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WEEKLY SECURITY BRIEFING

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Weekly Security Briefing

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Executive Summary — This Week's Key Global Developments

- **Hormuz escalation:** Commercial shipping and state-controlled energy transport became direct instruments of the Iran–United States confrontation. Two tankers were struck during outbound transits on 31 August: UK Maritime Trade Operations (UKMTO) linked Warning 124-26 to *Senegal Prosperity*, whose crew suffered no casualties. Saudi shipping company Bahri identified *Sidr* as the vessel involved in the separate Warning 126-26 incident and said two Filipino seafarers were killed aboard. The escalation widened on 5 September when US Central Command said it disabled or destroyed three Iranian crude carriers after Iranian ballistic-missile launches against a US carrier and destroyer. The immediate security issue is no longer an isolated maritime incident but a retaliatory cycle in which merchant hulls, energy flows and naval forces occupy the same battlespace.
- **Ukraine diplomacy without a settlement:** US envoys Steve Witkoff and Jared Kushner left Kyiv on 7 September without a breakthrough after talks with President Vladimir Putin in Moscow and President Volodymyr Zelenskyy in Kyiv. A reciprocal three-day pause in long-range strikes against the two capitals protected the diplomatic travel window but did not cover the rest of Ukraine. The narrow scope of the pause and the absence of a public compromise suggest that both parties still see temporary restraint as a tactical device rather than the start of a general ceasefire. For businesses, the distinction matters: diplomatic contact reduced exposure around two capitals for several days but did not materially change countrywide infrastructure, aviation or supply-chain risk.
- **Actively exploited enterprise software:** CISA added two PaperCut vulnerabilities, CVE-2026-81578 and CVE-2026-82078, to its Known Exploited Vulnerabilities catalogue on 31 August. PaperCut confirmed customer incidents and issued emergency patches, while Sansec reported that a separate unauthenticated remote-code-execution flaw, StyleSmuggler, was being used against Magento and Adobe Commerce installations from 4 September. Researchers also observed attempts to exploit Citrix NetScaler CVE-2026-19490, although successful compromise was not confirmed. The common mechanism is rapid exploitation of internet-facing administrative and commerce systems before routine patch cycles can catch up, creating simultaneous exposure for printing infrastructure, remote access and online sales.
- **Mass-casualty flooding in Nepal:** Official figures for the 26 August Rasuwa/Bhotekoshi flood continued to rise during the reporting week. Nepal's National Disaster Risk Reduction and Management Authority (NDRRMA) reported 1,259 dead, 5,083 out of contact and 12,038 rescued as of 3 September; by 6 September it reported 1,342 recovered bodies and 4,996 people still unaccounted for. The changing totals reflect an active recovery and tracing operation rather than a settled casualty picture. The scale of loss, combined with damaged access and communications in mountain terrain, will continue to affect relief logistics and movement well beyond the initial flood corridor.

- **Indonesian aviation disruption:** Anak Krakatau produced a roughly 25-hour eruptive episode from 4 to 6 September, spreading ash across parts of Java, Sumatra and adjacent airspace. Indonesia's transport ministry said eight airports were temporarily closed, 1,558 flights were delayed and about 170,000 passengers were affected. Authorities maintained Alert Level III and a three-kilometre exclusion zone but issued no tsunami warning. The event demonstrated how a geographically confined volcanic hazard can interrupt national and international aviation through Jakarta while also affecting Sunda Strait traffic and local ground transport.
- **Sudan displacement shifted southeast:** Fighting in Blue Nile state drove another large population movement from Geissan and Al-Kurmuk. The United Nations reported on 1 September that local authorities estimated nearly 22,000 people had been displaced from Geissan over the preceding seven days; the International Organization for Migration (IOM) later recorded another 1,690 people leaving three villages for Baw on 5 September. The figures describe successive population movements rather than a single completed evacuation. The operational pressure falls on receiving towns, schools, aid access routes and protection services already constrained by Sudan's wider war.
- **Organised crime adapted after a senior arrest:** Peruvian and Bolivian authorities captured Jhonsson Smit Cruz Torres, known as "Jhonsson Pulpo," in La Paz on 1 September. Peru identifies him as the leader of the Trujillo-based Los Pulpos organisation, which is associated with extortion, kidnapping and violence. The arrest removes an experienced coordinator, but nearly 27,000 extortion complaints recorded in Peru in 2025 indicate a criminal market far larger than one group. Competitors can occupy abandoned territory, recruit existing collectors and preserve the revenue system even if the captured leader's own network fragments.

Europe

HIGH

Shuttle diplomacy contained risk briefly but did not change the war

Capital-level restraint was temporary. US envoys Steve Witkoff and Jared Kushner met President Putin in Moscow on 5 September and travelled by train to Kyiv for talks with President Zelenskyy on 6 September. Reuters reported that the meetings produced discussion of "new ideas" and the prospect of further talks, but no breakthrough was announced before the envoys departed early on 7 September. Kyiv used the visit to raise winter energy protection, air defence and Patriot systems; Moscow did not publicly retreat from its stated territorial and security demands.

The diplomatic travel was supported by a narrowly defined pause in long-range attacks. Kremlin spokesman Dmitry Peskov said Putin had ordered a three-day halt to strikes on Kyiv from midnight on 5 September. Ukrainian officials said they would reciprocate for Moscow through the end of 7 September. The arrangement applied to the capitals, not to all of Ukraine, and therefore did not create a general cessation of hostilities or remove risk from regional transport, industrial and energy sites.

The mechanism was deconfliction, not de-escalation. Both parties had an immediate interest in allowing the US delegation to move and meet senior leaders without a strike on either capital derailing the process. That shared interest was short-lived and did not resolve the central dispute over occupied territory, Ukrainian alignment or the terms of any durable security arrangement. A pause designed around named cities and diplomatic timing can lower immediate exposure while leaving the underlying strike capability, target sets and political intent unchanged.

Infrastructure pressure remained part of the conflict. According to The Record, citing Russian business newspaper *Kommersant*, a late-August presidential decree allowing temporary state control of inadequately protected critical infrastructure is also being applied to data centres that host government, banking and major service systems. Russian operators are hardening external equipment and face higher capital costs as Ukrainian drone activity pushes physical defence into what was previously treated mainly as an information-security sector. Concentration of large facilities around Moscow and St Petersburg leaves a substantial share of Russian digital capacity dependent on local air-defence performance, power continuity and physical perimeter protection.

The decree also shows how sustained drone pressure changes state–business relations. If authorities can take temporary control when an operator is judged unable to protect a site, the consequences extend beyond repair costs. Ownership may remain private while security decisions, access controls and service continuity become subject to emergency state intervention. The practical exposure for customers is service disruption or reduced transparency at the point where physical attack risk and state security authority meet.

Intelligence Assessment

High The September shuttle diplomacy is unlikely to alter the European operating picture unless a follow-on agreement extends restraint beyond Kyiv and Moscow, covers a longer period and includes a mechanism for addressing violations. The current arrangement demonstrated that limited deconfliction is possible when all parties need a protected diplomatic window. It did not demonstrate acceptance of a broader ceasefire. Continued Russian and Ukrainian investment in long-range strike protection, including hardened data infrastructure, indicates that both sides still plan for a sustained campaign rather than a near-term end to hostilities.

ALSO MONITORED THIS WEEK

- **Kyiv airport exposure:** Ukrainian officials said Russian strikes hit the Zhuliany and Boryspil airport areas before the US envoys arrived, and the delegation entered Kyiv by train. The reported attacks did not prevent the visit, but they reinforced the limits of using capital-level diplomacy as evidence of restored aviation access or normalised executive movement.
- **Data-centre protection:** Russian data-centre operators are being drawn into national infrastructure defence as drone range and frequency expose equipment outside hardened buildings. The relevant business issue is the dependence of banking, government and major services on clustered facilities whose continuity now requires physical protection against aerial attack as well as ordinary redundancy.
- **Political fragmentation:** The Alternative for Germany became the strongest party in the 6 September Saxony-Anhalt state election but did not secure a majority. The result may complicate coalition formation and intensify domestic arguments over defence, migration and support for Ukraine, although it does not by itself change federal policy.

Middle East

CRITICAL

Tanker strikes moved commercial shipping deeper into the conflict

Two separate attacks occurred on 31 August. UKMTO Warning 124-26 recorded an outbound tanker struck by three unknown projectiles about 17 nautical miles east of Khasab, Oman, at approximately 2000 UTC on 31 August. The warning reported no casualties or environmental impact. UKMTO's 4 September Voluntary Reporting Area overview identified the vessel as *Senegal Prosperity*, IMO 9532757. Seatrade, citing maritime reporting, said the crew was evacuated after the ship listed; no casualties among the crew were reported.

The Saudi tanker *Sidr*, IMO 9854715, was involved in a separate incident recorded as Warning 126-26. Bahri identified the vessel and said on 2 September that two Filipino seafarers had been killed aboard. Reuters independently reported the operator's statement. Saudi Arabia attributed the attack to Iran; Tehran did not accept that attribution. Iran's Islamic Revolutionary Guard Corps (IRGC) said vessels had struck mines while using an unauthorised route, whereas UKMTO reporting described projectile strikes. The competing accounts leave the weapon and direct responsibility contested, but the casualties and identity of *Sidr* are confirmed by its operator.

Keeping the two warnings separate is essential. The no-casualty statement in Warning 124-26 concerns *Senegal Prosperity* and does not contradict Bahri's account of two deaths aboard *Sidr* under Warning 126-26. Treating them as one event

would erase a material difference in human impact and distort the incident record used by vessel operators, insurers and security managers.

Threat reporting remained severe. UKMTO's 4 September overview retained JMIC's SEVERE assessment for the Strait of Hormuz and SUBSTANTIAL assessments for the Gulf of Oman, Gulf of Aden and Bab el Mandeb. It recorded 24 projectile-strike incidents since 6 July, 21 of them on the southern route. Reported Automatic Identification System (AIS) transits remained about 90 percent below the pre-conflict baseline, while tankers represented 46 percent of current traffic. These figures indicate both a sharp reduction in normal movement and continued concentration of residual traffic among vessels carrying strategically important cargo.

Low transit volume does not remove exposure. It can make each movement more visible, reduce the number of nearby vessels able to assist and concentrate commercial decisions around a small number of routes and time windows. The southern route's incident history is particularly important because route displacement only redistributes exposure if armed actors can reach both customary and alternative transit lanes.

US strikes created a direct tanker-for-tanker exchange

US forces attacked three Iranian crude carriers. US Central Command said on 5 September that the IRGC had launched ballistic missiles towards a US aircraft carrier and a guided-missile destroyer. The ships evaded the missiles, and no American personnel were harmed. CENTCOM then said it permanently disabled *M/T Downy* at Kharg and *M/T Stark 1* at Jask. It also ordered the crew of the unladen *M/T Kyo*, also reported as *Noxen*, to abandon ship before destroying it in the Gulf of Oman; CENTCOM later said the vessel had sunk, as reported by Bloomberg on 5 September.

The response imposed an economic cost through state-linked shipping rather than limiting retaliation to launch infrastructure or naval units. That choice makes crude carriers both strategic assets and coercive targets. It also narrows the distinction between commercial maritime operations and military signalling, especially where ownership, cargo, flag, destination or state control connect a vessel to a conflict party.

The sequence creates a risk of reciprocal target expansion. Iran can answer pressure on its export fleet by attacking vessels connected to US partners or by further restricting passage. The United States can respond against additional energy assets if its ships are attacked again. Neither side needs to close the Strait formally to generate severe disruption: repeated attacks, ambiguous attribution and rising insurance constraints can suppress traffic through commercial caution alone.

Energy and crew risk now move together. The death of two seafarers aboard *Sidr* shows that economic coercion through shipping has immediate human consequences. Ship managers must account for crew exposure, salvage, pollution potential and delayed port calls at the same time that governments use tankers to impose strategic cost. Even an unladen ship can become a target because its value lies in future carrying capacity and the political meaning of its ownership.

Intelligence Assessment

High The Strait of Hormuz is in an active retaliatory cycle in which merchant shipping can be selected for political ownership, national association or energy value rather than immediate military behaviour. Further incidents are likely while Iran and the United States retain both the capability and the declared willingness to impose costs through maritime assets. A material reduction in danger would require a sustained halt to attacks on commercial vessels and naval forces, followed by a measurable recovery in normal transit volume. Advisory language alone will not establish that change.

ALSO MONITORED THIS WEEK

- **Yemen displacement:** Fighting along frontlines in Ta'iz on 3 September displaced about 1,790 households, according to a ReliefWeb flash update. This was a land-conflict event and should not be treated as confirmation of maritime activity, but it shows that Yemen's internal war continues to generate civilian movement while Red Sea and Hormuz risks draw international attention.
- **Advisory cadence:** JMIC issued advisory updates on 1, 3 and 6 September. The frequency of reporting reflects a maritime picture that can change inside a voyage-planning cycle. UKMTO associated Warning 126-26 with a second outbound tanker, while Bahri identified that vessel as *Sidr*; the detailed content of the 6 September update was not independently available at publication time.
- **Cost imposition:** US Central Command, as reported by Reuters and CNN, framed the 5 September tanker strikes as a higher economic cost on Iranian shipping after missiles were launched at a US carrier and destroyer.

Africa

ELEVATED

Blue Nile fighting drove repeated displacement

Population movement accelerated around Geissan and Al-Kurmuk. The United Nations reported on 1 September that local authorities in Blue Nile estimated nearly 22,000 people had been displaced from Geissan locality during the previous seven days. IOM later reported that another 1,690 people left Abigo, Balang and Gambarda for Baw on 5 September. The reports describe successive movements across several communities rather than a one-off evacuation.

The displacement mechanism is cumulative. Families move from contested rural areas into schools, urban neighbourhoods or other temporary sites, placing pressure on accommodation, water, food and medical services. Receiving locations can then become exposed to renewed fighting or lose access when roads are cut. Repeated movement also separates households, complicates registration and produces different official counts as agencies update tracing and site access.

Access constraints amplify protection risk. Blue Nile is not an isolated humanitarian pocket. Conflict routes connect it to wider military competition involving the Sudanese Armed Forces, the Rapid Support Forces and aligned armed actors. When fighting affects border-adjacent localities and roads, aid organisations face longer delivery routes and less reliable access to displaced populations. Local schools and municipal facilities absorb immediate shelter demand even when they lack the staff or supplies to support a prolonged stay.

The week's developments in North Kordofan and West Darfur point to the same pressure on civilian systems. The United Nations said attacks around El Obeid caused casualties, displacement and looting, while a drone strike hit a fuel market in West Darfur near the Chad border. Humanitarian Coordinator Denise Brown also warned that non-state armed groups were detaining a growing number of aid workers. Detention reduces field access twice: it removes personnel directly and forces agencies to restrict movement in areas where communities already depend on external support.

Insurgent reach remained a concern in Mozambique

A camp attack extended insecurity into Niassa. Reuters reported on 4 September that suspected insurgents attacked and burned a hunting camp near Marangira, prompting the evacuation of at least three Americans. Later local and specialist reporting alleged deaths, abductions, vehicle theft and the destruction of a health facility and police post. Those casualty claims were not confirmed in the Reuters dispatch and remain less certain than the attack, fire and evacuation.

The location matters because Niassa sits outside the better-known centre of Islamic State-linked violence in Cabo Delgado. An attack on a remote camp can produce outsized effects even without a sustained occupation. Roads are limited, medical support is distant and international staff may depend on air evacuation or a small number of vehicles. Burning accommodation and taking vehicles also deny future access while giving armed groups mobility and supplies.

Intelligence Assessment

Medium Africa's principal shift this week was the spread of pressure across peripheral locations where state and humanitarian reach is thin. Blue Nile displacement is well established, while the full casualty picture in Niassa is not. Both cases show how attacks on roads, camps, markets and local facilities can interrupt access without armed groups holding major cities. The near-term trajectory is likely to remain uneven: local security gains may coexist with new displacement or isolated attacks in areas that have little capacity to absorb either.

ALSO MONITORED THIS WEEK

- **Aid-worker detention:** The UN humanitarian coordinator reported an increasing number of aid personnel held by non-state armed groups in Sudan and called for their release. Continued detention would further reduce access to communities outside government-held centres and make reported casualty and displacement figures slower to verify.
- **Kordofan pressure:** Attacks around El Obeid and insecurity elsewhere in North Kordofan displaced about 450 people, according to IOM reporting cited by the United Nations. The number is smaller than the Blue Nile movement, but the incidents matter because El Obeid is an important transport and supply node in Sudan's conflict geography.
- **Niassa uncertainty:** Reports of fatalities and abductions after the Marangira camp attack remained inconsistent at the reporting cut-off. Confirmation by authorities, the operator or a major independent news organisation would indicate whether the incident was primarily a destructive raid or involved a more deliberate hostage and casualty component.

Asia

ELEVATED

Nepal's flood toll rose as recovery teams reconciled missing-person records

The casualty picture remained provisional. NDRRMA reported 1,259 deaths, 5,083 people out of contact and 12,038 rescued as of 1900 on 3 September following the Rasuwa/Bhotekoshi flood. By 6 September, the authority reported 1,342 recovered bodies, 4,996 still unaccounted for and more than 13,000 rescued. Nepal Police published a lower missing-person figure on 7 September, reflecting differences in tracing and record reconciliation. The numbers should therefore be read as dated operational snapshots, not a final toll.

The disaster originated in difficult mountain terrain and affected communities, roads and communications along a transboundary river system. Search teams face unstable ground, debris, damaged access and incomplete records for local residents, foreign nationals and people in transit. Those conditions explain why recovered-body totals can rise while the number recorded as missing falls unevenly. They also delay reliable identification, leaving family notification and consular casework behind the physical recovery effort.

The disruption will outlast rescue operations. A high rescue count does not mean access has normalised. Damaged roads and telecommunications affect relief distribution, commercial movement and the ability to account for workers or travellers. Temporary shelter, treatment capacity and onward transport remain part of the same security picture because a population concentrated away from home becomes more dependent on local authorities and external logistics.

Anak Krakatau disrupted aviation across a much wider area than the exclusion zone

Ash closed major airports. Indonesia's geology agency recorded continuous eruptive activity from 2307 local time on 4 September until 0004 on 6 September, a period of roughly 25 hours. Ash spread over Banten, West Java, Jakarta, Lampung and Bengkulu. The transport ministry said eight airports were temporarily closed, 1,558 flights were delayed and about 170,000 passengers were affected. Airport status continued to change through 7 September, including restrictions affecting Jakarta's main aviation system.

Authorities kept Anak Krakatau at Alert Level III with a three-kilometre exclusion zone. They reported no tsunami warning. The distinction is operationally important: the direct volcanic exclusion area remained small, while airborne ash disrupted passenger and cargo movements across a national transport network. Airport closure decisions depended on plume movement and ash concentration rather than distance from the cone alone.

The Sunda Strait also remained relevant to shipping and local ferries. A three-kilometre maritime exclusion zone limits the closest approaches, but the main commercial effect came through visibility, ash, local port conditions and disrupted connections between air and ground transport. The event illustrates a recurring regional hazard: a volcano need not produce a tsunami or major lava impact to interrupt international schedules and time-sensitive supply chains.

Taiwan sought to accelerate unmanned systems and missile-defence capability

The cabinet proposed additional defence spending. Taiwan's government approved a proposal on 3 September for another NT\$145.7 billion, about US\$4.6 billion, in 2026 defence expenditure. The package covers drones, the Strong Bow or Chiang Kung mid-tier anti-tactical-ballistic-missile system, munitions and two classified programmes. Reuters reported planned quantities including more than 600 coastal intelligence, surveillance and reconnaissance drones, more than 40,000 coastal attack drones and the first tranche of over 100 small uncrewed surface vessels. Legislative approval is still required.

The proposal indicates a preference for dispersed systems that can survive, observe and impose cost close to Taiwan's coast. Large quantities of comparatively small platforms can complicate an adversary's targeting problem, but procurement numbers do not equal fielded capability. Production, operator training, communications, maintenance and integration with existing command systems will determine how quickly the spending changes readiness.

Intelligence Assessment

High Asia's elevated rating reflects severe natural-hazard disruption alongside persistent military preparation, not a single regional crisis. Nepal and Indonesia showed how terrain and ash can interrupt access far beyond the immediate hazard zone. Taiwan's spending proposal is likely to strengthen a longer-term shift towards distributed coastal defence if the legislature approves and industry can deliver at scale. None of these developments alone signals imminent interstate conflict, but each can compress decision time for transport operators, employers and governments.

ALSO MONITORED THIS WEEK

- **National mourning:** Nepal observed a day of national mourning on 7 September as recovery operations continued. The decision reflected the scale of loss but did not mark the end of search, identification or assistance activity.
- **Taiwan Strait activity:** Taiwan's defence ministry reported 13 People's Liberation Army Navy vessels, four Chinese government ships and two military aircraft around the island during 6–7 September, including two median-line or air-defence-identification-zone crossings. The activity was limited compared with a major exercise but provides a baseline against which any post-budget increase in military pressure can be measured.
- **Sunda Strait controls:** Indonesian authorities maintained the three-kilometre exclusion zone around Anak Krakatau and continued to track ash dispersion. A wider or longer airport closure pattern, changes to ferry operations or a higher alert level would mark a shift from disruptive eruption to a broader transport crisis.

Latin America / Caribbean

ELEVATED

Peru's high-value arrest did not dismantle the extortion market

Bolivian police captured an alleged Los Pulpos leader. Peru's Interior Ministry confirmed on 1 September that Jhonsson Smit Cruz Torres, known as "Jhonsson Pulpo," had been arrested in La Paz after a Peruvian-led search and was being returned to Peru. The ministry describes him as the head of the Trujillo-based Los Pulpos criminal organisation, which it says has more than 100 members. He had previously received a life sentence in absentia and was among Peru's most wanted fugitives.

The arrest followed a prominent kidnapping case in Trujillo. InSight Crime reported that police accused Los Pulpos of abducting mining businessman Jenss Lara Tantaquilla and killing four of his companions; Lara was released the following day. Reporting linked the case to extortion demands, although the victim's father publicly denied that ransom had been paid. That disagreement should not obscure the confirmed pattern: kidnapping, lethal violence and protection demands are being used to enforce criminal revenue in and around a major northern commercial centre.

Leadership removal will probably redistribute violence. Peru recorded nearly 27,000 extortion complaints in 2025, a volume that cannot be attributed to one organisation. Transport operators, small businesses and mining-linked activity provide repeatable targets because payments can be demanded across many districts and enforced through low-cost violence. Removing a senior leader can disrupt communications and finance, but collectors, gunmen and local rivals do not disappear with the arrest.

Los Pulpos also illustrates the regional reach of nominally local groups. Cruz Torres was arrested in Bolivia, while the organisation has reported links in Chile and Ecuador. Cross-border movement gives leaders additional hiding places and supports finance, document fraud or movement of associates. It also separates the location of command from the communities experiencing threats, making local arrests less likely to dismantle the complete network.

Security policy hardened elsewhere in the region

Colombia closed three peace tables. Colombian reporting in late August said President Abelardo de la Espriella's government had formally ended negotiations with EMBF, CNEB including the Border Command, and ACSN, also known as Los Pachenca. Other channels created under the previous administration had not been administratively closed by the reporting cut-off. The government also revoked the 2015 resolution that suspended aerial glyphosate spraying. Colombian reporting stressed that revocation does not automatically restart spraying because environmental, consultation and health conditions imposed by the courts still apply.

The change removes a political channel while reopening a contested legal option for coca eradication. Its immediate effect is signalling rather than an instant reduction in armed-group capacity or coca supply. Groups can respond to closed negotiations through fragmentation, tactical cooperation or violence against state forces and communities. Likewise, a legal path to aerial spraying matters only if regulatory conditions are met and the state can operate aircraft securely in affected areas.

Haiti's information environment became more hostile. Photographers working for AP, AFP and EFE were assaulted by mourners on 2 September while covering funerals in Kenscoff for victims of the 23–24 August gang massacre. The United Nations had put the massacre toll at at least 47 dead. The assaults occurred at a civilian burial site rather than during a confrontation with a gang, showing how anger, grief and distrust can endanger media personnel even outside an active firefight. Reduced reporting access can in turn make casualty verification and warning of new violence less reliable.

Intelligence Assessment

Medium Latin America's main pattern this week was harder enforcement without evidence of structural criminal contraction. Peru achieved a high-value arrest, Colombia closed negotiation channels and the United States imposed a temporary movement restriction on its officials in Nogales. These measures may disrupt individual networks or reduce short-term exposure, but extortion, territorial competition and gang coercion remain embedded in local markets and cross-border routes. Leadership losses are therefore more likely to produce adaptation or succession than rapid collapse.

ALSO MONITORED THIS WEEK

- **Nogales restriction:** The US Embassy in Mexico said on 5 September that unspecified threat information had led it to restrict US government activity in and travel to Nogales, Sonora, to essential daylight movement. Sonora remained at Level 3, "Reconsider Travel"; the alert was not a general travel ban for private citizens and did not identify the threat publicly.
- **Press exposure:** AP, AFP and EFE photographers were beaten while covering the Kenscoff funerals in Haiti. The incident adds civilian hostility and crowd volatility to the direct threat from gangs, narrowing the spaces in which independent reporting can take place safely.
- **Colombia reversal:** The formal end of three negotiation tables and removal of the decade-old glyphosate suspension signal a more coercive security policy. The next material test is whether armed groups intensify attacks and whether the government satisfies the legal conditions required before aerial spraying can resume.

Global Intelligence Assessment

Retaliation is moving through civilian systems. The week's most serious escalation occurred at sea, where tanker ownership and energy value became grounds for attack. The same mechanism appears in less direct form elsewhere: Ukrainian drone pressure changes how Russian data centres are protected; armed conflict in Sudan turns schools and local services into displacement infrastructure; volcanic ash closes airports far from the crater. The security effect is produced not only by the original strike or hazard but by the dependency it interrupts.

Short-term control should not be confused with structural improvement. The Kyiv–Moscow pause protected a diplomatic window but did not create a national ceasefire. The arrest of Jhonsson Pulpo removed a senior criminal figure but left Peru's extortion market intact. Airport reopening after volcanic ash will restore schedules faster than communities in Nepal can restore roads, communications and family records. In each case, a visible event may end while the mechanism that created exposure remains active.

Transport corridors are carrying more political weight. Hormuz, the Sunda Strait, Nepal's mountain roads, Ukrainian rail access and the Nogales border area all became focal points for state authority, hazard response or coercion. A route can remain physically open yet become commercially unreliable because of insurance, crew safety, ash, checkpoint rules or uncertain access. This gap between formal openness and usable access is likely to matter more than simple closure counts for organisations with staff, cargo or time-sensitive contracts.

Decision windows are shortening. Cyber exploitation began close to public disclosure and vendor patching. JMIC issued repeated maritime updates within one week. Indonesian airports changed status as ash moved, while Nepal's casualty and missing-person figures changed as records were reconciled. Organisations relying on weekly or monthly review cycles will receive a correct historical picture but may miss the moment when exposure changes. The relevant indicator is the speed and authority of new information, not the volume of commentary surrounding it.

Evidence quality remains uneven across active crises. Official or independently corroborated reporting supports the central findings on Hormuz, Ukraine diplomacy, Sudan displacement, Asian natural hazards and Peru's arrest. Some secondary events, especially casualty claims from remote parts of Mozambique and competing accounts of weapon type in the tanker attacks, remain contested. These gaps do not erase the incidents, but they reduce confidence in precise numbers and responsibility. Analysis should therefore separate confirmed operational effects from disputed attribution.

Watch Indicators

- **Hormuz attacks:** Additional UKMTO warnings involving projectile, missile, mine or boarding incidents within the Strait of Hormuz or Gulf of Oman, especially incidents tied to vessel ownership or national association.
- **Maritime traffic:** A sustained rise or further fall in reported AIS-enabled full transits compared with the 4 September UKMTO baseline, together with changes in tanker concentration, insurance terms or crew refusal rates.
- **US–Iran escalation:** New Iranian launches against US naval vessels, further US strikes on Iranian energy assets, or a shift from unladen and state-linked tankers to loaded commercial vessels and port infrastructure.
- **Ukraine diplomacy:** Extension of the capital-level strike pause beyond its original window, expansion to additional cities or infrastructure classes, announcement of trilateral talks, or verified violations that end the diplomatic channel.
- **Russian infrastructure controls:** Actual temporary state takeover of a private data centre under the late-August decree, or new physical-security requirements for clustered facilities around Moscow and St Petersburg.
- **Sudan access:** Further IOM displacement notices from Geissan, Al-Kurmuk or Baw; closure of access roads; attacks on receiving sites; or additional detention of humanitarian staff.
- **Mozambique spread:** Independently confirmed deaths or hostages from Marangira, repeat attacks in Niassa, or evidence that insurgents can hold routes and facilities beyond short-duration raids.
- **Nepal recovery:** Stabilisation or renewed divergence in official missing-person figures, restoration of road and telecommunications access, and changes in the number of communities reachable by relief services.
- **Anak Krakatau:** A higher alert level, expansion of the three-kilometre exclusion zone, renewed multi-airport closures, disruption to Sunda Strait ferry or commercial shipping, or any tsunami advisory.
- **Taiwan posture:** Legislative approval or reduction of the NT\$145.7 billion package, delivery schedules for drones and uncrewed surface vessels, and a sustained increase in Chinese air or maritime activity around the island.
- **Peru succession:** Extortion or retaliatory killings in Trujillo linked to Los Pulpos, visible fragmentation of the group, or movement by rival organisations into its collection areas.
- **Nogales security:** Renewal, expansion or lifting of the US government daylight-only restriction; public identification of the underlying threat; or a change to Sonora's travel-advisory level.
- **Colombia armed groups:** Violence following the closure of the three negotiation tables, legal and regulatory steps towards renewed aerial spraying, or a renewed channel between Bogotá and any of the affected groups.
- **Enterprise exploitation:** New CISA catalogue entries, confirmed compromise associated with Citrix CVE-2026-19490, an Adobe fix for StyleSmuggler, or evidence that PaperCut exploitation has moved into ransomware deployment.

Glossary of Abbreviations

Abbreviation	Meaning
AIS	Automatic Identification System
CENTCOM	US Central Command
CISA	Cybersecurity and Infrastructure Security Agency
CVE	Common Vulnerabilities and Exposures
IOM	International Organization for Migration
IRGC	Islamic Revolutionary Guard Corps
JMIC	Joint Maritime Information Center
NDRRMA	National Disaster Risk Reduction and Management Authority
UKMTO	United Kingdom Maritime Trade Operations

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Europe

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Middle East and maritime security

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Method Note

This report is based on open-source material reviewed up to 7 September 2026 and analytical assessment by S.F. Custos Global Reach Ltd. It does not replace legal, insurance, sanctions, medical or country-specific professional advice.