MURANIKA

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THE WEEK IN FOCUS

From the APEC and ASEAN–India summits to a new EU–Indonesia trade pact, this was a week of diplomacy, trade realignment and technological acceleration. AI investment continued to reshape the technology economy, while climate negotiators made incremental progress against a backdrop of unresolved political differences.

INSIDE: APEC • ASEAN–INDIA • TRADE • AI & CHIPS • SCIENCE • CLIMATE • AVIATION

THE GLOBAL DESK

Diplomacy, trade and the changing economic order

1 | APEC leaders put regional integration and innovation back on the agenda

Leaders from the 21 APEC economies met in Shenzhen on 18–19 November and issued the 2026 Leaders' Declaration. Its priorities include trade and investment, connectivity, innovation and economic growth, with renewed emphasis on an open, connected Asia-Pacific and work toward the Free Trade Area of the Asia-Pacific agenda.

Why it matters: APEC's direction influences trade rules, supply-chain cooperation and the policy environment for businesses across a region that accounts for a major share of global commerce.

Source: https://www.apec.org/meeting-papers/leaders-declarations/2026/2026-apec-leaders-declaration

2 | ASEAN and India deepen cooperation at Manila summit

The 23rd ASEAN–India Summit took place in Manila on 17 November. Leaders reviewed the Comprehensive Strategic Partnership and adopted a joint statement on disaster-management cooperation, reinforcing regional resilience and practical coordination as the partnership approaches its 35th anniversary in 2027.

Why it matters: Stronger ASEAN–India coordination can support regional connectivity, disaster response, trade and a more stable Indo-Pacific.

Source: https://asean.org/chairs-statement-of-the-23rd-asean-india-summit/

3 | WTO warns trade restrictions are accumulating at a record pace

The World Trade Organization reported on 17 November that members introduced 1,048 new trade-related measures in the first half of 2026. Of these, 333 were restrictive or otherwise non-facilitating. Measures still in force covered 21.3% of world imports by value as of 30 June 2026, the highest share recorded since WTO monitoring began in 2009.

Why it matters: More trade barriers raise uncertainty for exporters, manufacturers and consumers, while the parallel rise in trade-facilitating measures shows that cooperation remains possible.

Source: https://www.wto.org/english/news_e/news26_e/tmwto_17nov26_552_e.htm

4 | NVIDIA reports triple-digit annual growth as AI infrastructure demand surges

NVIDIA reported fiscal third-quarter revenue of $115.8 billion on 17 November, up 103% year on year. Data-centre revenue reached $107.6 billion, also more than doubling from a year earlier. The results underline the scale of spending on AI computing infrastructure.

Why it matters: Chip supply, data-centre capacity, energy availability and capital spending across the technology sector remain closely tied to the pace of AI adoption.

Source: https://investor.nvidia.com/news/press-release-details/2026/NVIDIA-Announces-Financial-Results-for-Third-Quarter-Fiscal-2027/

5 | OpenAI expands free frontier-model access to 200,000 researchers

OpenAI announced on 16 November that it would expand its ChatGPT for Academic Researchers programme to offer up to 200,000 researchers worldwide free access. The next application round was scheduled to open on 23 November, with 50,000 new grants available to eligible researchers and collaborators.

Why it matters: Wider access could help research teams test ideas and accelerate work in science, mathematics and engineering, while making data-use safeguards and independent evaluation increasingly important.

Source: https://openai.com/index/expanding-chatgpt-for-academic-researchers/

6 | Japan and India reinforce security and Indo-Pacific coordination

Foreign and defence ministers from Japan and India held their fourth 2+2 dialogue in Tokyo on 19 November. They discussed a free and open Indo-Pacific, maritime security, defence cooperation, joint exercises and closer coordination on regional and global issues.

Why it matters: The dialogue signals that the two major Asian economies intend to deepen strategic coordination alongside their economic and technology relationship.

Source: https://www.mofa.go.jp/press/release/pressite_000001_02862.html

CLIMATE, COMMERCE & CONNECTIVITY

Agreements, implementation and the next phase

7 | EU and Indonesia sign trade and investment agreements

The European Union and Indonesia signed their Comprehensive Economic Partnership Agreement and Investment Protection Agreement on 21 November. The European Commission says the agreements are designed to diversify trade relationships, improve market access and strengthen supply chains for energy and raw materials.

Why it matters: The deal connects the EU more closely with Southeast Asia's largest economy, although its full commercial effects depend on ratification and implementation.

Source: https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/indonesia_en

8 | COP31 advances climate implementation but misses a political cover decision

COP31 concluded in Antalya on 22 November. Negotiators reached agreements on issues including just transition, climate finance and adaptation, while the conference also reported progress on electrification and other implementation initiatives. However, countries failed to agree on the presidency-led cover decision.

Why it matters: The outcome shows movement on practical climate action but continuing divisions over the political framework, finance and the pace of transition.

Source: https://unfccc.int/news/cop31-delivers-important-progress-across-negotiations-and-action-agenda-advancing-implementation-but

9 | ICAO conference turns attention to aviation's long-term transition

The International Civil Aviation Organization held its seventh Worldwide Air Transport Conference in Montréal from 16–20 November. The agenda addressed how the aviation sector can navigate structural change and prepare for the industry's longer-term development toward 2050.

Why it matters: Decisions and recommendations from global aviation forums can shape connectivity, safety, sustainability and the investment priorities of airlines and airports.

Source: https://www.icao.int/sites/default/files/Meetings/2026/ATconf7/DB/ATCONF.7.2026.DB.1.EN.pdf

WHAT TO WATCH NEXT WEEK

Watch how the APEC and ASEAN–India commitments move into implementation; the next steps for the EU–Indonesia agreements; progress on AI infrastructure and research access; and whether climate negotiators can rebuild consensus after COP31. The practical test for each announcement will be delivery, funding and measurable outcomes.

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