP rallies are expected in Istanbul and other major cities, with attendance possibly reaching tens of thousands. If Özel is removed, the CHP will very likely organize a protest campaign lasting weeks to months.

## Asia

### The Rise of "Gen Z" Protests

This month has seen a rise in youth-led protests across the world. Following Indonesia's protests and Nepal's "Gen Z" uprising, worldwide protests have aligned with these causes. Protesters have begun naming their groups after Gen Z, calling others to arms, and bearing the pirate "Straw Hat Jolly Rogers" flag from manga comic *One Piece* (which was originally used as a symbol against corruption in Indonesia). This call to arms started in Asia but has begun to spread throughout the world.

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<sup>26</sup>

[hXXps://www.thetelegraph\[.\]com/news/world/article/court-annuls-istanbul-congress-of-turkey-s-main-21026600.php](https://www.thetelegraph.com/news/world/article/court-annuls-istanbul-congress-of-turkey-s-main-21026600.php)

<sup>27</sup> [hXXps://www.bbc\[.\]com/news/articles/ckgqzk3lqyzo](https://www.bbc.com/news/articles/ckgqzk3lqyzo)

<sup>28</sup>

[hXXps://www.reuters\[.\]com/world/middle-east/turkey-court-delays-ruling-opposition-leader-amid-political-crisis-2025-09-15/](https://www.reuters.com/world/middle-east/turkey-court-delays-ruling-opposition-leader-amid-political-crisis-2025-09-15/)



- **In Indonesia**, the Straw Hat flag was first widely adopted by young people, artists, and truck drivers as a protest symbol.<sup>29</sup> It was especially visible in the run-up to Independence Day on August 17, where the flag was hoisted on homes, cars, bikes, and beneath or beside the national Red-White flag.<sup>30</sup> Gen Z were reported to be major actors in the movement as the symbol resonated with younger Indonesians, who used pop culture references as part of protest imagery and spread it throughout social media.<sup>31</sup>
- **In Nepal**, the Straw Hat flag was later used by demonstrators as a symbol of dissent during protests sparked by a government ban on social media platforms and broader grievances about corruption, nepotism, and youth marginalization. The protest movement was largely youth driven and organized via social media, and it led to a successful change in government. It has been used by other protesters as an example of successful civil disobedience.<sup>32</sup>
- **In the Philippines**, during the Trillion Peso September March, some protesters waved the Straw Hat flag. In the Manila rallies on September 21, the flag was flown in anti-corruption protests.<sup>33</sup> In “Baha sa Luneta” protests, student participants carried One Piece imagery as a symbol of rebellion.<sup>34</sup>
- **In France**, the Straw Hat flag appeared in French protests, especially during the “Bloquons tout” (Block everything) movement.<sup>35</sup> It was carried in Paris, Toulouse, Orléans, and other cities alongside union banners and signage about social justice demands. The appearance of the flag in France was marginal in scale, but it likely indicates how the emblem is migrating beyond Asia as a Gen Z cultural protest symbol.
- **In Madagascar**, during youth-led protests over power and water cuts (Leo Délestage movement), variants of the flag (with a Malagasy-style straw hat) were used as symbols of resistance. Protesters explicitly invoked the flag’s symbolism in rejecting government

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<sup>29</sup>

[hXXps://www.reuters\[.\]com/business/media-telecom/indonesian-artists-students-unfurl-manga-pirate-sign-protest-symbol-2025-08-08/](https://www.reuters.com/business/media-telecom/indonesian-artists-students-unfurl-manga-pirate-sign-protest-symbol-2025-08-08/)

<sup>30</sup>

[hXXps://www.aljazeera\[.\]com/news/2025/8/16/indonesians-raise-anime-pirate-flag-in-protest-as-nation-marks-independence](https://www.aljazeera.com/news/2025/8/16/indonesians-raise-anime-pirate-flag-in-protest-as-nation-marks-independence)

<sup>31</sup>

[hXXps://www.thestar\[.\]com.my/aseanplus/aseanplus-news/2025/09/12/from-indonesia-to-nepal-anime-pirate-flag-has-become-symbol-of-asian-gen-zs-discontent](https://www.thestar.com.my/aseanplus/aseanplus-news/2025/09/12/from-indonesia-to-nepal-anime-pirate-flag-has-become-symbol-of-asian-gen-zs-discontent)

<sup>32</sup> [hXXps://www.ubspectrum\[.\]com/article/2025/09/the-straw-hat-flag-and-nepals-fight-for-change](https://www.ubspectrum.com/article/2025/09/the-straw-hat-flag-and-nepals-fight-for-change)

<sup>33</sup> [hXXps://www.pna\[.\]gov\[.\]ph/articles/1259843](https://www.pna.gov.ph/articles/1259843)

<sup>34</sup>

[hXXps://www.philstar\[.\]com/lifestyle/on-the-radar/2025/09/21/2474431/one-piece-flag-luneta-rally-what-does-it-mean](https://www.philstar.com/lifestyle/on-the-radar/2025/09/21/2474431/one-piece-flag-luneta-rally-what-does-it-mean)

<sup>35</sup>

[hXXps://www.lemonde\[.\]fr/en/pixels/article/2025/09/20/the-one-piece-flag-finds-its-place-in-protests-across-france\\_6745567\\_13.html](https://www.lemonde.fr/en/pixels/article/2025/09/20/the-one-piece-flag-finds-its-place-in-protests-across-france_6745567_13.html)



neglect.<sup>36</sup> As of the time of writing, 22 people have been killed, and the government has been dissolved.<sup>37</sup>

- **In Peru**, recent Peruvian youth protests over pension reforms and corruption reportedly included adoption of the Straw Hat flag.<sup>38</sup> Reports stated the flag was flown by protesters in Lima; its symbolism and the cause were strongly associated with the Gen Z movement.<sup>39</sup>
- **In Paraguay**, the Straw Hat flag was flown under the banner of Gen Z in the most recent protests in Asunción. Reports indicated the protesting Paraguayans significantly identified with the common youth frustration throughout the world. The protests were heavily youth led and generated abnormally high social media and news coverage due to their affiliation with Gen Z.<sup>40</sup>
- **Looking Forward:** The strong identification with this cause is indicative of an increasingly mobilized and political youth. While grievances may vary between countries, the cause speaks to globalized frustration. Through the heavy use of social media such as Discord and Instagram, groups across the world have successfully amplified their causes under the banner of Gen Z. This has led to increased turnout, more assertive civil disobedience, and greater media coverage. This coming month is likely to see more protests under the Gen Z banner as the cause grows in popularity.

## Seoul, South Korea: Trump–Xi Meeting at APEC Summit in October 2025

On September 19, U.S. President Donald Trump confirmed that he and Chinese President Xi Jinping will meet on the sidelines of the APEC summit in Gyeongju, South Korea, in October 2025. The announcement followed a phone call in which both leaders discussed trade, regulation of TikTok, the war in Ukraine, and fentanyl trafficking. This will mark their first in-person meeting since June 2019.

- **Expectations:** The meeting is highly significant given the absence of direct leader-level contact for over six years. Both the United States and China are likely to frame the event as a breakthrough opportunity for dialogue on contentious bilateral issues. However, tangible outcomes are less certain, as both governments face domestic and international pressures to project strength.

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<sup>36</sup> [hXXps://www.dw\[.\]com/en/madagascar-president-fires-government-after-gen-z-protests/a-74182060](https://www.dw.com/en/madagascar-president-fires-government-after-gen-z-protests/a-74182060)

<sup>37</sup> *Ibid.*

<sup>38</sup>

[hXXps://www.reuters\[.\]com/world/americas/perus-gen-z-rallies-against-president-boluarte-protesting-over-pensions-2025-09-27/](https://www.reuters.com/world/americas/perus-gen-z-rallies-against-president-boluarte-protesting-over-pensions-2025-09-27/)

<sup>39</sup> [hXXps://www.bbc\[.\]com/mundo/articles/cj4y0y7kekwo](https://www.bbc.com/mundo/articles/cj4y0y7kekwo)

<sup>40</sup>

[hXXps://www.dw\[.\]com/es/la-mecha-de-las-protestas-generaci%C3%B3n-z-prendi%C3%B3-en-paraguay/a-74181319](https://www.dw.com/es/la-mecha-de-las-protestas-generaci%C3%B3n-z-prendi%C3%B3-en-paraguay/a-74181319)



- **Trade Issues:** Trump has emphasized tariff leverage as a principal tool of U.S. foreign policy. A Trump–Xi encounter will likely result in either a temporary pause in escalating tariff measures or an announcement of sectoral negotiations (e.g., semiconductors, rare-earths). Xi is likely to push for tariff relief and assurances regarding Chinese technology companies, while Trump may tie concessions to China’s role in supporting Russia’s war effort and fentanyl precursor exports.
- **TikTok Regulation:** TikTok is likely to emerge as a headline issue. Trump has publicly suggested regulatory or ownership changes to the platform as conditions for continued U.S. access. Xi is unlikely to agree to significant concessions but may use the summit to signal flexibility in data-sharing or transparency measures to forestall harsher restrictions.
- **Looking Forward:** While the optics of a Trump–Xi handshake will likely dominate international headlines, the probability of a comprehensive agreement remains low. Instead, the summit is likely to produce symbolic gestures and ambiguous statements—a pattern echoed in prior U.S.–China summits—designed to signal progress while leaving core disputes unresolved.<sup>41</sup>

## China: 2026–2030 Five-Year Plan Set for Unveiling

The Communist Party of China (CPC) will hold its fourth plenary session from October 20–23 in the capital, Beijing, to review the country’s 15th Five-Year Development Plan for 2026–2030. The five-year plan is undergoing revisions before being formally endorsed at the plenum and will be submitted to the annual legislative session in March 2026 for final adoption.<sup>42</sup>

- **Previous Plans:** Western and Chinese media portrayals of China’s Five-year plans paint them as rigid blueprints for China’s economic and social policy goals. This is often the case—particularly with regard to more recent five-year plans, which instituted reforms that helped open the Chinese economy and others credited with boosting prosperity. However, elements of previous five-year plans have been disregarded over the five-year period, and current events often dictate changes to the approach. Nevertheless, the high-profile announcement indicates economic and geopolitical areas of focus for the CPC. The upcoming five-year plan will reportedly focus on boosting domestic consumption, technological innovation, and sustainable development.<sup>43</sup>

<sup>41</sup>

[hXXps://www.reuters.com/world/china/view-analysts-react-call-between-trump-xi-over-trade-tiktok-2025-09-19/](https://www.reuters.com/world/china/view-analysts-react-call-between-trump-xi-over-trade-tiktok-2025-09-19/)

<sup>42</sup>

[hXXps://www.reuters.com/world/china/chinas-communist-party-hold-fourth-plenum-october-20-23-2025-09-29/](https://www.reuters.com/world/china/chinas-communist-party-hold-fourth-plenum-october-20-23-2025-09-29/)

<sup>43</sup>

[hXXps://www.firstpost.com/world/china-announces-key-huddle-for-5-year-blueprint-amid-tussle-with-trumps-america-13937878.html](https://www.firstpost.com/world/china-announces-key-huddle-for-5-year-blueprint-amid-tussle-with-trumps-america-13937878.html)



## Japan Leadership Election

On September 9, 2025, Japan's ruling Liberal Democratic Party (LDP) announced it will hold a snap leadership election to choose a successor to Prime Minister Ishiba Shigeru. The official campaign period will run from September 22 for 12 days, with voting scheduled for October 4. The winner will automatically become Japan's next prime minister, given the LDP's parliamentary majority.<sup>44</sup>

- **Context:** Ishiba's resignation comes amid growing domestic and foreign pressures. Inflation and cost-of-living concerns remain top issues, while Japan also faces foreign policy challenges—including heightened tensions with China in the East China Sea and strain in the U.S.-Japan alliance over defense commitments and trade disputes.
- **Domestic Dynamics:** The leadership race is very likely to focus on economic management, particularly inflation, energy costs, and social welfare. Candidates are expected to present credible approaches to stabilizing household finances, which may overshadow foreign policy debates in the short term.<sup>45</sup> However, factional politics within the LDP—historically decisive in leadership contests—will very likely remain a key factor in determining the outcome.
- **Foreign Policy Stakes:** Japan's external environment will loom large once a new leader is in place. China's maritime activity near the Senkaku/Diaoyu Islands has escalated in recent months, while North Korea has increased the tempo of ballistic missile tests. U.S.-Japan ties, traditionally the bedrock of Japan's security policy, are under pressure from disagreements on burden-sharing for regional defense and U.S. tariff actions that have impacted Japanese exporters.<sup>46</sup>
- **Looking Forward:** The October 4 leadership vote is very likely to deliver continuity in broad policy terms, as all major LDP contenders support strong defense ties with Washington and a robust security posture toward Beijing and Pyongyang. Nonetheless, the incoming prime minister will face immediate tests: reassuring voters on inflation and cost of living, managing an increasingly assertive China, and negotiating with a Trump administration that is pressuring Tokyo on both defense costs and trade.

<sup>44</sup>

[hXXps://www.gzeromedia\[.\]com/news/analysis/japans-leadership-race-gender-milestone-or-generational-reset](https://www.gzeromedia.com/news/analysis/japans-leadership-race-gender-milestone-or-generational-reset)

<sup>45</sup>

[hXXps://apnews\[.\]com/article/japan-ldp-leadership-race-koizumi-takaichi-ishiba-7deaf7bcd41d4ca8274984181a86ce18](https://apnews.com/article/japan-ldp-leadership-race-koizumi-takaichi-ishiba-7deaf7bcd41d4ca8274984181a86ce18)

<sup>46</sup>

[hXXps://www.scmp\[.\]com/news/china/military/article/3327478/chinas-military-sees-threat-expanded-us-drills-japan-and-south-korea](https://www.scmp.com/news/china/military/article/3327478/chinas-military-sees-threat-expanded-us-drills-japan-and-south-korea)





## **| Africa**

### **Côte d'Ivoire Election on October 25, 2025**

Côte d'Ivoire will hold its presidential election on October 25, 2025, where President Alassane Ouattara is very likely to win a fourth term. Despite the Ivoirian constitution limiting presidents to one reelection, Ouattara has been accused of previously leveraging state power to prevent effective opposition. Similar accusations have been made during this election, with both of his principal opponents (ex-President Laurent Gbagbo and former Chief Executive Officer of Credit Suisse Tidjati Thiame) having been disqualified from running.<sup>47</sup> Both candidates had been working together in a "common front" to insist on the validity of their candidatures and on the need to replace Ouattara, but the Constitutional Council declared both ineligible.<sup>48</sup>

- Social Unrest:** There is great concern about post-election violence after Ouattara is declared the winner. Since 2000, Côte d'Ivoire has experienced a military coup, a civil war, a first refusal by a president to cede power (when Gbagbo was defeated by Ouattara in 2010), and post-election violence (in 2020 when citizens protesting Ouattara's unconstitutional third term were suppressed by security forces).<sup>49</sup> While protests this year have thus far been peaceful, the near-total disenfranchisement of the opposition creates tensions which have a roughly even chance of spilling over into more violent confrontation.

### **Tanzania to Host Elections in October 2025**

On October 29, 2025, Tanzania will host a general election, with incumbent President Samia Suluhu Hassan and 16 other candidates competing for the presidency. The ruling Chama Cha Mapinduzi (CCM) Party is widely anticipated to win the election, particularly after the main opposition Party for Democracy and Development (CHADEMA) announced plans to boycott the election.<sup>50</sup> President Samia Suluhu Hassan will run against candidates from smaller opposition parties that have not garnered significant votes in previous elections. The election has the potential to further concentrate the CCM Party's power in both Tanzania's executive branch and the National Assembly.

<sup>47</sup>

[hXXps://www.lemonde.fr/afrique/article/2025/09/09/election-en-cote-d-ivoire-alassane-ouattara-en-position-d-e-force-apres-l-exclusion-definitive-de-ses-principaux-rivaux\\_6640128\\_3212.html](https://www.lemonde.fr/afrique/article/2025/09/09/election-en-cote-d-ivoire-alassane-ouattara-en-position-d-e-force-apres-l-exclusion-definitive-de-ses-principaux-rivaux_6640128_3212.html)

<sup>48</sup>

[hXXps://www.aljazeera.com/news/2025/6/4/key-ivory-coast-opposition-figures-banned-from-october-president-ial-vote](https://www.aljazeera.com/news/2025/6/4/key-ivory-coast-opposition-figures-banned-from-october-president-ial-vote)

<sup>49</sup> [hXXps://www.bbc.com/afrique/articles/cy0q7v0gw0jo](https://www.bbc.com/afrique/articles/cy0q7v0gw0jo)

<sup>50</sup>

[hXXps://www.reuters.com/world/africa/tanzania-president-cleared-run-october-election-key-rivals-barred-2025-08-27/](https://www.reuters.com/world/africa/tanzania-president-cleared-run-october-election-key-rivals-barred-2025-08-27/)



- **Election Concerns:** Opposition repression, political crackdowns, and election transparency and fairness are the primary concerns for the general election. While President Hassan has urged that the October 2025 election remains peaceful, fair, and orderly, critics have expressed concerns that Tanzania's government has repressed opposition groups through various methods, such as mass arrests, and crackdowns on opposition gatherings.<sup>51</sup><sup>52</sup> In the 2020 election, the CCM Party won the general election by approximately 85 percent of votes, and the CHADEMA Party obtained 13 percent of votes.<sup>53</sup> The October 2025 election will be the first election without the CHADEMA Party after party officials refused to sign revised codes of conduct, effectively boycotting the election. CHADEMA party chairman Tundu Lissu has also remained imprisoned on charges of treason for several months.<sup>54</sup> Similarly, second largest opposition ACT Wazalendo was also barred from participating in the election, further indicating that the ruling CCM Party will retain power.
- **Social Unrest:** The election has the potential to result in social unrest linked to perceived grievances against the ruling CCM party. These gatherings have the potential to turn violent with little to no notice. The government has used heavy-handed tactics on protesters in the past, as evinced by the temporary detainment of 500 people attempting to attend a CHADEMA rally in August 2024.<sup>55</sup> Violence amid the elections has a roughly even chance of materializing.

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<sup>51</sup><sup>52</sup> [hXXps://www.rfi.fr/en/africa/20250915-tanzania-opposition-presidential-candidate-banned-from-running-again](https://www.rfi.fr/en/africa/20250915-tanzania-opposition-presidential-candidate-banned-from-running-again)<sup>53</sup> [hXXps://www.rfi.fr/en/africa/20240814-freed-tanzanian-opposition-leaders-beaten-during-mass-arrests](https://www.rfi.fr/en/africa/20240814-freed-tanzanian-opposition-leaders-beaten-during-mass-arrests)<sup>54</sup> [hXXps://www.aljazeera.com/news/2020/10/30/magufuli-wins-re-election-in-tanzania-says-electoral-commission](https://www.aljazeera.com/news/2020/10/30/magufuli-wins-re-election-in-tanzania-says-electoral-commission)<sup>55</sup> [hXXps://www.bbc.com/swahili/articles/ckgllkrr5r65o](https://www.bbc.com/swahili/articles/ckgllkrr5r65o)<sup>55</sup> [hXXps://www.dw.com/en/tanzania-opposition-chadema-says-senior-leaders-arrested/a-69920162](https://www.dw.com/en/tanzania-opposition-chadema-says-senior-leaders-arrested/a-69920162)

## Appendix A: Traffic Light Protocol for Information Dissemination

	<div>Red</div>	<div>Amber</div>
WHEN SHOULD IT BE USED?	<p>Sources may use <b>TLP:RED</b> 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.</p>	<p>Sources may use <b>TLP:AMBER</b> when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.</p>
HOW MAY IT BE SHARED?	<p>Recipients may <b>NOT</b> share <b>TLP:RED</b> with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.</p>	<p>Recipients may <b>ONLY</b> share <b>TLP:AMBER</b> 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.</p> <p>Note that <b>TLP:AMBER+STRICT</b> restricts sharing to the organization only.</p>
	<div>Green</div>	<div>Clear</div>
WHEN SHOULD IT BE USED?	<p>Sources may use <b>TLP:GREEN</b> when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.</p>	<p>Sources may use <b>TLP:CLEAR</b> when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.</p>
HOW MAY IT BE SHARED?	<p>Recipients may share <b>TLP:GREEN</b> information with peers and partner organizations within their sector or community but not via publicly accessible channels.</p>	<p>Recipients may share <b>TLP:CLEAR</b> information without restriction, subject to copyright controls.</p>



## Appendix B: ZeroFox Intelligence Probability Scale

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

Almost No Chance	Very Unlikely	Unlikely	Roughly Even Chance	Likely	Very Likely	Almost Certain
1-5%	5-20%	20-45%	45-55%	55-80%	80-95%	95-99%

