Week commencing 16 November 2026

ClearPath Partnership

COVERAGE
2 – 15 November 2026

AUDIENCE
Executive leadership · Technology, defence and security decision-makers

HANDLING
Internal use — not for onward distribution

IF YOU JUST REMEMBER ONE THING FROM THIS BRIEFING…

Beijing has confirmed what the last edition could only flag as unconfirmed: the rare-earth suspension runs to 10 January 2027, not until it lapsed.

MOFCOM extended the suspension by formal notice on 9 November, before the old 10 November deadline arrived. Licensing on seven other rare earths is untouched throughout. Ask your supply-chain team: has planning moved to the new January date, or is it still working off the one that no longer applies?

FORTNIGHT IN REVIEW

Geopolitics, defence and security

PRIORITY

9 NOV

China confirms rare-earth suspension extended to 10 January

MOFCOM and customs issued Announcement No. 58 on 9 November, extending the suspension of October 2025's extraterritorial "0.1%" rule and curbs on five rare earths from 11 November to 10 January 2027. April 2025 licensing on seven other rare earths, including dysprosium and yttrium, stays unaffected.

So what: confirmed relief removes an immediate shock, but it now expires alongside the US-China trade truce — plan around 10 January, not a vague extension.

PRIORITY

10–11 NOV

Abu Dhabi talks end without breakthrough; POW swap agreed

The first US-brokered trilateral Russia-Ukraine-US talks since February took place in Abu Dhabi, Kyiv led by Rustem Umerov. A prisoner exchange was agreed, but a US negotiator reported only "a little flexibility." Russia pushed to exclude Europe; Putin has not dropped his demand that Ukraine cede all of Donbas.

So what: this is process, not progress. Russia's territorial demands and bid to sideline Europe are unchanged — plan for the war to continue through winter.

PRIORITY

10–11 NOV

NATO jets twice fail to down drone over Lithuania amid Baltic incursion

Lithuania's crisis centre called it the most unsettled night in the country's history: four drones and dozens of suspected surveillance balloons crossed from Belarus toward NATO's border, one briefly entering Polish airspace before reversing, while fighters twice failed to intercept a drone over northern Lithuania.

So what: NATO's record against slow, cheap targets remains poor. Expect continued eastern-flank testing and pressure for counter-drone investment, not a one-off.

WATCH

1–10 NOV

Taiwan reports sustained Chinese gray-zone pressure before APEC and elections

Taiwan's defence ministry logged area-denial drills by the Liaoning carrier group, 49 Chinese aircraft sorties in one 24-hour period, and Coast Guard harassment of shipping off its east coast, ahead of the Shenzhen APEC summit and Taiwan's local elections later this month.

So what: treat this as signalling tied to the political calendar, not a blockade prelude — but it raises the cost of any Taiwan Strait disruption contingency.

WATCH LIST

Developments to track this fortnight

DEVELOPMENT	REGION	SECTOR AFFECTED	WHAT TO WATCH NEXT
Rare-earth suspension extended to 10 Jan 2027	China / global	Technology, defence, supply chain	Whether Beijing moves early, and the outcome of Shenzhen APEC talks.
Abu Dhabi talks and territorial impasse	Russia / Ukraine	Defence, security	Whether a further round is scheduled and whether Europe is included.
Baltic drone and balloon incursions	Lithuania / Poland / NATO	Defence, security	Further incursions and any change to NATO's rules of engagement.
Taiwan gray-zone pressure	Taiwan / China	Technology, defence, supply chain	Scale of any PLA drill and Taiwan's 28 November local elections.
Russia's winter energy-grid campaign	Russia / Ukraine	Defence, supply chain	Whether strikes continue nationwide despite the Abu Dhabi talks.

This is a watch list, not a task list — track these for consequence, not remediation, and confirm before acting.

REGULATORY AND SECTOR WATCH

What changed, and what is coming

In force now

- China's April 2025 licensing on seven rare earths, including dysprosium and yttrium, continues regardless of Announcement No. 58.
- NATO's enhanced eastern-flank air policing stays in place after repeated Baltic and Polish airspace violations.

Approaching

- China's rare-earth suspension on holmium, erbium, thulium, europium and ytterbium now runs to 10 January 2027.
- Taiwan's local elections on 28 November, watched for any shift in cross-strait posture.

Standing watch — GNSS interference. Jamming and spoofing across the Baltic, Black Sea and Mediterranean routes continues at record levels. No change to guidance: confirm holdover for any GNSS-timing dependency.

RECOMMENDED

Three things to do before the next edition

- Re-set supply-chain contingency planning around the new 10 January 2027 date, not the lapsed 10 November one.
- Review counter-drone and air-defence exposure for Baltic or Polish operations given NATO's failed interceptions.
- Treat Abu Dhabi talks as preliminary — do not revise Russia-exposure risk ratings on the POW swap alone.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely China lets the rare-earth suspension run to January rather than reopening it early, and likely further Baltic drone or balloon incursions occur. It is a realistic possibility a further Russia-Ukraine round is scheduled, and unlikely it produces a territorial breakthrough.

NEXT EDITION

Monday 30 November 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

ClearPath Partnership