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RUSSIA: Leveraging Taliban Relations Likely to Secure Access to Asian Oil Markets

Summary: Russian Foreign Minister Sergey Lavrov likely initiated formal cooperation with the Taliban to leverage relations and secure access to Asian oil markets. Strengthening trade agreements between Moscow and Kabul will almost certainly expand Russian access to Asia.

Development: On 5 October, Moscow convened the eighth Moscow Format Consultations on Afghanistan, hosting key regional governments including Beijing, New Dehi, Tehran, Islamabad, Astana, Bishkek, Dushanbe, and Tashkent, according to the *Associated Press*. Lavrov expressed opposition to external threats and economic sanctions against Kabul, according to the Ministry of Foreign Affairs of the Russian Federation. Lavrov called upon participating nations to expand regional trade and infrastructure with the Taliban administration. A separate bilateral meeting between Lavrov and the Taliban Foreign Minister Amir Khan Muttaqi focused on military-technical cooperation, according to the *Associated Press*. During their meeting, Lavrov and Muttaqi reviewed ongoing construction on the Turkmenistan-Afghanistan-Pakistan-India (TAPI) natural gas pipeline, according to the Ministry of Foreign Affairs. The pipeline serves as an independent export route for Central Asian gas that bypasses both Russia and Iran.

Analysis: Lavrov likely initiated formal cooperation with the Taliban to leverage relations and secure access to Asian oil markets. Moscow's stance as a mediator for Islamabad and Kabul likely stems from a desire to secure access to the TAPI pipeline corridor. Inviting Afghan representatives to the Moscow Format Consultations likely shows that Moscow effectively recognizes the Taliban as the governing authority of the country. Russian energy integration will almost certainly benefit Turkmenistan, Afghanistan, Pakistan, and India. Strong trade relations between Moscow and Kabul will almost certainly increase Moscow's access to Asian markets. Moscow's prior energy deals with Beijing will likely reinforce Moscow's drive for economic agreements with Kabul. Lavrov's firm stance against extra-regional military presence will likely elevate tensions between Moscow and NATO.

[Sophia Robbins]

SAUDI ARABIA: Mecca Pact Activation Likely to Bolster Defenses

Summary: The activation of the Mecca Joint Defense Agreement will likely strengthen Saudi Arabia's air defenses without expanding Turkish or Pakistani participation in offensive operations in Yemen.

Development: On 5 October, Riyadh activated the Mecca Joint Defense Agreement for the first time. Riyadh, Islamabad, and Ankara signed the pact on 7 August, treating an attack on one as an attack on all much like NATO's Article 5. A joint statement committed Ankara and Islamabad to provide forces and capabilities for rapid deployment to Saudi Arabia, but gave no troop numbers, units, or timeline. The meeting followed Houthi strikes on Saudi cities and oil facilities and came hours after Saudi-backed Yemeni forces launched a counteroffensive with air support from 100 coalition jets. On 8 October, Turkish Foreign Minister Hakan Fidan ruled out offensive operations and said military delegations are assessing contributions in air defense, electronic warfare, and technical support, according to *Reuters*. Turkey's parliament has not ratified the pact, and Ankara's aid so far consists of equipment, intelligence sharing, and weapons systems, according to a Turkish official. Islamabad had already deployed around 8,000 troops, one jet squadron, and an air defense system to Saudi Arabia under a 2025 bilateral pact, according to Arab News. Iranian media have since condemned the activation, according to *Iran International*.

Analysis: The activation will likely strengthen Saudi air defenses and signal regional backing for Riyadh but will likely not include Turkish or Pakistani combat roles or deter Houthi attacks in the near term. Ankara's public rejection of offensive operations will likely limit its role to defensive support, even after the agreement's ratification. Islamabad will likely keep its forces defensive to protect its mediator role with Iran. Turkish and Pakistani air defenders protecting Saudi cities and oil sites will likely free Saudi aircraft for Yemen operations, indirectly supporting the counteroffensive. The undefined force levels and timeline suggest the activation functions more as a deterrence signal to the Houthis and Iran than as an operational change, and Houthi strikes on Saudi Arabia will likely continue. Key indicators include a Turkish ratification vote, disclosure of force levels, and any Iranian or Houthi targeting of Pakistani or Turkish assets.

[Riley Callan]

CHINA: Military Leadership Purge Likely to Delay Taiwan Readiness

Summary: Beijing's expulsion of Central Military Commission (CMC) Vice Chairman Gen. Zhang Youxia and CMC Joint Staff Department Chief Gen. Liu Zhenli has left only two of seven CMC seats filled, which will likely delay the People's Liberation Army's (PLA) readiness for a potential Taiwan conflict beyond 2027. The Fifth Plenum, convening 26 -29 October, will likely include the Party ratifying the purge and closing the question of seats.

Background: Beijing expelled Gen. He Weidong, a CMC vice chairman, from the Chinese Communist Party (CCP) and the military in October 2025 and elevated Gen. Zhang Shengmin to CMC Vice Chairman the same month. Beijing placed Gen. Zhang and Gen. Liu under investigation on 24 January, and removed them from the CMC on 29 August, the same day Gen. Zhao Zongqi, the former Western Theater Command commander, lost his Chinese People's Political Consultative Conference (CPPCC) Standing Committee seat. Beijing formally expelled Gen. Zhang and Gen. Liu from the Party and military on 21 September, leaving the CMC with only two of its seven seats filled, according to *Al Jazeera*. The two had “formed cliques and factions” and acted “disloyal and dishonest,” according to *Xinhua* news agency. *PLA Daily*'s own commentary on the purge acknowledged “short-term difficulties and pains,” *Tracking People's Daily* translated. Approximately 101 generals are purged or missing and only 11 of 52 key command posts are filled, according to the Center for Strategic and International Security (CSIS) ChinaPower project. PLA response times to Taiwan-area exercises slowed from three to four days in 2024 to 12 to 19 days in 2025, while China-Russia joint exercises fell from 14 to six, according to CSIS. CCP General Secretary and CMC Chairman Xi Jinping publicly called the period “unusual and extraordinary” and described the purge as “revolutionary forging,” according to *Reuters*. Beijing has moved to backfill the vacancies, promoting People's Liberation Army Air Force (PLAAF) Commander Wang Gang and naming Wang Shuguang CMC Anti-Corruption Chief, according to *The Associated Press*. The State Council's 30 July announcement of the Fifth Plenum listed its agenda as “full and rigorous self-governance” without naming the military, Chinese government sources stated, though the September expulsions “will be confirmed by the CPC Central Committee when it convenes a plenary session” according to *China Daily HK*.

Vacancy Rate Likely Indicates Institutional Decapitation, Not Routine Turnover: A CMC operating at two of seven seats, alongside 101 purged or missing generals and only 11 of 52 key posts filled, almost certainly exceeds any threshold associated with ordinary leadership rotation, and the scale likely explains why *CSIS* analysts have described the body as “organizationally decapitated.” The purge’s roughly 11-month compression of Gen. He’s October 2025 expulsion and the September 2026 announcement removing Gen. Zhang and Gen. Liu likely outpaces the PLA’s capacity to vet and install replacements. Gen. Wang Gang’s and Gen. Wang Shuguang’s promotions likely represent initial efforts to restore senior military leadership but do not resolve the broader command vacancies or the vetting backlog. The compressed timeline also likely discourages lower-ranking officers from volunteering unfavorable assessments upward, a dynamic *CSIS* experts flagged as a risk of officers withholding bad news from Xi, which would compound readiness problems rather than surface them for correction. The purge’s internal logic, which *PLA Daily* framed as eliminating “major political hidden dangers,” suggests Beijing will likely prioritize political reliability over operational continuity in the near term, at the cost of command experience.

Slower Exercise Tempo Likely Pushes the 2027 Readiness Target Out of Reach: A quadrupling of PLA exercise-response times, from three to four days to 12–19 days, almost certainly reflects degraded coordination rather than a deliberate operational pause, and that degradation will likely compound the farther 2027 recedes from the purge’s resolution. The parallel decline in China-Russia joint exercises, from 14 to six, likely signals that the command vacancies will constrain PLA bandwidth broadly, not just Taiwan-specific planning, which would make the readiness slippage harder to reverse quickly. *Jamestown*’s reporting that Gen. Zhang favored pushing the 2027 goal toward 2035 suggests the purge itself may stem from a timeline dispute, meaning Gen. Zhang’s removal likely did not resolve the underlying disagreement so much as silence one side of it. That unresolved dispute likely leaves Xi’s preferred 2027 target without the institutional consensus needed to drive it, even as individual services continue operating. The persistence of discrete operations, such as the Southern Theater Command’s first WZ-7 drone mission over Scarborough Shoal in late September, indicates the PLA will likely maintain tactical pressure in the South China Sea to offset the appearance of institutional paralysis at the top. That gap between slowed collective readiness and continued unilateral

activity will likely widen through 2027, producing a PLA that remains active at the margins while falling short of the coordinated joint-capability benchmark Xi has set.

Fifth Plenum Framing Likely Signals Beijing’s Preference for Procedural Closure: Listing “full and rigorous self-governance” as the Fifth Plenum’s agenda item, without naming the military directly, likely reflects a deliberate choice to route the expulsions of Gen. Zhang and Gen. Liu through existing anti-corruption language rather than opening a separate, more visible debate over military policy failures. The Fourth Plenum’s October 2025 expulsion of nine generals in a single sitting establishes a direct procedural precedent, making it likely that the Fifth Plenum will ratify the expulsions of Gen. Zhang and Gen. Liu in a similarly brief, pre-scripted vote rather than through extended discussion. *China Daily HK*’s framing, that the Central Committee will confirm the expulsions rather than debate them, likely confirms the plenum’s function here is ratification of a decision already made, not deliberation over whether to make it. This procedural approach likely lets Beijing close the personnel question publicly while avoiding any plenum language that would validate Gen. Zhang’s reported timeline dissent, which would cause far more damage to Xi’s authority than the corruption framing alone. The dissenting view of retired U.S. Navy Capt. James Fanell, a former U.S. Pacific Fleet intelligence director, that the PLA remains “stronger than at any point in its history,” is likely the account Beijing would prefer to amplify once the plenum ratifies the expulsions. This view likely allows the Party frame the purge as a strength-restoring correction rather than a readiness setback. Formal closure at the plenum will likely not resolve the command vacancies themselves, meaning the procedural story and the operational story will probably continue to diverge well past October.

Outlook and Implications: Beijing’s purge of Gen. Zhang and Gen. Liu has left the CMC with only two of its seven seats filled and only 11 of 52 key command posts staffed, and that hollowed-out command structure will likely keep the PLA short of Xi’s 2027 Taiwan-readiness target. The Fifth Plenum will likely ratify the expulsions of Gen. Zhang and Gen. Liu without substantive debate, formally closing the political question while leaving the CMC’s vacancy rate and the 2027 readiness gap largely unaddressed. Ratification at the 26 to 29 October session will likely settle who is out without settling who decides, since the Party has framed the purge as anti-corruption discipline rather than as the dispute over the 2027 timeline that *Jamestown* reported

Gen. Zhang wanted pushed toward 2035. Beijing will likely continue backfilling senior posts incrementally, as with the promotions of Gen. Wang Gang and Gen. Wang Shuguang, rather than attempting a rapid wholesale reconstitution of the CMC. That incremental pace suggests Beijing will likely prioritize vetted political loyalty in each new appointment over speed, at the cost of leaving the CMC without the collective deliberation it exists to provide through at least 2027. Exercise response times, which slowed from three to four days in 2024 to 12–19 days in 2025, will likely be the clearest public measure of whether that cost is easing; a return toward the earlier pace would indicate the new appointees are restoring coordination, while continued lag would confirm the readiness gap is structural. The PLA will likely sustain visible tactical operations, such as the Scarborough Shoal drone mission, to project continuity even as its collective command capacity remains diminished heading into 2028. For Taiwan and the region, this likely means a PLA that is less capable of a coordinated, large-scale joint campaign in the near term but no less willing to apply pressure through smaller unilateral operations, making gray-zone incidents in the South China Sea and around Taiwan the more likely form of PLA activity through 2028. The principal risk to this assessment is that the purge restores command discipline faster than the vacancy rate implies, in which case the 2027 target could prove more attainable than current indicators suggest.

[Edwin Ferrell]

About GSIS

Embry-Riddle Aeronautical University's (ERAU) Bachelor of Science in Global Security & Intelligence Studies (GSIS) degree program at our Prescott Campus blends both academic and professional studies to equip students with the knowledge and skills necessary to become future leaders in intelligence, security, and law enforcement. The program provides students with a sound foundation in the liberal arts, including international relations, foreign languages and cultures, international law, foreign policy, political and military history, and other essential topics.

About EE

Eagle Eye Intelligence (EE) is an intelligence and research organization led by the students of the GSIS program at ERAU in Prescott, Arizona.

Dr. Philip E. Jones founded EE and Embry-Riddle's GSIS program in 2002, following a career with the Central Intelligence Agency and consulting work in international development and global security. Currently, Professor Dale R. Avery, a former career intelligence analyst, serves as EE's faculty advisor.

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Christina Muchow, a Senior in the GSIS program, currently serves as EE's Editor in Chief. For questions or comments, contact the team at pregleye@erau.edu or Professor Avery at 928.777.4708. If you use material from this publication, you should attribute: Eagle Eye Intelligence Edition 504, a publication created by students at Embry-Riddle Aeronautical University in Prescott, Arizona.



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