

PAPUA NEW GUINEA NATIONAL INTELLIGENCE ORGANISATION (NIO)

QUARTERLY INTELLIGENCE REPORT

Quarter 3 | July - September 2025

Executive Abstract

Q3 2025 revealed a volatile national security landscape shaped by LLG election disruptions, governance instability and intensifying tribal violence, particularly in Enga, Hela and WHP. Intelligence confirmed firearms trafficking through the Port Moresby–Wapenamanda and Kandep–Kerowagi corridors, indicating a developing arms accumulation trend that is increasing the lethality of tribal conflicts. Social and institutional pressures worsened through urban violence, sorcery-related killings, prison overcrowding and declining public trust. PNG's grey-listing, illegal mining activity and resource-sector volatility further weakened economic stability. Regionally, escalating conflict in West Papua, refugee inflows and geopolitical contest around the paused Pukpuk Treaty heightened external security pressure. Despite these challenges, the 50th Independence Anniversary was effectively secured through coordinated intelligence-led operations.

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FOREWORD

The Third Quarter 2025 National Intelligence Assessment captures the evolving political, economic, social, and internal security environment shaping Papua New Guinea's stability between July and September. This period was defined by significant domestic turbulence, including the challenges associated with the Local-Level Government (LLG) elections, resource-sector tensions, tribal conflicts—particularly in Enga—and governance issues affecting key national institutions.


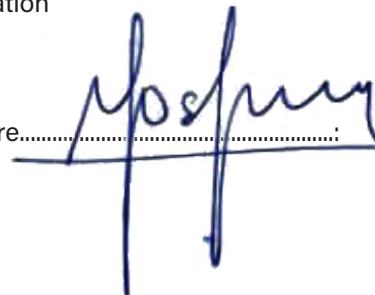
At the same time, PNG navigated increased geopolitical scrutiny, internal protests, regional instability in West Papua, and the national security requirements of the country's 50th Independence Anniversary celebrations. Illegal mining, economic uncertainty linked to PNG's grey-listing, and social media-driven mobilisation continued to expose vulnerabilities that adversaries and opportunistic groups could exploit.

The assessment highlights the need for proactive, intelligence-led intervention across multiple domains—election security, tribal conflict containment, countering transnational crime, safeguarding critical infrastructure, and strengthening governance. NIO remains committed to providing timely analysis to support informed decision-making by the Government as PNG advances towards the 2027 General Election and navigates a rapidly shifting regional security landscape

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Acting Director General
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Date:...../...../2025

Signature.....





EXECUTIVE SUMMARY

Q3 2025 presented a multi-dimensional and increasingly volatile security environment, driven by disruptions to the LLG elections, governance instability, intensifying tribal violence, and deepening economic fragility. Election delays, voter roll manipulation allegations, and localised violence eroded public confidence and contributed to growing political tension nationwide. Tribal conflicts in Enga, Hela and Western Highlands escalated sharply, threatening major national infrastructure—including airports, highways, and mining operations—as organised gunmen, high-powered weapons, and increasingly sophisticated conflict actors shaped a more lethal battlespace.

Notably, multiple Q3 intelligence reports identified firearms smuggling through Enga-linked corridors, including the Port Moresby–Wapenamanda route and weapons movement from Kandep and Kerowagi. While no report explicitly confirmed an “arms build-up,” NIO assesses that the persistent inflow of weapons into Enga conflict zones represents a developing build-up capability, contributing to heightened lethality and prolonging tribal engagements.

Beyond Enga, national vulnerabilities widened as governance frictions—such as the KPHL leadership crisis and the CIS Commissioner dispute—created institutional uncertainty. Social tensions intensified through rising urban violence, sorcery-related killings, prison overcrowding, and widespread public dissatisfaction, while economic pressures increased due to PNG’s grey-listing, illegal mining expansion, and volatility around key resource projects. Internal security challenges were amplified by anti-government sentiment and misinformation campaigns during the 50th Independence Anniversary, though the celebrations concluded without major disruption due to effective intelligence-led coordination.

Regionally, Indonesia’s military posture in West Papua, refugee inflows, and the geopolitical contest surrounding the paused Pukpuk Treaty placed additional strain on PNG’s external security environment. These developments, combined with growing transnational criminal activity and shifts in regional geostrategic alignments, underscored a complex and dynamic threat landscape.

Overall, Q3 demonstrated a period of volatile but manageable national security conditions, requiring sustained monitoring, intelligence-led intervention, and strengthened whole-of-government coordination as PNG progresses toward the 2027 National General Election.



POLITICAL GOVERNANCE ISSUES

LLG Elections and By-Elections

The LLG elections faced considerable turbulence across Q3, marked by repeated deferrals, roll disputes, and allegations of politically motivated voter re-alignment. Manipulation concerns surrounding newly created wards heightened distrust in the PNG Electoral Commission, particularly in areas with a history of electoral violence. While some districts proceeded smoothly, high-risk electorates—most notably Porgera-Paiela—experienced ballot box hijacking, intimidation of officials, and violence. These trends signal systemic vulnerabilities that must be addressed ahead of the 2027 National General Elections.

Political Party Stability

Weak institutional structures within political parties continued to drive instability, with parties lacking administrative capacity, policy clarity, and transparent membership processes. The movement of MPs between parties, combined with unfunded party registry operations, further eroded the credibility of PNG's political framework. Suggested reforms, including increased candidate nomination fees and stronger compliance oversight, were highlighted as necessary measures to strengthen political discipline.

Governance Crises – KPHL & CIS

Major governance tensions surfaced following the suspension of KPHL Managing Director Wapu Sonk, which triggered protests, road blockades, and tribal mobilisation in Nipa—directly threatening national energy infrastructure. The CIS leadership dispute similarly escalated, with CI Nepo and DC Suagu commanding rival factions that required police intervention to prevent violent confrontation. These incidents revealed how quickly institutional disputes can transform into national security risks when intersecting with tribal loyalties and political patronage.

Disinformation Targeting the Judiciary

A falsified AFP letter and fabricated media content were used in a coordinated attempt to discredit Chief Justice Sir Gibbs Salika. This targeted attack on the Judiciary reflects a growing weaponisation of social media and digital platforms to undermine state institutions. The sophistication of the campaign raises concerns about foreign influence, political manipulation, and the vulnerability of public opinion to coordinated misinformation.



SOCIAL ISSUES

Urban Violence and Settlement Instability

Urban centres experienced heightened ethnic and settlement-based confrontations, particularly in Port Moresby, Lae and Wewak. These incidents resulted in fatalities, property destruction, and the displacement of vulnerable families. Violence of this nature reflects the structural pressures tied to informal settlement growth, unemployment, and limited policing capacity. Without strengthened urban governance and law enforcement presence, such incidents are likely to escalate during periods of political and economic stress.

Correctional Services and Prison Overcrowding

Correctional institutions—particularly Buimo—remained dangerously overcrowded, with inmate populations exceeding design capacity by hundreds. Ration shortages, deteriorating infrastructure, insufficient weapons, and understaffed security personnel significantly increased the probability of major prison breakouts. These systemic deficiencies undermine national law-and-order capability and expose operational vulnerabilities within correctional management.

Health Sector Limitations and Outbreak Risk

Health service delivery remained inconsistent, with persistent shortages of medicine, equipment, and specialist personnel across provinces. The confirmation of a polio paralysis case in Enga highlighted limitations in immunisation coverage and disease surveillance systems. If these structural weaknesses persist, PNG may find itself struggling to contain multiple outbreaks simultaneously.

Sorcery-Related Violence

Sorcery-accusation-related violence persisted as a severe societal threat, with incidents reflecting entrenched cultural manipulation, gender inequality, and impunity. Viral videos depicting torture and murder amplified public shock and illustrated the limits of police enforcement reach in remote communities. Such violence disproportionately harms women and continues to contribute to long-term social fragmentation.

Vulnerable Groups and Social Protection Gaps

Women, youth, children, the elderly, and persons with disabilities remain the most exposed to poverty, unemployment, crime, and lack of access to essential services. Weak social protection systems and limited government outreach continue to worsen vulnerability levels. Without targeted policy interventions, these groups will remain disproportionately affected by instability and economic hardship.



LAW AND ORDER & TRANSNATIONAL CRIMES

Tribal Conflict in Enga, WHP & Hela

Tribal fighting intensified across Enga, with fatalities, large-scale displacement, and repeated threats to critical infrastructure including power pylons, the Highlands Highway, and key access routes into Mulitaka, Kompam and Wapenamanda. The conflict environment showed clear signs of increased coordination among tribal fighters, the recruitment of gunmen from other provinces, and suspected involvement of rogue security personnel supplying weapons—amounting to a significant escalation in tribal combat capability.

Intelligence from August and September further identified firearms and ammunition smuggling along the Port Moresby–Wapenamanda corridor, as well as weapons movement from Kandep into Kerowagi, indicating a steady inflow of guns into Enga-linked conflict zones. Although not formally identified as a deliberate arms stockpile, NIO assesses that this persistent inflow creates the conditions for an effective arms build-up, raising both the lethality and duration potential of tribal engagements.

Collectively, these dynamics substantially elevate operational risks for police, resource operators, and surrounding civilian populations.

National Crime Trends

Serious crime—including drug offences, robbery, murder, rape and arson—remained consistently high. Arrest rates were low due to limited manpower, poor mobility, and inadequate investigative capacity. Gang activity in East and West New Britain also expanded, with groups such as the Mantol Gang demonstrating more organised criminal behaviour.

Transnational Criminal Networks

Illegal alluvial mining networks—especially involving Chinese entities—continued to expand across Gulf, Morobe, and East New Britain. Counterfeit goods, drug smuggling, and cross-border operations suggest that transnational networks have entrenched themselves within local criminal economies. Weak border surveillance, corruption, and limited enforcement capabilities remain major enablers of these networks.



ECONOMIC AND RESOURCE SECURITY

Macroeconomic Conditions and Grey Listing

Economic indicators were mixed, with liquidity marginally improving and the Kina Facility Rate maintained at 4.0%. PNG's re-listing on the FATF grey list, however, underscored serious deficiencies in financial oversight and prosecution capability. Over 5,000 suspicious transactions were flagged, yet enforcement was limited. This remains a significant ongoing risk to investor confidence and international financial relationships.

Resource Project Tensions – Frieda, Porgera & LNG

The Frieda River project faced intensified community opposition due to concerns about environmental degradation along the Sepik River system. Porgera continued to face escalating illegal mining activity, including mass trespass and bridge removals that disrupted operational access. Meanwhile, major LNG projects remained positioned for operational rollout between 2028 and 2030, but face risks if landowner tensions and environmental concerns are not effectively addressed.

Special Economic Zones and Illicit Finance Risks

SEZs presented opportunities for long-term economic expansion but also posed significant risks for money laundering, counterfeit production, trafficking and unregulated labour markets. Without strong regulatory oversight and intelligence monitoring, SEZs risk becoming hubs for illicit financial activity and transnational crime.



AUTONOMOUS REGION OF BOUGAINVILLE

2025 Presidential Elections and Independence Tensions

Bougainville's Presidential election proceeded peacefully, although minor incidents of intimidation and firearm discharge were recorded. President Ismael Toroama's continued mandate reflects sustained support for independence. Frustration over PNG's delayed ratification of the referendum persists and, if unaddressed, may strengthen political agitation leading into 2027. Concerns over the ABG–Sea Shepherd maritime MOU further highlight sensitive jurisdictional and sovereignty dimensions.

INTERNATIONAL AND REGIONAL SECURITY

Papua-Indonesia Border Tensions

Increased military activity by the Indonesian National Armed Forces (TNI) near Tomka and Wara Samol heightened border sensitivities, raising concerns of potential incursions and escalating conflict in West Papua. The arrival of 153 asylum seekers at Weam highlights both humanitarian and security implications for PNG.

Regional Geopolitics and the Pukpuk Treaty

The Pukpuk Treaty faced strong domestic criticism centred on sovereignty concerns, prompting its suspension. Regional powers—including China and Indonesia—expressed reservations, reflecting broader strategic competition. The detection of a suspected narco-submarine in Solomon Islands further underscores the presence of external criminal cartels in the Pacific with potential PNG linkages.

PNG's 50th Independence Anniversary Security

Despite efforts by online groups to incite mobilisation, the 50th Anniversary celebrations proceeded peacefully. High-level dignitary visits—such as those by the Indonesian Vice President and Prince Edward—were successfully secured due to coordinated, intelligence-led operational planning.





SUMMARY AND OUTLOOK - Q3 2025

Economic Outlook

The third quarter of 2025 revealed a highly interconnected and increasingly unstable national security environment where political disruptions, law-and-order pressures, economic fragility, and regional geopolitical shifts converged. The cascading impact of LLG election delays, governance disputes, intensifying tribal violence and expanding transnational criminal activity demonstrated that PNG is currently operating within a complex vulnerability matrix.

Weak electoral processes and declining public trust pose early risks to the credibility of the 2027 National General Election, while escalating settlement violence and urban disorder reflect growing social frustration driven by unemployment, inequality, and diminishing confidence in state institutions. Tribal conflicts—particularly in Enga—remain the most acute internal security threat, characterised by high-powered firearms, organised hired fighters, increased coordination among tribal groups, and the involvement of rogue security personnel.

Arms-smuggling intelligence from Q3—specifically referencing the Port Moresby–Wapenamanda corridor and the Kandep–Kerowagi trafficking routes—indicates rising inflows of weapons into Enga-linked conflict zones. While no explicit arms build-up was reported, the persistent movement of firearms provides strong indicators of a developing arms accumulation trend, increasing the lethality and duration potential of tribal fighting heading into Q4.

At the same time, illegal mining, grey-listing, contraband markets and cross-border trafficking continue to erode economic stability, enabled by weak enforcement capacity and corruption. Regionally, the intensifying West Papua conflict poses spill-over risks, including asylum seeker inflows, border incursions, and exploitation by transnational criminal groups. Geopolitical competition surrounding the paused Pukpuk Treaty, coupled with broader strategic alignment pressures in the Indo-Pacific, will continue to shape PNG's external security posture. Economic pressures, urban crime, and digital disinformation are expected to increase, particularly as politically motivated actors seek to influence narratives ahead of the 2027 election cycle.

Looking into Q4 2025, NIO assesses several high-probability developments:

- Election disputes will persist as unresolved LLG grievances influence preparations for the 2027 polls.
- Tribal warfare in Enga, Hela and WHP is likely to intensify as armed groups become more organised and better equipped.
- Economic pressures stemming from grey-listing and illegal resource exploitation will continue.
- Urban crime and settlement violence are expected to rise amid economic hardship and limited policing capacity.
- Geopolitical pressure will increase as major powers court PNG while the Pukpuk Treaty remains paused.
- Bougainville political advocacy may strengthen, with renewed calls for referendum ratification timelines.
- Digital disinformation campaigns will escalate, targeting political, judicial and security institutions.

Overall, Q3 underscored a period of volatile but manageable national security conditions, requiring sustained monitoring, intelligence-led operations, and coordinated whole-of-government interventions as PNG approaches a critical pre-election period.

End of Report

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