# 2024: What to Expect

Welcome to the new year, and to our annual primer on what to expect in the Asia-Pacific.

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2024 promises to be a tumultuous year, not the least because of a host of elections across the region, from presidential contests in Taiwan, Indonesia, Sri Lanka, and the United States, to general elections in Bangladesh, India, Pakistan, and the Solomon Islands, and legislative polls in South Korea. Japan and Singapore could join that list, if their ruling parties decide to roll the dice on snap elections. These votes will serve to recast the political class across Asia, with possibly significant consequences.

Amid the churning in Asia's political pools, there are worrying economic tides too. China's economy is in dire need of a boost but foreign companies remain wary of Beijing; meanwhile, Southeast Asia's "scamdemic" is truly a global problem. Afghanistan remains mired in poverty and hunger as the international community debates how to handle the Taliban regime, and Pakistan's economy is teetering between recovery and crisis.

And there are a number of festering conflicts across Asia, from Myanmar, where a coordinated resistance offensive took shape in the latter part of 2023, to the South China Sea, where the Philippines, most prominently, is facing off against China. At the same time, crises in the Middle East and Europe continue to sap American attention and alter wider geopolitical trends. If 2023 was a rollercoaster, 2024 promises to be a continuation of that wild ride, from Central Asia all the way to the Pacific.

## United States

— Ankit Panda

**Will Joe Biden be reelected by U.S. voters, or will Trumpism return to American foreign policy?**

No question will be of greater consequence concerning the U.S. role in Asia than the outcome of its November 2024 presidential election. America's allies, partners, and adversaries in the region will all closely study the possibility that Trumpism, if not Donald Trump himself, may return to the fore of U.S. foreign policy, derailing the Biden administration's efforts since 2021 to restore a more traditional approach to the region.

For U.S. allies like South Korea, Japan, and Australia, the election will be a barometer for whether Washington can be treated as a predictable and reliable partner. The Biden administration's many efforts at advancing these relationships – through the U.S.-South Korea Washington Declaration, the U.S.-South Korea-Japan trilateral, and the historic AUKUS defense industrial partnership – may not survive a political transition in Washington.

For China, the prospect of the reelection of Donald Trump, or even one of his less likely competitors like Nikki Haley, could foreshadow a return to greater confrontation and strife in the bilateral relationship. While the Biden administration accepts that competition with China must be responsibly managed by both sides, Republicans in the United States are more broadly willing to assert American power in Asia in ways that could prompt an overreaction by Beijing.

While every U.S. presidential election is uncertain nearly a year out from the day American voters head to the polls, the 2024 election appears especially so. Will Trump's legal jeopardy prove disqualifying, prompting the Republican Party to rally around a candidate like Nikki Haley, with foreign policy views somewhat closer to a traditional pre-Trump neoconservative? The answer to this question may not be known until mere months before the election, but will have major consequences for both the election and the prospects of a transformed U.S. approach to Asia.

There is at least one major policy area, however, where Asian states can expect continuity from the United States, no matter what. This concerns trade policy, where neither major party in the United States exhibits any appetite for a return to a more liberalized trade policy favoring globalization.

**Will crises in Europe and the Middle East continue to take much-needed oxygen away from Asia policy?**

2023 made clear that the United States does not have the luxury of making good on the Biden administration's earlier promises to place the Indo-Pacific at the forefront of its national security priorities. Russia's war on Ukraine continued, drawing much-needed bureaucratic energy and resourcing away from Asia.

The eruption of the Israel-Hamas war in October 2023, meanwhile, thrust the Middle East back onto the top of the agenda in Washington, despite Biden's attempts to extricate the United States from the region. As 2024 begins, the Biden administration will be especially wary of the domestic political consequences of both of


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these major crises, which could color the United States' willingness to commit greater energy to Asia.

**Sustaining momentum on crisis communications and engagement with China.**

After months of emphasizing the importance of "guardrails," the Biden administration ended 2023 with positive signs on the military and crisis communications front with China. Beijing had suspended several exchanges after the 2022 visit to Taiwan by then-U.S. Speaker of the House Nancy Pelosi, but Biden and Xi were able to agree on restoring those channels.

2024 will provide an important test of the durability of this rapprochement, which has even seen the restoration of several processes that had been suspended since the Obama administration, such as high-level consultations on arms control. States in Asia will watch closely to see if the region's two major superpowers can manage their competition and confrontation with dialogue, or whether they will find themselves once again pulled apart.

Much will depend on Chinese behavior in Asia, and whether politics in Washington leading up to the 2024 presidential election compels a return to competitive dynamics between the two countries. As both sides learned in the final months of 2022, when Biden and Xi met in Bali, Indonesia, rapprochement can be quickly derailed: A Chinese high-altitude surveillance balloon detected over the United States in February 2023 plunged relations back into confrontation and mistrust. 2024 may hold similarly unanticipated developments that could test the durability of the latest attempt at righting the U.S.-China ship.

## Japan

— Yuki Tatsumi

**Can Kishida stay in office?**

After peaking at 46 percent in the wake of the successful G-7 Hiroshima Summit in May 2023, Japanese Prime Minister Kishida

Fumio's approval rating has been in freefall for the last six months. The most recent poll released by the Nihon Hoso Kyokai (NHK), Japan's public broadcaster, on December 11, indicated that his approval rating had hit a new low of 23 percent, while 58 percent do not approve. That's a sharp 13-point drop from only two months ago.

Kishida's government was already plagued by voter frustration on inflation and concerns over the safety of private information associated with their "My Number" (Japan's rough equivalent of a Social Security Number). The recent scandal involving Cabinet members and senior Liberal Democratic Party (LDP) officials' dubious financial reporting accelerated the loss of public support.

Ironically, this final nail on the coffin to Kishida's approval rating came from the wrongdoing of Cabinet ministers who belong to the late Prime Minister Abe Shinzo's faction. The revelation that the Abe faction benefited from fundraising events by underreporting their revenue to tax authorities exposed how widespread such behavior has become among LDP politicians, and how out of touch they are from ordinary voters in Japan.

Kishida was forced to replace a number of senior members of his Cabinet, including the chief cabinet secretary and minister for economy, trade and industry, with Diet members that do not belong to the Abe faction. Even the refreshed lineup of Cabinet ministers did not seem to help Kishida regain his approval rating.

To be fair, the Japanese public was never energized about Kishida. But as he began his tenure, he leveraged his public image as sincere, humble and steady politician. As those images fade in the face of the emerging problems within his government and party, he will enter 2024 at a time when his future as the prime minister of Japan is quickly dwindling.

**When will Japan have its election?**

The current term of Japan's House of Representatives, the lower house of the Diet, will end in October 2025, that date is latest that Japan's next election can happen. With Kishida's approval rating tanking, though, the growing question is whether there will be a lower house election in 2024 – and if so, when?

Such speculation often begins to swirl as the prospects for the sitting prime minister to stay in power narrows, as one of the ways a leader can attempt to revitalize their power base is by dissolving the lower house, calling for an election, and leading their party to victory. According to this theory, Kishida ought to dissolve the House of Representatives and call for an election in early 2024, in the hopes of strengthening his position before the LDP's internal leadership race in September.

In Kishida's case, however, it is increasingly uncertain that calling for an early election will help him. In fact, many point out that Kishida missed his best chance for dissolving the lower house earlier in 2023 after successfully hosting the G-7 Summit in Hiroshima. With his approval rating hitting a record low as the year ended, officials in the LDP worry that if he calls for an election now, the LDP will end up losing seats.

Some argue that there is still well over a year before the current lower house terms end, so there is a possibility that unexpected developments might boost Kishida's approval rating, putting the LDP in a stronger position to face an election. The problem for the LDP, though, is that no one knows what those development might be. Unless the situation changes, the ruling coalition might face a worst-case scenario – Kishida muddles through as his approval rating continues to drop, and the party goes into the election as the lower house term concludes in October 2025 from a position of weakness.

**Who can be the new prime minister of Japan?**

If Kishida's days as prime minister are numbered, who is ready to take his place? The answer to this question is exactly what is helping Kishida stay in power.

That answer is – no one, really.

Of course, there are a few politicians that stand out in the court of public opinion. Former Defense Minister Ishiba Shigeru, the sitting minister in charge of digitization, Kono Taro, and former Environmental Minister Koizumi Shinjiro are among the top candidates for the job in the eyes of the general public. All of them share a public image of going against the party establishment and rebelling against the status quo – despite their experience serving in past (and present, in the case of Kono) LDP-led coalition governments.

The problem is that precisely because of their natural tendencies to go against the grain, none of them has a strong enough base within the LDP to rise to the top. There are others – such as Fukuda Tatsuo, former parliamentary vice defense minister – currently serving in the LDP leadership who have both a solid support base within the party while also holding great potential to reach beyond the LDP with their vision for Japan's future. However, neither the late Abe, former Prime Minister Suga Yoshihide, nor Kishida has put effort toward nurturing these talents as leaders of the future LDP.

As a result, the LDP today finds itself in a bind. The party is extremely frustrated with its current leader, but there is no great prospect that appeals to the public as the next generational leader of the LDP. The party will therefore have a tough choice to make in September 2024, when Kishida will be up for re-election as the LDP president – which also translates to holding the prime minister post, given the LDP's legislative majority. Will Kishida retain his post, or will a rival candidate prove able to consolidate support?

## Koreas

— Troy Stangarone

**Elections in South Korea and the United States.**

Elections in South Korea and the United States in 2024 may be the most consequential in years for the Korea-U.S. alliance and the broader relationship.

South Korean President Yoon Suk-yeol's People Power Party (PPP) currently holds a minority in the National Assembly; the opposition Democratic Party of Korea and aligned parties control 182 seats in the 300-seat legislature. While the opposition is expected to lose some seats in the April 10 elections due to the current size of its majority, the question for the Yoon administration is whether the PPP can retake the Assembly.

If the PPP were to win a majority, it would provide Yoon the ability to fully pursue his policy agenda; however, if the Democratic Party of Korea is able to maintain control, as is currently expected, they will be able to sustain a brake on the Yoon administration's agenda.

While South Korea's National Assembly elections will largely determine the domestic influence of the Yoon administration, elections in the United States could have much more profound implications for the Korea-U.S. alliance. Former senior Trump administration officials have noted that then-President Donald Trump had considered the complete withdrawal of U.S. troops from the Korean Peninsula toward the end of his term in office. Should he win in 2024, a second Trump administration may again push for some level of troop withdrawal; at the very least, he will likely remain skeptical of the value of the alliance for the United States.

Beyond security cooperation in the alliance, a second Trump administration could have significant implications for the economic relationship. Former Trump administration officials have signaled that they would undo the Inflation Reduction Act in a second term, undermining South Korean investments in the production of electric vehicles (EVs) and EV batteries in the United States. An even harder line on China's semiconductor industry could have negative implications for South Korean semiconductor production in China.

**Russian technology transfers to North Korea.**

The Korean Peninsula has quietly become a critical focal point in the war in Ukraine. The Washington Post reported that in 2023 South Korea supplied more artillery to Ukraine than all of Europe combined, while trade date shows that Seoul has also significantly cut back on its energy imports from Russia. Not to be outdone, North Korea has become a significant exporter of artillery to Russia and has publicly supported Moscow's war effort in Ukraine.

Throughout the war, Moscow has threatened to provide North Korea with advanced military technology should South Korea supply weapons to Ukraine and the Putin-Kim summit in September strongly suggested that transfers of some military technology were on the table. South Korean intelligence has indicated that after the summit Russia provided North Korea an analysis of its two prior failed satellite launches, aiding a successful third launch.

Pyongyang is known to be interested in advanced technologies such as reconnaissance satellites, missile technology, and advanced fighter jets. How much artillery and what Russia provides in exchange for North Korean support will be one of the key issues for the war in Ukraine and the security situation on the Korean Peninsula in 2024.

**South Korea takes steps to shape global AI rules.**

With the launch of ChatGPT, artificial intelligence (AI) has become an area of focus for public policymakers. ChatGPT's launch and recent breakthroughs by Google's DeepMind in discovering 2.2 million new crystalline structures have demonstrated AI's potential to benefit humanity as a labor-saving and research tool.

However, growing AI capacity could also present a danger in a variety of fields including cybersecurity, biotechnology, finance, and disinformation if intentionally misused or improperly designed. Its adoption more widely in autonomous defense systems also presents risks for public safety.

In 2023, South Korea began taking a more prominent role in the development of norms and rules for AI. In September, the government announced a Digital Bill of Rights that it hopes will be adopted by businesses and governments for AI. It also co-hosted the United Nations' Joint Conference on Disarmament and Non-Proliferation, which focused on the use of AI in the military domain.

In November 2023, South Korea took part in the United Kingdom's AI Safety Summit, where it called for the establishment of a U.N. organization to oversee AI. The summit was designed to discuss how to safely use artificial intelligence and how best to regulate it. In May 2024, South Korea will co-host with the United Kingdom a second virtual summit designed to assess progress made on follow up measures to the inaugural summit. This will provide Seoul with an opportunity to continue shaping the evolving rules and norms for the future use of AI.

## China

— Shannon Tiezzi

**Taiwan elects a new president.**

On January 13, 2024, Taiwanese voters will go to the polls to elect a president and new members of the Legislative Yuan. With current President Tsai Ing-wen not eligible to run due to term limits, it's guaranteed that Taiwan will have a new president. The big question is who it will be: Tsai's vice president, William Lai, the Democratic Progressive Party (DPP) candidate; Kuomintang (KMT) pick Hou Yu-ih, or Taiwan People's Party (TPP) founder Ko Wen-je.

At the moment, the race is Lai's to lose – not because he's particularly popular (he isn't, with anti-incumbent sentiment weighing him down), but because the opposition vote is being split between Hou and Ko. As of December 20, the Taiwan News weighted average of the major polls had Lai in first place, with a scant 34.3 percent support, Hou close behind at 30 percent, and Ko at 20.8 percent.

Cross-strait relations is a huge piece of the race, with the KMT framing the election as a choice between "war" and "peace" and the DPP accusing the KMT of a willingness to sell out Taiwan to China. Beijing has not been subtle about its preferences, with spokespeople from the Taiwan Affairs Office echoing the "war vs peace" framework.

If the polls hold, and Lai is elected, the big question is how Beijing will respond. Despite Lai's previous pro-independence statements, he's promised to continue Tsai's policy of maintaining the status quo. Given he will fall far short of a popular mandate even if he wins, we can be confident that he's not going to dramatically upend cross-strait relations.

But China might, if Lai's victory – despite the DPP's overall unpopularity at the moment – is taken as a sign that Beijing's favored party may never return to power.

**China's economic "charm offensive" put to the test.**

2023 ended with a serious push by Chinese leaders to attract foreign businesses back to China. President Xi Jinping made a point of meeting with U.S. business leaders during his trip to California in November, and sought to reassure European companies at the China-EU summit in December.

There's good reason for that: China's economy is in dire need of a boost. While the lifting of COVID-19 restrictions in late 2022 helped, the rebound was short-lived and not as extensive as Chinese policymakers had hoped. The stress of the pandemic uncovered long-buried issues in China's economic model, from a real estate bubble to an over-reliance on local government stimulus. Meanwhile, Chinese consumers are reluctant to open their wallets to provide an additional source of economic growth. As a result, the International Monetary Fund (IMF) expects China's growth to fall from an estimated 5.4 percent in 2023 to 4.6 percent in 2024.

The negative trend has been exacerbated by a marked loss in foreign confidence in China's economy. Even China's official data showed that foreign direct investment turned negative in the third quarter of 2023 – meaning that more money left China than entered the country, something not seen since data collection began in 1998.

Xi and his ministers are pushing hard to rectify that trend, but welcoming rhetoric only goes so far. With foreign companies increasingly fearful of government control over their business operations in China – and even threats to their staff amid a new wave of national security-themed legislation – Beijing will need to take concrete steps to actually woo foreign businesses back. So far, Xi has been reluctant to do that. 2024 will be the real test for his economic charm offensive.

**China-Africa relations in the spotlight.**

Sometime in late 2024 – the exact date is yet to be set – Beijing will host the ninth iteration of the Forum on China-Africa Cooperation (FOCAC). The triennial leader's meeting will bring together heads of state and government from across the African continent and set the tone for Africa-China relations for the next three years.

Much is riding on the 2024 edition of FOCAC. The 2021 forum was largely a bust; though much of the world had reopened by then, China had not. With Xi not willing to attend, the entire gathering was downgraded to the ministerial level, a major disappointment to host Senegal. This year, the forum is back on Chinese soil (the venue alternates between China and an African country) so we can be assured Xi will attend.

Most African leaders will as well, as opportunities to meet with China's president have grown scarce lately. Even after COVID-19 restrictions in China ended, Xi's international travel has been sharply curtailed compared to pre-pandemic, and he skipped the broader tour of Africa that we might have expected following his visit to South Africa for the BRICS summit in 2023.

All told, Africa-China relations are badly in need of a fillip. Prevailing narratives have turned sour, with increased concern about debt traps, driven by Zambia's default, and (somewhat paradoxically) perceptions that China is less interested in providing funding to African states. The lack of high-level visits from Chinese officials has not helped. FOCAC 2024 is a chance to reset the tenor of Africa-China relations at a time when the Global South is finally gaining its rightful importance on the international stage.

## India

— Sudha Ramachandran

**Narendra Modi poised to return for a third consecutive term.**

India will vote in its 18th general election in 2024. While the election schedule has yet to be announced, voting is likely to be held in multiple phases over several weeks in April-May.

The Bharatiya Janata Party (BJP) is expected to return to power, albeit with a smaller majority in Parliament. The inauguration of the Ram temple on the site of the demolished Babri Masjid in

Ayodhya in January will set the stage for the party's election campaign. Hindutva triumphalism will be on show. The BJP can be expected to stir up Hindu-Muslim communal polarization in the country to solidify its support base among the Hindu majority.

The party's coffers are overflowing and Prime Minister Narendra Modi, who remains immensely popular across the country, will lead an aggressive, high-decibel campaign across the country. Instead of seeking votes for individual candidates, as is the norm in parliamentary elections, the campaign will focus on pushing for a third term for Modi. Expect a no-holds-barred taunting of the Nehru-Gandhi family and Muslims.

While the Indian National Democratic Inclusive Alliance (INDIA), a newly formed bloc of opposition parties, showed early promise, infighting has already undermined its prospects. Whether it will hold together in its present shape until the elections is doubtful.

The Congress party's significant losses in recent assembly elections in the crucial "Hindi heartland" states have damaged the Grand Old Party's hopes of leading the INDIA bloc. Its strategy for taking on the BJP as well as its rivals within INDIA will be important. Will the Nehru-Gandhi siblings persist with Modi-bashing, which has not yielded results in elections? Or will they campaign on an alternate vision for India? Importantly, will opposition parties opt to mimic the BJP's strategy of appealing to communal sentiments to attract votes?

**Will 2024 be the year Jammu and Kashmir gets an elected government?**

The Modi government is expected to call for assembly elections in Jammu and Kashmir (J&K) in 2024. It had previously said that assembly elections in J&K would be held after the delimitation of electoral boundaries and the updating of electoral rolls was done. These tasks were completed over a year ago.

Importantly, on November 11, while ruling that the Modi government's August 2019 decision to revoke J&K's autonomy was constitutionally valid, India's Supreme Court called for the restoration of J&K's statehood – it was stripped of statehood and made a union territory when its autonomy was revoked – and holding of state assembly elections by September 30, 2024.

Although the Modi government claims that the security situation has improved and that militancy has declined in J&K, a string of recent encounters between security forces and militants are a cause for concern. It will nevertheless be difficult for the government to cite the security situation as an excuse to avoid holding assembly elections in 2024.

Whether the government holds assembly elections in J&K during the nationwide general elections or separately remains to be seen. Whether the Election Commission will feel confident about ensuring violence-free elections in J&K when security forces will be already stretched nationwide during the general elections will be an important point that will factor into the decision.

**Post-elections, India could reach out to Pakistan.**

In the first half of 2024, its domestic electoral agenda will dictate the BJP government's diplomacy abroad. An important part of the BJP's propaganda for decades has been to project itself as an uncompromising guardian of India's national security interests, and to this end, the Modi government has adopted muscular, even aggressive postures, especially vis-à-vis Pakistan. This has proved to be electorally rewarding in the past. Noteworthy in this regard were the air strikes on Balakot in Pakistan ahead of the 2019 general elections in response to the terror attacks at Pulwama in February of that year.

The Modi government can be expected to engage in some muscle-flexing and tough talk vis-à-vis Pakistan. It will also project a tough stance vis-à-vis Western powers in relation to allegations of an Indian assassination program abroad. The BJP will not want to be seen by voters to be cowing to Western pressure.

Once the elections are done, however, the new government in New Delhi can be expected to reach out to Islamabad. Pakistan will also have a new government by then. If assembly elections are held in J&K and an elected government is in place, it will make it easier for the new Pakistani government to engage with New Delhi. With new governments in place in both New Delhi and Islamabad, the space for bilateral talks will open in the second half of 2024. Whether the talks will last or prove fruitful is another matter entirely.

## Pakistan

— Umair Jamal

**Pakistani elections will be crucial for ties with India.**

Pakistan's general election in February 2024 will be a significant event. In addition to having far-reaching implications for the country's political and economic stability, it will impact Pakistan's foreign policy, particularly ties with India.

It is conceivable that policymakers in Pakistan are eyeing these elections as an opportunity to initiate talks and negotiations, aiming to improve relations with neighboring countries. The post-election scenario in both India and Pakistan offers a unique opportunity for dialogue and potential breakthroughs in their bilateral relations. Nawaz Sharif, the supreme leader of the Pakistan Muslim League-Nawaz (PML-N), who is poised to return to the prime minister post, has expressed hopes to normalize ties with neighboring countries, particularly India.

What is interesting to note is that this sentiment seems to be echoed in Rawalpindi, the headquarters of Pakistan's powerful military. The military's assessment of policies for economic benefits rather than military adventures indicates a shift toward prioritizing peaceful relations with India.

This convergence of intentions from both the political and military leadership opens up new possibilities for dialogue and cooperation between the two countries. By initiating meaningful discussions, there is a real chance to achieve tangible outputs that can benefit both nations economically and diplomatically.

**SIFC's broad remit has implications for the economy and governance.**

The establishment of the Special Investment Facilitation Council (SIFC) in Pakistan marks a significant turning point in the country's governance and economic landscape. With the authority to tackle roadblocks and bureaucratic hurdles that hinder foreign investments, the council has effectively taken over the responsibility of attracting investments and ensuring a smooth business environment

It is noteworthy that such powers have traditionally been associated with civilian bodies. However, the outgoing government’s willingness to acknowledge the military’s role in running things smoothly demonstrates a paradigm shift in Pakistan's governance approach. Given the challenges faced by civilian bodies in effectively governing and facilitating investments, the emergence of SIFC holds immense potential for driving economic growth and development. Its ability to navigate through obstacles, streamline processes, and attract foreign investors will be crucial for Pakistan's economic progress. On the other hand, as it expands into every sphere of governance, the SIFC body may run afoul of legal challenges, as well as affect the efforts of other civil bodies.

As we look ahead to 2024, it becomes evident that closely monitoring SIFC's work will be essential. The impact it can make on Pakistan's economy and governance cannot be underestimated. Whether this council will deliver positive results or encounter challenges along the way remains to be seen. Nonetheless, its establishment signifies a new era where both military and civilian entities are working together toward a common goal – fostering an environment conducive to investment and economic prosperity.

**The eviction of illegal migrants will have consequences.**

Pakistan’s decision to evict millions of illegal migrants, particularly Afghans, is a subject that will have a significant impact on the country’s economy, security, and ties with Afghanistan’s present rulers. Despite facing immense pressure from within and outside,

Pakistan has taken a firm stance on the issue.

In 2024, it seems that Pakistan will push to expand its eviction campaign and incorporate a more robust registration and tracking process to ensure that new migrants are monitored closely. This policy shift will undoubtedly have far-reaching consequences for the country.

The Afghan Taliban, who govern the neighboring country, have opposed the idea of expelling Afghan citizens from Pakistan and cautioned that doing so might make Pakistan more enemies inside Afghanistan. Pakistan's intention to carry out the deportations may lead to greater miscommunication between the two sides and possibly more security issues for Pakistan.

It will be crucial to closely observe how this decision impacts Pakistan's stability. The economic implications of such a move cannot be overlooked, as it may lead to changes in labor markets and potential disruptions in various sectors.

The development will have a direct impact on Pakistan's political and economic stability in 2024, therefore it would be important to keep an eye on how things turn out on this end.

## Afghanistan

— Shanthie Mariet D'Souza

**Is the Taliban's anti-poppy campaign sustainable?**

Following a pledge by the Taliban to eradicate the drug cultivation industry and an official ban on opium cultivation in April 2022, the UNODC in early November 2023 reported a drastic reduction of 95 percent in opium cultivation in Afghanistan. Given the fact that Afghanistan was the world's biggest opium producer and a major source of heroin in Europe and Asia when the Taliban seized power in August 2021, these gains may very well be unsustainable and therefore reversible, for two reasons.

First, Afghan farmers have registered a loss of more than $1 billion due to the Taliban's enforcement of its anti-poppy edicts. They will find it extremely difficult to absorb the shock of the significant contraction of the opium economy without humanitarian assistance and strong investment in agriculture and sustainable livelihood programs. The Taliban may decide to dilute the ban in the face of widespread hunger and poverty, which affects its acceptability among common Afghans.


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Second, the Taliban, in the past, generated significant revenue from opium cultivation and trade. So far the new regime has principally relied on aggressive tax collection and extortion to fund the Islamic Emirate. However, dwindling coffers may nudge it to revisit the policy vis-à-vis opium cultivation and trade.

Even if the policy remains unchanged as an attempt to showcase the Taliban's commitment to eradicate drugs and foot soldiers manage to enforce the ban in 2024, Afghanistan may still remain the biggest source of synthetic drugs such as methamphetamine. Seizures of synthetic drugs manufactured in Afghanistan have significantly increased and Afghanistan is emerging as the fastest-growing maker of meth. With the movement of drugs across porous borders, it will be a challenge to disrupt the political economy of conflict in Afghanistan.

**Will the Taliban sever links with transnational terror and jihadi groups?**

The Taliban have repeatedly assured regional countries and the international community that their government will prevent Afghan soil from being used by terror groups to target other countries. However, their actions have belied those pledges.

Successive reports by the monitoring committee of the United Nations have pointed to undisrupted linkages between the Taliban and al-Qaida, even though the latter's scale of presence within Afghanistan remains a matter of debate. At the same time, the Taliban's links with groups like Tehreek-e Taliban Pakistan (TTP), the Eastern Turkestan Islamic Movement (ETIM) and the Jamaat Ansarullah (JA) remain much more pronounced.

The Taliban have risked worsening bilateral relations with Pakistan to protect the TTP. The regime has merely relocated ETIM to areas away from the borders with China. The JA, otherwise known as the Tajik Taliban, has reportedly been used by the Taliban to harry Tajikistan.

At the same time, the Taliban's top leadership has been nearly silent on the war between Israel and Hamas in Gaza, merely calling for a resolution of the crisis, without expressly supporting Hamas. This indicates the Taliban's tactical reluctance to be directly involved in external conflicts, though this could change if the conflict intensifies.

The Taliban are, however, still unwilling to break the symbiotic nexus they formed with a dozen terror groups over the past two decades, whom Taliban leaders consider instruments of leverage against regional countries. At another level, the Taliban are apprehensive of losing control over these groups and facilitating their shift in allegiance to the Islamic State Khorasan Province (ISKP) by pursuing an overtly restrictive approach.

Although sanctuaries available to these groups in Afghanistan, if not addressed, pose regional and even global security threats, the Islamic Emirate is unlikely to heed requests to sever ties.

**Taliban factionalism and managing the potential for implosion.**

While the dominance of the Taliban hardliners (the Kandahari shura), led by the group's supreme leader Hibatullah Akhundzada, over the moderates has been firmly established, factionalism within the hardliners themselves may pose a significant challenge to the Islamic Emirate in 2024.

The faction of interest in this regard is the Haqqani Network, which occupies influential ministries in the interim cabinet. Contrary to some of the changes in the cabinet that have seen moderates shunted out or their role diminished, the Haqqanis remain untouched, indicating the influence they wield within the umbrella organization.

However, even the Haqqanis have been made to bow to the overall policy dictated by the Kandahar-based top Taliban leadership. For instance, the Taliban have adopted an extremely antagonistic hardline approach against Pakistan on the issue of Durand Line, the expulsion of Afghan refugees, and the TTP's sanctuaries within Afghanistan, despite the proximity the Haqqanis share with Islamabad. Further, the Haqqanis had to relent to Kandahar's preference for banning girls' education and denying women the right to work.

On at least one occasion, the frustration of Interior Minister Sirajuddin Haqqani found expression, as he criticized Akhundzada for "monopolizing power," and asserting that the "situation can no more be tolerated" back in February 2023.

The Taliban's top leadership managed to silence him by allowing Haqqani complete freedom over methods to quell domestic dissent, including calming Panjshir, the epicenter of the anti-Taliban resistance movement. Will the top leadership be able to manage the power struggles within the Taliban and address the growing threat of ISKP? Will the Haqqanis assign precedence to unity over the continued withering away of their authority? These remain the key challenges for the Islamic Emirate.

## Central Asia

— Catherine Putz

**Kyrgyzstan's troubling trajectory.**

Kyrgyzstan was once referred to as an "island of democracy," a state ostensibly floating in an autocratic Central Asian sea. That was never quite true, but as an aspiration it drove, in part, three revolutions in the country – in 2005, 2010, and 2020. The last brought to power the Sadyr Japarov-Kamchybek Tashiev tandem, which has been widely criticized for shoving Kyrgyzstan firmly down the slippery slope toward authoritarianism by jailing political opponents, undermining the judicial system, and pressuring media to stick to the government line, or else.

Japarov's term technically runs until 2027, but there is a veritable flock of black swans on the horizon that may cut his presidency short. It's impossible to predict precisely what may set off revolutionary protests in Kyrgyzstan, but the short list for 2024 includes: an unexpected but ultimately predictable power failure in winter or severe energy or water shortages in summer; unrest over delayed but still looming tax reforms viewed as putting the squeeze on market merchants; a breakdown in relations with Tajikistan over the border, either before or after a much-anticipated final agreement is announced; or yet another in a long catalog of investigative reports highlighting corruption in the upper political echelons of Kyrgyzstan at a time when the Japarov-

Tashiev tandem has promised to crack down on corruption and organization crime.

There is no shortage of pinch points for the powers that be in Bishkek. While the Kyrgyz may not always conduct their democracy in an orderly electoral fashion, they seem to get the central gist: If you don't like the guy at the top, get a new one. Japarov and Tashiev may go to extremes to forestall that bit of repeated Kyrgyz history, further putting pressure on political opponents and the media, and using the country's prime geopolitical position between Russia and China to escape criticism from the West. History doesn't repeat, but old habits die hard.

**A game of corridors, unions, and roads.**

The Middle Corridor is having a moment, and Russia's desired gas union is underway. The China-Kyrgyzstan-Uzbekistan railway, however, faces a money major hurdle. In 2024, there will be plenty of infrastructure and energy projects to track.

Also known as the Trans-Caspian International Transport Route, the Middle Corridor is a loosely defined trade network charting a course from China through Central Asia and the Caucasus and on to Europe. Narratively, it has something to offer all major players involved: For Europe, it avoids Russia; for China, it eschews traditional shipping routes through the South China Sea and the Indian Ocean, where pesky American warships patrol proclaiming freedom of the seas. For Central Asia, it puts the region at the center of global trade once again. It's not a new idea – Turkey first floated the concept in the early 2000s – but it may be an idea whose time has come.

The gas union between Russia, Kazakhstan, and Uzbekistan came together in the latter part of 2023 with Uzbekistan finally starting imports of gas from Russia via Kazakhstan in October. Under a two-year deal, Uzbekistan will import 9 million cubic meters of Russian natural gas per day – 2.8 billion cubic meters annually – to cover winter shortages. It's the first time Uzbekistan, which has considerable gas reserves of its own, has imported gas from Russia. Moscow reportedly wants to expand the project.

There was considerable coverage of the China-Kyrgyzstan-Uzbekistan railway early in 2023 as the three countries appeared to finally agree on a route. But they haven't agreed on much else, in particular how to finance the project. Neither Kyrgyzstan nor Uzbekistan can fund the necessary construction of railways through Kyrgyzstan, and it seemed by late 2023 that the project wasn't really a priority for Beijing. What becomes of the CKU railway in 2024 may be a barometer for Chinese investment in the region.

And there are many other projects to track, too, from wind farm developments in Kazakhstan in partnership with countries as diverse as France and the UAE; to any hint of progress on the construction of a nuclear power plant in Uzbekistan with Russian assistance; to further work on Tajikistan's Rogun dam; and, of course, the Taliban's Qosh Tepa canal.

**Central Asia at the center of geopolitics.**

The above trends – whether Kyrgyzstan's democratic deterioration or the vast array of infrastructure and energy projects on the docket – are all occurring under the ever-present cloud of geopolitics.

The Middle Corridor, for example, is often cast these days as part of the push to cut Russia out of polite international society (and the global economy) and that perception colors Western understanding of enthusiastic Central Asian participation. But that ought to be tempered by other developments, such as the gas union and sustained political ties between Russia and the region.

As these separate, but geopolitically parallel, developments unfold in 2024, they'll serve as a reminder that gauging Central Asia's position regarding Russia will never be a simple question of sides, but a complex tangle of interests and needs. (The same goes for China.) This will be evident, perhaps most prominently, in the enactment – or continued withholding – of large-scale sanctions on Central Asian companies or governments.

The region is a prominent node in Russian efforts to evade sanctions; no one is surprised by this. But the longer the war in Ukraine goes on, the more difficult it will be for regional governments to promise both comprehensive trade relations to Moscow and sanctions enforcement to Washington and Brussels.

2023 felt like a record-setting year for foreign visits to the region and prominent meetings abroad for regional leaders. The coming year may or may not keep that pace. It seems unlikely that U.S. President Joe Biden would again meet Central Asian leaders on the sidelines of the U.N. General Assembly in September. And Chinese leader Xi Jinping won't be attending another China-Central Asia summit until 2025. How major powers attempt to sustain their engagement with Central Asia will be important to watch as 2024 progresses.

## Mainland Southeast Asia

— Sebastian Strangio

**Myanmar: The beginning of the end?**

Coordinated resistance offensives in the closing weeks of 2023 raise the prospect that 2024 could be the year that Myanmar's military government finally stumbles.

In late October, the Three Brotherhood Alliance of ethnic resistance groups launched Operation 1027, attacking junta outposts along a wide front in northern Shan State. The Alliance, which includes the Myanmar National Democratic Alliance Army (MNDAA), the Ta'ang National Liberation Army, and the Arakan Army, made swift progress, dealing the military junta its biggest blow since the coup of February 2021.

Within six weeks the Alliance had overrun more than 200 military outposts across northern Shan State, seized large stocks of ammunition and military equipment, occupied strategic highway junctions, and seized a number of important border crossings with China. MNDAA forces also surrounded Laukkai, the capital of the Kokang Self-Administered Zone, from which they were expelled by the military in 2009.

Crucially, the offensive was met by passive acceptance from China, which has reportedly grown frustrated by the military junta's unwillingness to shut down the large-scale online scam operations that have flourished in Kokang under the region's current junta-aligned leadership.

Operation 1027 has been followed by subsidiary offensives in other parts of the country, including in Kayah, Rakhine, and Chin states, as well as Sagaing Region. These multi-front challenges in November prompted the military-appointed president, Myint Swe, to say the country "will be split into various parts."

How Myanmar's military leadership will respond to these setbacks in 2024 remains unclear. While it still commands a clear advantage in firepower, the military is severely overstretched, almost universally reviled, and faces grave challenges in replacing its losses. It is too soon to declare victory for the Spring Revolution – but the coming year could bring changes in Myanmar, both for good and for ill, that could reverberate across the country and the wider region.

**Southeast Asia's "scamdemic."**

Among the biggest international stories in mainland Southeast Asia in 2023 was the explosion in organized criminal activity across the region. In particular, numerous media exposés (including in The Diplomat) focused on the cyberscam operations operated by Chinese criminal syndicates in loosely-regulated parts of Cambodia, Laos, and Myanmar.

These operations, which were established during the disruptions of the COVID-19 pandemic, target victims across the globe, and are sustained by armies of indentured workers: innocent jobseekers who were attracted by promises of clean and legitimate employment, only to be kept imprisoned and forced to operate various types of digital scams, often on pain of beatings, mistreatment, and torture.

The scale of these operations is terrifying. The United Nations cited "credible sources" claiming that at least 120,000 people in Myanmar and at least 100,000 in Cambodia "may be held in situations where they are forced to carry out online scams." It estimated that Southeast Asia's scam centers "generate revenue amounting to billions of U.S. dollars" per year.

As 2023 drew to a close, a crackdown on these operations was well underway, with the Chinese government finally awakening to the scale of the problem and pressing its Southeast Asian partners to take action. The authorities in Myanmar's autonomous Wa State handed over thousands of suspected scammers, while the Chinese authorities issued arrest warrants for known criminals inside Myanmar. Meanwhile, after Myanmar's resistance groups declared their intention to shut fraud factories, the military junta belatedly began its own repatriations of scammers to China. As the year drew to a close, similar crackdowns were ongoing in Laos and expected in Cambodia, where government-aligned tycoons have been linked to known scam operations.

The situation is complicated by the complicity of local officials and the proven adaptability of the region's criminal syndicates, but with the crackdown likely to extend into 2024, the coming year shapes as a crucial one for law and order in the lower Mekong region.

**Laos takes the helm of ASEAN.**

In early September, Indonesia's President Joko Widodo officially passed the chairmanship of the Association of Southeast Asian Nations (ASEAN) to Prime Minister Sonexay Siphandone of Laos.

Taking up the chairmanship for 2024, Laos will face a more daunting agenda than it did during its previous tenures in 2016 and 2004. The theme for the 2024 chairmanship – "Enhancing Connectivity and Resilience," to quote the official slogan – reflects long-standing Lao objectives: a desire to transform itself from a landlocked to a "land-linked" nation, and to strengthen an economy stumbling under a heavy burden of debt.

However, Laos will also be forced to grapple with less comfortable issues. The first is the growing friction in the South China Sea, which has once again risen to the top of ASEAN's agenda after a tumultuous year in contested waters. Over the course of 2023, China intensified its pressure against Philippine-held features in the Spratly Islands, resulting in a string of dangerous encounters with Philippine vessels. The tensions will put Vientiane in a tricky


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position, given its close relationships with both China and rival claimant Vietnam, its single formal security ally.

Then there is the thorny tangle that is Myanmar, where Laos will inherit the unenviable task of trying to implement ASEAN's flawed Five-Point Consensus peace plan. Unlike Indonesia, Laos has remained quiet about the country's conflict, taking a conservative interpretation of the bloc's "non-interference" principle.

ASEAN's new "troika" on Myanmar, which will include the current chair (Laos) alongside the last (Indonesia) and the next chair (Malaysia), will ensure a degree of continuity from Jakarta's more active approach. But if Indonesia failed to make much headway last year, the Myanmar challenge will strain Laos' diplomatic capacity in 2024.

## Maritime Southeast Asia

— Prashanth Parameswaran

**The policy implications of Indonesia's presidential elections.**

Indonesia will hold presidential elections on February 14, 2024. It's three-way race between ex-special forces commander and current President Jokowi's twice election opponent-turned-Defense Minister Prabowo Subianto; former provincial governor Ganjar Pranowo; and ex-Jakarta governor Anies Baswedan. With the new president not expected to be inaugurated until October 2024, much of the year will be filled with speculation about the extent of policy continuity and change under a new president relative to the Jokowi era.

Few expect a stark departure from Jokowi's main priority, which centers around developing Indonesia into one of the world's top economies by 2045 by advancing policies like commodity downstreaming and major infrastructure projects. Indeed, Jokowi has already sought to secure continuity in his legacy by paving the way for Prabowo to select Jokowi's eldest son, Gibran, as his vice president, thereby spotlighting the dynastic aspect of Indonesia's politics.

Nonetheless, there could be some adjustments to aspects of Jokowi's approach under a new president, including more caution regarding investment from China flowing into the country. There could also be more active presidential engagement in fora such as ASEAN or the United Nations relative to Jokowi's largely domestic and economic focused foreign policy.

Beyond approaches to individual issues, there will also be scrutiny on how Indonesia's new president structures decisionmaking and manages rising concerns in some quarters about democratic backsliding, economic nationalism, and the rising influence of more exclusivist forms of Islam.

**Intensifying tensions in the South China Sea.**

Tensions have flared over the past few months, particularly around Second Thomas Shoal, where Chinese vessels have routinely blocked Philippine ships and at times used water cannons and blinding lasers. In response, the Philippines has not only protested China's actions, but also quickly reinforced its alliance with the United States and strengthened security cooperation with partners like Australia, Japan, and South Korea. Manila has also tried to rally more forward-leaning ASEAN members to adopt a tougher stance against Beijing's maritime assertiveness.

Some may hope that 2024 will see mostly continuity, with bouts of Chinese coercion against the Philippines but with Beijing staying below the threshold that may lead to direct U.S. intervention and potential conflict. This cannot be assumed, however. The greater the number of incidents, the higher the likelihood of a potential accident or miscalculation. If Beijing starts deliberately dialing up the pressure on Manila even more, it will also give the administration of President Ferdinand Marcos Jr. even less room for maneuver on an issue that has already stoked nationalist sentiment.

In response, the United States could also look to step up its involvement, including more actively assisting the Philippines with resupply missions to Second Thomas Shoal that could in turn spark an aggressive response by Beijing.

**A planned leadership handover in Singapore.**

Singapore Prime Minister Lee Hsien Loong has said he will likely hand over power to his deputy Lawrence Wong before November 21, 2024 – the 70th anniversary of the ruling People's Action Party (PAP), which has governed the country since its independence. If this transfer does take place, it would be just the third change in leadership since Singapore's independence in 1965, with much of that period dominated by Lee's father and the country's founder Lee Kuan Yew. It would also mark the completion of a succession process that stalled at various points including during COVID-19 and when Lee's initial intended successor, Heng Swee Keat, stepped aside in 2021.

As this leadership handover takes place, all eyes will be on what Wong will inherit. He and other members of the so-called fourth-generation (4G) leadership have been warning about manifold foreign challenges threatening to disrupt Asia's growth story, including rising China-U.S. rivalry and the erosion of the rules-based order.

Meanwhile, at home, the PAP has been through a bit of a wobble in 2023 with a string of scandals in the middle of the year that Wong himself characterized as a "setback." Amid all of this, speculation will also continue as to when Wong will elect to call for polls due by 2025. Early elections would give him a fresh mandate to jumpstart his turn at the helm and institute any personnel or policy changes. While few expect anything less than another major victory for the PAP, the last polls in 2020 saw the opposition score the largest number of parliamentary seats in Singapore's history.

## Australia and Oceania

— Patricia O'Brien

**Geostrategic competition continues to shape the region.**

With increasing brinksmanship in the South China Sea reverberating throughout the Pacific in 2023, the best hope for 2024 is that the coming changes will be incremental and unaccompanied by conflict. Geostrategic competition will continue to dominate the region and manifest in myriad forms.

2023 saw a continuing surge of activity sparked by China's bold 2022 moves intended to bring all of the Pacific Island nations into the Sino-centric sphere. With a blizzard of agreements, announcements, and visits in 2023, a growing coalition of nations lined up to engage in the Pacific from those with old colonial ties, like Germany, to newcomers in the Pacific arena, like South Korea which held its first Pacific Islands Summit in May. Both Germany and South Korea joined the affiliation of nations coordinating their regional activities through the Blue Pacific Partnership headed by the United States.

Now it's time for nations to put more meat on the bones of all their undertakings shaped by Pacific needs. An array of infrastructure, economy-boosting, health, and human development projects will be one side of the duel for Pacific influence between China and nations allied with the United States. 2024 will be a year for partners to deliver.

For Pacific peoples, it is hoped this outreach will bring much-needed relief to the quotidian pressures of island lives, where global warming, rising seas, and dramatically altered weather patterns have eroded depleted fish stocks and undercut agricultural production and community economic foundations. These are pressures that reverberate throughout the region with an array of challenging consequences.

In 2024, Pacific peoples will no doubt continue to press the point, made now for many years, that their conceptualization of security relates not to China's expansion but to the climate crisis and the urgent need to adapt to a fast-changing environment that challenges hundreds if not thousands of years of self-sufficiency. The on-island challenges have pushed many into diaspora communities in New Zealand, Australia and the United States, where security challenges take a different form – low-paying and insecure work, poor housing, poor education, and the many social afflictions of impoverished communities.

2024 will no doubt see a continuation of these people movements that will bring challenges at both ends of the migration chain. The new conservative government in New Zealand will be watched closely for how it addresses significant challenges in its diasporic communities, and that will have reverberations throughout the region..

**How will new regional architectures impact the Pacific in 2024?**

In 2023, Australia announced it would expand working visas for the Pacific Islands, albeit at modest levels. While addressing acute labor shortages in Australia's agricultural sector, these visas will now come with opportunities to remain in Australia and build communities by allowing families to accompany workers.

Also notable was the announcement of the Falepili Agreement in November 2023 between Tuvalu and Australia, which allows Australian work and residential rights for Tuvaluans, "a human mobility pathway," in exchange for Australian defense rights over Tuvaluan territory and rights of mutual consultation and agreement on security-related matters.

The Falepili Agreement brings Australia into a formalized agreement with Tuvalu, one of the remaining "orphan states" in the region, as they are considered in policy circles. It compares with the Compacts of Free Association between the U.S. and Micronesia, the Republic of the Marshall Islands, and Palau, or the Cook Islands, Niue, and Tokelau, which have been "realm states" for New Zealand for decades.

The agreement, made without any consultation with either populace, echoes a troubling norm for a series of Pacific agreements since the September 2021 AUKUS Agreement. And it has sparked a strong response from Tuvalu's opposition, who pledged to campaign strongly against it. Tuvalu's national election in late January 2024 will indirectly put the Falepili Agreement to the nation's people. It will be a development watched very closely, either paving the way for similar Australian agreements with other Pacific nations (the likely scenario) or slowing the pace of Australia's agreements to stem regional antipathy.

**Pacific elections amid difficult domestic issues and the geostrategic overlay.**

As well as Tuvalu, there are several other elections slated for 2024 that will all be closely monitored. Kiribati, one of the "orphan states" whose shift to recognizing China in September 2019 elevated its importance for Blue Pacific Partners drastically, is a case in point. In 2023, President Taneti Maamau attended the second White House Pacific Leaders' Forum (he did not attend the first in 2022) and was the recipient of a sizeable Millennium Challenge Corporation grant to address the country's domestic challenges.

Interest in Maamau's political fortunes in 2024 will only be exceeded by those of the Solomon Islands' Manasseh Sogavare, who is finally due to face his electorate after he suspended the 2023 national elections in favor of hosting the Pacific Games. As the most concentrated, and as yet unchecked, location of China's Pacific power projection, the political winds in the Solomons will be a bellwether for the health of democracy in the region.

Chinese funds have proven critical for Sogavare to stave off no-confidence motions and political opponents since he switched his nation's allegiance to China in 2019. How parliamentary elections fare in the Solomon Islands with these corrosive influences is the high-stakes question hanging over 2024, if fair and free elections happen there at all.

Just over the Solomon Islands' northern border in Bougainville, democracy will likely be put to another test as pressure mounts on the Papua New Guinea parliament to act on Bougainville's independence. Port Moresby's inertia on this issue will likely change in 2024 due to pressure being applied by Bougainville's president, Ishmael Toroama.

Independence ambitions will also continue to roil New Caledonia and be echoed in French Polynesia in 2024. Australia's recent announcement of a repaired relationship with France that was fractured by AUKUS will complicate its position on this fractious issue going forward, with appearances being that Australia will favor retention of the status quo.

Australia's Bilateral Security Agreement with Papua New Guinea, announced in December 2023, seemingly also positions Canberra in Port Moresby's favor when it comes to Bougainville independence, a position consistent with Australia's intimate involvement with this issue for over 50 years.

All of these localized circumstances will impact regional cohesion in 2024, as will the divisive issue of deep-sea mining, which is, like virtually every corner of the Pacific, deeply inflected with the overarching geostrategic contest. Concern about conflict on local and great power levels will continue to dominate defense thinking. Increased and reconfigured security and military arrangements will continue to impact the region, all the while 80th commemorations of World War II battles are marked.

In 2024, the Pacific will continue to remember the disastrous events of 1944, while military powers ominously prepare for a new conflict.


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