



# PAPUA NEW GUINEA NATIONAL INTELLIGENCE ORGANISATION (NIO) QUARTERLY INTELLIGENCE REPORT

**Quarter 4 | October – December 2025**

## **Executive Abstract**

The Q4 2025 intelligence assessment finds Papua New Guinea entering 2026 with high and converging risks across political, governance, social, economic, and security spheres, driven by weakened electoral integrity following the 2025 LLG elections, persistent governance and accountability deficits, mounting economic pressures, and deteriorating social conditions. Law-and-order challenges remain acute—particularly in Enga and the Highlands—with sustained tribal conflict, attacks on police, threats to critical infrastructure, and signs of eroding state authority, while social stressors such as health system strain, rising HIV infections, gender-based violence, youth unemployment, substance abuse, unmanaged urbanisation, and climate impacts continue to undermine cohesion. These domestic pressures are compounded by strategic uncertainties linked to the PNG–Australia Pukpuk Treaty, ongoing border vulnerabilities with Indonesia, and the unresolved Bougainville independence process. Overall, the national threat environment is assessed as HIGH and trending upward, with 2026 likely to be a risk-accumulation year requiring early, coordinated, whole-of-government intervention to prevent escalation ahead of the 2027 National General Elections.



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# PAPUA NEW GUINEA NATIONAL INTELLIGENCE ORGANISATION

## ..... *Quarterly Intelligence Report* .....



### FOREWORD

This Fourth Quarter (Q4) National Intelligence Report consolidates intelligence reporting, threat assessments, special briefs, intelligence summaries, and open-source intelligence products produced between October and December 2025. The report reflects whole-of-government security, governance, economic, and social risk considerations and is intended to inform senior leadership, including the National Executive Council (NEC), National Security Advisory Committee (NSAC), and senior departmental heads.

The reporting period captures a decisive phase in Papua New Guinea's security trajectory as the country transitions from the 2025 Local-Level Government elections toward the preparatory phase for the 2027 National General Elections. Intelligence during this quarter highlights increasing convergence between political activity, governance weaknesses, economic pressure, social stressors, and law-and-order challenges. These dynamics collectively shape a complex and elevated threat environment moving into 2026.

This report does not assess isolated incidents in isolation but evaluates cumulative trends, escalation pathways, and structural vulnerabilities. It aims to support early decision-making, preventative action, and coordinated national responses rather than reactive crisis management.

**Lieutenant Colonel Joshua Dorpar BA, EMBA**

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

Signature.....





## EXECUTIVE SUMMARY

The fourth quarter of 2025 was characterised by heightened institutional strain, growing public dissatisfaction, and sustained security challenges across multiple sectors. Intelligence indicates that political, economic, social, and security risks are no longer operating independently but are increasingly reinforcing one another.

Politically, the conduct and aftermath of the 2025 Local-Level Government elections exposed systemic weaknesses in electoral governance, legal compliance, and institutional coordination. Issues surrounding the creation of new wards and LLGs outside prescribed legal frameworks, deficiencies in voter registration systems, and logistical delays have contributed to declining public confidence in democratic processes. These vulnerabilities are assessed as early indicators of heightened election-related risk as the country moves toward 2027.

Governance and accountability pressures intensified during the quarter, driven by corruption allegations, leadership instability within key institutions, and weak enforcement capacity. Public-sector credibility remains fragile, amplifying the risk that political or economic shocks could translate into unrest.

Economically, intelligence reporting highlights mounting stress from tax reform uncertainty, SME fragility, wage policy impacts, illegal resource extraction, and delays to strategic projects such as Porgera and Papua LNG. These pressures are increasingly intersecting with security risks, particularly where economic grievances overlap with landowner disputes, illegal mining, and infrastructure sabotage.

Socially, Papua New Guinea continues to face deep structural challenges. Health system strain, rising HIV infections, gender-based violence, youth unemployment, substance abuse, climate-induced disasters, and unmanaged urbanisation collectively undermine social cohesion and long-term stability.

From a law-and-order perspective, sustained tribal conflict in Enga and parts of the Highlands, attacks on police, threats to critical infrastructure, and emerging community vigilantism signal persistent erosion of state authority in key areas. Overall, the national threat environment at the close of Q4 2025 is assessed as HIGH and TRENDING UPWARD, with 2026 likely to be a risk-accumulation year requiring early and coordinated intervention.





## POLITICAL GOVERNANCE ISSUES

Political and governance developments during Q4 2025 reflect an environment of increasing fragility. The LLG elections held during the quarter became a focal point for broader concerns regarding democratic integrity, institutional competence, and political legitimacy. Intelligence assessments indicate that while large-scale election-related violence was avoided, underlying vulnerabilities remain unresolved.

A key issue identified was the establishment of new Local-Level Governments and wards without full compliance with procedures outlined under the Organic Law. These actions, undertaken without adequate consultation or transparency, have raised serious legal and constitutional questions. The redistribution of voters into newly created wards further complicated the credibility of voter rolls, particularly in the absence of reliable population data and identification systems. The debate surrounding biometric voter registration intensified during the quarter. While biometric systems are viewed as a potential solution to long-standing electoral weaknesses, intelligence reporting highlights risks associated with poor legal frameworks, limited technological readiness, cost implications, and low levels of digital inclusion across rural communities. Failure to address these foundational issues may introduce new vulnerabilities rather than resolve existing ones.

Governance confidence was further undermined by persistent corruption narratives, leadership instability in key agencies, and public frustration over perceived misuse of public funds. Social media platforms played a central role in amplifying political grievances, budget-related criticism, and Vote of No Confidence narratives. Although these discussions did not translate into immediate mass mobilisation, they contributed to a heightened atmosphere of mistrust and political sensitivity.

Institutional coordination challenges remain pronounced. Intelligence assessments of key national assets, including Jacksons International Airport, revealed significant gaps in leadership cohesion, SOP compliance, and inter-agency collaboration. These governance deficiencies create exploitable vulnerabilities for organised crime, insider threats, and external actors.





## SOCIAL ISSUES

Social stability indicators during Q4 2025 continued to deteriorate, reflecting deep-rooted structural challenges. The health sector remains under acute strain, with repeated shortages of essential medicines, scaled-down clinical services, and increasing pressure on referral hospitals. Rising HIV infection rates, particularly among young people, represent a growing public health and security concern with long-term implications.

Gender-based violence and sorcery accusation-related violence remain widespread, significantly undermining social cohesion and economic participation. Intelligence assessments note that these forms of violence are not only human rights issues but also contribute directly to insecurity, displacement, and inter-communal tension.

Youth-related pressures intensified during the quarter. High unemployment, limited access to education and skills training, substance abuse, and social marginalisation continue to create conditions conducive to criminal activity and violence. Emerging trends such as petrol sniffing and increased marijuana use in urban and peri-urban areas were assessed as early warning indicators of broader social breakdown if left unaddressed.

Urbanisation and displacement present growing risks. Unmanaged settlement expansion on the fringes of major towns is leading to the formation of ethnically and tribally aligned enclaves, increasing the likelihood of urban violence and organised criminal activity. Weak land administration and planning exacerbate these trends.

Climate-induced flooding and environmental degradation further compounded social vulnerability during the quarter, damaging infrastructure, disrupting livelihoods, and placing additional strain on already limited government response capacity.





## LAW AND ORDER & TRANSNATIONAL CRIMES

Law-and-order conditions remained severe throughout Q4 2025, particularly in the Highlands region. Enga Province continued to experience sustained armed tribal conflict, compounded by illegal mining activities, political interference, and environmental disasters such as landslides. These factors collectively weakened state authority and increased the risk of escalation.

Attacks on police personnel and threats to critical infrastructure, including airports, bridges, and power transmission lines, were identified as significant concerns. Intelligence reporting indicates that ceasefires in conflict areas are often temporary and exclusionary, failing to address underlying inter-tribal grievances.

Highway insecurity, especially along the Highlands Highway, disrupted transport and commerce, affecting national supply chains. Community-led vigilantism emerged in several areas as a response to perceived policing gaps, introducing new risks of retaliation and uncontrolled escalation.

Transnational crime risks persist, particularly in relation to illegal resource extraction, smuggling, and organised criminal networks exploiting weak border controls and institutional capacity constraints. Correctional facilities faced acute challenges during the festive period due to funding shortfalls, overcrowding, and service disruptions, raising internal security and humanitarian concerns.





## ECONOMIC AND RESOURCE SECURITY

Economic intelligence during Q4 2025 underscores a fragile operating environment. Uncertainty surrounding the implementation of new tax legislation generated anxiety among businesses and raised the risk of protest if clarity is not provided. SMEs remain particularly vulnerable, facing high operating costs, limited access to finance, and minimal state support.

Resource security concerns remain central. Illegal alluvial mining, often involving foreign-linked actors, continues to generate social conflict, environmental degradation, and revenue losses. At Porgera, unresolved landowner grievances and infrastructure sabotage risks threaten one of the country's most critical economic assets.

The Papua LNG project, while strategically vital, faced potential delays arising from environmental and social complaints lodged with international financiers. These developments highlight the increasing intersection between economic development, environmental governance, and security risk.

Agriculture remains underutilised as an economic stabiliser despite its central role in livelihoods. Intelligence assessments emphasise the need for data-driven policy, infrastructure investment, and land-use reform to strengthen resilience.





## AUTONOMOUS REGION OF BOUGAINVILLE

Bougainville remains a critical long-term national security issue. Strong public support for independence following the 2019 referendum continues to shape political expectations. During Q4 2025, assurances regarding parliamentary consideration of the referendum outcome were welcomed, but challenges remain in achieving national consensus.

Intelligence assessments indicate that while immediate instability is unlikely, delays or perceived backtracking could trigger renewed tension. Bougainville's leadership continues to consolidate internal political authority in preparation for negotiations, while economic viability and institutional capacity remain key challenges. Effective management of the Bougainville process will require sustained political engagement, transparent communication, and adherence to agreed frameworks to prevent destabilisation.





## INTERNATIONAL AND REGIONAL SECURITY

PNG's strategic environment continues to evolve amid heightened Indo-Pacific competition. The PNG-Australia Pukpuk Treaty represents a significant realignment, generating mixed domestic perceptions and cautious responses from regional actors, including China.

Border vulnerabilities with Indonesia persist, particularly along the Bula-Torasi corridor, where illegal fishing and cross-border movements threaten livelihoods and food security. Proposed Australia-Indonesia security arrangements further underscore the strategic sensitivity of PNG's western border.

International security developments, including incidents of political instability and terrorism abroad, reinforce the importance of intelligence partnerships, information sharing, and border security cooperation.





## STRATEGIC WARNING FOR 2027

Intelligence indicators observed during Q4 2025 constitute early strategic warning signs for the 2027 National General Elections (NGE). These include declining confidence in electoral processes following the 2025 LLG elections, unresolved voter roll integrity issues, unlawful ward creation, and increasing politicisation of administrative institutions. Economic stressors—particularly tax reform impacts, unemployment, and cost-of-living pressures—are assessed as potential catalysts for mobilisation and election-period unrest. Sustained tribal conflict, illegal firearms proliferation, and weakening law-and-order capacity in key provinces increase the risk of election-related violence, intimidation, and disruption of polling logistics.

The information environment presents an additional risk vector, with social media increasingly used to amplify grievances, spread disinformation, and mobilise supporters along political, tribal, and regional lines. If unmitigated through early reforms, security preparedness, and coordinated inter-agency planning, these factors are likely to converge during the election cycle, elevating the risk of widespread instability and contested outcomes. Proactive engagement, intelligence-led security planning, and restoration of public confidence in electoral governance are assessed as critical preventative measures.





## SUMMARY AND OUTLOOK – Q4 2025

Q4 2025 intelligence assessments indicate that Papua New Guinea is entering 2026 with converging and mutually reinforcing risks across political, economic, social, and security domains. Election-related vulnerabilities, governance deficits, economic pressures, and persistent law-and-order challenges collectively increase the likelihood of instability if left unaddressed.

Short-term outlook (Q1-Q2 2026): Increased public sensitivity to economic measures, continued law-and-order volatility, and rising political mobilisation.

Medium-term outlook (Q3-Q4 2026): Escalation of election-related positioning, resource mobilisation, and influence operations ahead of the 2027 National General Elections.

Overall Threat Assessment: HIGH – Trending Upward.

Early, coordinated, whole-of-government intervention remains critical to mitigating escalation and safeguarding national stability.

**End of Report**

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