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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

- **Strait of Hormuz:** The International Maritime Organization's confirmed-incident list, updated on 24 September, recorded three merchant-ship casualties in the strait on 21 and 23 September, including one seafarer fatality. The bulk carrier *Cape Dao* (IMO 9219020) was damaged 15 nautical miles northeast of Khasab, Oman, on 23 September, with no pollution reported. On 21 September the tanker *LR Stephanie* (IMO 9282625) was damaged with two seafarers injured, and *Al Maryah* (IMO 9393682) was damaged with no pollution. Those rows sit on a cumulative register of 85 confirmed incidents and 24 seafarer fatalities as at 24 September. On 26 September President Trump told reporters he had rejected an Iranian proposal to reopen the strait and pause regional fighting within seven days. IMO's seafarer-evacuation framework remains paused. The waterway is neither confirmed closed nor restored to normal commercial conditions.
- **Ukraine air campaign:** Russian drone, missile and glide-bomb strikes ran through the week against Ukrainian cities, fuel sites, rail, industry and communications. Reuters reported on 23 September that Kyiv strikes hit railway infrastructure, warehouses and petrol stations; Mayor Vitali Klitschko said two people were killed and 45 injured that day. Interpipe said a missile strike on its Dnipro plant overnight 21–22 September killed four employees and wounded seven. Ukraine's Ministry of Digital Transformation put internet losses after the 23 September Kyiv attacks at around 100,000 households. The Guardian reported on 26 September that a further strike on Datagroup offices killed four people. President Zelenskyy said Russia had launched more than 2,200 attack drones, around 1,650 aerial bombs and 38 missiles in the preceding week — Ukrainian presidential figures, not an independent count.
- **NATO's eastern flank:** Poland's Armed Forces Operational Command said a Russian military Mi-8 helicopter entered Polish airspace north of Braniewo from Kaliningrad at 11:08 local time on 23 September, to a depth of about 300 metres, for 42 seconds. Overnight 23–24 September a fire broke out at a state-owned satellite station in Wola Krobowska that carries internet traffic, including Starlink-related connectivity. Deputy Prime Minister Krzysztof Gawkowski called it sabotage; Prime Minister Donald Tusk declined to apply that label with full certainty. On 25 September Polish prosecutors said there was reasonable suspicion the perpetrators acted on orders of Russian special services; no one had been charged, and the station remained operational. The same day, Denmark's Defence Intelligence Service warned of more frequent hybrid attacks and a "low but growing risk" of a limited military attack against one or several NATO countries bordering Russia.
- **Perimeter cyber risk:** CISA said on 27 September that two critical Citrix NetScaler flaws, CVE-2026-88771 and CVE-2026-88772, were being exploited globally and added both to its Known Exploited Vulnerabilities catalogue, with a 30 September due date for covered US federal civilian agencies and a requirement for forensic triage before patching. CERT-EU, Ireland's NCSC and Canada's CCCS issued same-day alerts. CVE-2026-88771 is unauthenticated remote code execution on customer-managed appliances. This is a perimeter-appliance emergency, not a confirmed mass outage of any named corporate network. Two days earlier, CISA had added exploited flaws in Microsoft SharePoint and MikroTik RouterOS to the same catalogue.

- **South China Sea:** The Armed Forces of the Philippines and the Philippine Coast Guard said Chinese navy and coast-guard vessels forced the suspension of a 24 September rotation-and-resupply run to the grounded BRP *Sierra Madre* at Second Thomas Shoal. Reuters reported there was no collision and no injury. Manila described the obstruction as the first of its kind since a July 2024 provisional understanding. China said it had conducted on-site monitoring and verbal warnings after the Philippines ignored Beijing's warnings. The 18 September Palawan ramming is a separate, earlier incident and is not this week's lead.
- **Houthi fire at Saudi cities:** The Saudi-led coalition said it intercepted six Houthi ballistic missiles directed at Taif and Yanbu on 24 September, and on 26–27 September intercepted two drones toward Riyadh and ballistic missiles toward Khamis Mushait. Ground damage and casualties from those intercepts were not independently confirmed in the wire reporting used here. A 19 September Riyadh intercept sits outside this window and is not merged into the 26–27 claims. The land-and-air war on Saudi territory is a separate map from the Hormuz merchant-casualty list.
- **Western Hemisphere designations:** On 22 September, on the sidelines of the UN General Assembly, President Trump met the Shield of the Americas coalition and pledged to use "unmatched military might" against drug cartels. Fifteen governments issued a joint statement of intent to impose asset freezes, visa restrictions and criminal measures against 24 listed groups, including MS-13, Tren de Aragua and major Mexican cartels. Brazil and Mexico have not joined. The statement is a political and legal signal, not evidence that those measures were enacted in every capital this week.
- **Sahel and Sudan:** Reuters reported on 21 September, citing security and diplomatic sources, that more than 100 Malian soldiers were killed in JNIM's 10 September overrun of the army camp at Dioura. The Malian army has not published a matching toll. The battle itself is not a 21–28 September event; this week's news is the first detailed wire confirmation. Separately, Reuters reported on 24 September that Sudan's Rapid Support Forces had intensified deadly drone attacks on government-held towns in North Kordofan.

Key Developments & Intelligence Assessment

Europe

HIGH

Russian strikes turned Kyiv's internet, fuel and industry into a week-long target set

What happened: The campaign was not a single raid. Overnight 21–22 September, regional governor Oleksandr Hanzha reported simultaneous industrial hits in Dnipro, Kryvyi Rih and Pavlohrad. Interpipe, Ukraine's largest pipe producer, said a ballistic missile struck a civilian industrial facility in Dnipro, killed four employees, wounded seven, damaged production equipment and forced a halt to operations. Ukraine's air force cited 212 drones and four cruise missiles in that barrage.

Kyiv was hit in successive waves. Reuters reported on 23 September that drones struck railway infrastructure, warehouses and fuel stations. Klitschko said two people were killed and 45 injured. Between 23 and 25 September, strikes damaged data centres and provider equipment. Ukraine's digital ministry put household internet losses after the 23 September attack at around 100,000. NetBlocks recorded partial losses on named providers including Kyiv Link, Pautina, Utels and Crazy Network. The Guardian reported on 26 September that a Friday strike on Datagroup offices in central Kyiv killed four people. Foreign Minister Andrii Sybiha described the targets as civilian infrastructure used for public warning. Russia's defence ministry claimed strikes on facilities it associated with Ukrainian defence and security services, including later a Vodafone data centre; those identities are Russian claims, not confirmed Ukrainian admissions.

Zelenskyy's weekly munitions figures describe volume, not a verified intercept table. On 27 September he said Russia had launched more than 2,200 attack drones, around 1,650 aerial bombs and 38 missiles in the preceding week. Subsequent AFP/AP/Reuters accounts of 27–28 September reported further fatalities in Zaporizhzhia and Kyiv, and a guided bomb in Kharkiv that injured more than 20 people, including children. The practical issue is not a nationwide internet collapse. It is the conversion of fuel retail, rail, factories and civilian connectivity — banks, warning systems, payment rails, office networks — into a repeated physical target set as winter approaches.

Why it matters: A two-hour restoration at one provider does not restore every dependent service. Named-provider status, plant-level shutdowns and local casualty figures are the relevant evidence. The 100,000-household figure is a ministry estimate for one attack window, not a standing outage total. For companies with staff or systems in Kyiv, Dnipro or Kharkiv, the operating question is whether a named site, rail spur or cloud region is up.

Poland recorded an airspace probe and opened a sabotage investigation the same week Denmark raised its hybrid warning

What happened over Braniewo: Poland's Armed Forces Operational Command said a Russian military Mi-8 helicopter flying from Kaliningrad entered Polish airspace north of Braniewo at 11:08 local time on 23 September, to a depth of about 300 metres, for 42 seconds. Fighter jets were scrambled. The command said the incident indicated that Russia was again testing Polish air-defence readiness. Depth and duration are Polish official figures. Intent is a Polish assessment.

What happened at Wola Krobowska: A fire broke out on the night of 23–24 September at a state-owned satellite station that transmits internet traffic, including Starlink-related connectivity used by institutions and, Polish officials said, by the Ukrainian army. The station remained operational. Gawkowski called the fire sabotage aimed at disrupting internet access. Tusk said he disliked labelling an event as sabotage versus accident without full certainty, "but it looks bad". On 25 September the National Prosecutor's Office said the fire was arson, that there was reasonable suspicion the perpetrators acted on orders of Russian special services, and that no one had been charged. That is an open criminal investigation, not a completed attribution.

Denmark put a number on the hybrid risk the same day. On 24 September the Danish Defence Intelligence Service assessed that Russia is likely to intensify hybrid activity against the West in coming months, including cyber attacks that cripple societal functions and sabotage with a high risk of casualties, and that there is a "low but growing risk" of a limited military attack against one or several NATO countries bordering Russia. NATO Secretary General Mark Rutte said the

alliance can handle sabotage and drone incidents. Supreme Allied Commander Europe Gen. Alexis Grynkeiwich told Reuters that NATO was stepping up intelligence-sharing and that a limited attack was "unlikely but something that we can't rule out". The Danish judgement is an intelligence assessment, not an observed attack.

Why it matters: A 42-second airspace violation, an arson investigation at a connectivity node, and a formal allied hybrid warning now sit in the same week. None of those facts is an Article 5 event. Together they change the baseline for companies that move staff, cargo or data through Poland, the Baltics and Denmark.

Intelligence Assessment

High Europe remains high because the Russia–Ukraine war imposed repeated physical damage on Kyiv's civilian internet, fuel and industrial layer, with confirmed fatal strikes on a major telecom operator and a named industrial employer, while Poland recorded an airspace violation and opened a sabotage investigation in the same week Denmark warned of intensified hybrid activity. Confidence is high in the strike reporting by Ukrainian officials, Interpipe and Reuters/AFP/AP, and in the Polish official statements cited. Confidence is lower in Russia's claimed target identities and in Zelenskyy's exact munitions totals. Russian authorship of the Wola Krobowska fire is suspected, not proven.

ALSO MONITORED THIS WEEK

- **Ground campaign continuity:** The last detailed open campaign assessment available for this report remains dated 20 September. No independently corroborated territorial change during 21–28 September is treated here as a fact. Local restoration notices and named-facility damage remain the better measure of business impact than front-line claim totals.
- **Kharkiv and Sumy:** AFP/AP/Reuters accounts published on 28 September described further urban casualties, including a guided bomb in Kharkiv that injured more than 20 people, among them children. These are additional days in the same campaign, not a separate war.
- **Danish cyber threat level:** Denmark raised its threat level for destructive cyberattacks from medium to high on 24 September, saying destructive attacks from Russia were likely. That is a national warning change, not evidence of a completed destructive attack on Danish networks this week.

Middle East**CRITICAL****IMO listed a Hormuz fatality as Washington rejected a seven-day reopening plan**

What IMO recorded: The Organization's highlighted list, updated on 24 September, named *LR Stephanie* (two seafarers injured) and *Al Maryah* (damage only) on 21 September, and *Cape Dao* on 23 September 15 nautical miles northeast of Khasab, with one seafarer fatality and no pollution. India's embassy in Muscat said one Indian seafarer was killed and 19 of 20 Indian nationals on board were rescued. IMO does not, in the public highlighted list, publish weapon type, fire state, or the evacuating navy. UKMTO issued attack warnings on 21 and 23 September; the full warning narratives were not independently extracted by publication time, and IMO's confirmed list is the public casualty source.

These are sequential events, not one incident. They occurred on two dates, involved different hulls and produced different casualty outcomes. Combining them into a single "Hormuz attack" would erase the distinction between a damage-only case, a strike with two injuries, and a strike with a fatality. Older IMO rows from 9–17 September belong to previous weeks. As at 24 September IMO had confirmed 85 incidents and 24 seafarer fatalities since the conflict began. The evacuation plan remains paused.

Trump rejected the diplomatic overlay on 26 September. He told reporters he had rejected an Iranian proposal, conveyed via Qatari mediators around the UN General Assembly, under which the strait would reopen and regional fighting would pause within seven days if Washington met conditions Iran said were already in the June memorandum of understanding. Iranian Foreign Minister Abbas Araghchi said Iran awaited a "definitive" official US response. Trump said he still liked making a deal but that this one was not acceptable. His remark that the United States already has "total control" of the strait is a presidential claim, not an IMO finding. Exact daily transit counts circulating in industry commentary were not independently verified against an official IMO product for this report and are not used.

Why it matters: A confirmed fatality northeast of Khasab changes the crew-risk calculation even if most remaining transits still complete. Insurers, charterers and security managers now have three named hulls in six days, a paused evacuation framework, and a public US rejection of a seven-day reopen plan. The relevant decision is vessel-specific: flag, ownership, cargo, AIS posture and routing. Three confirmed casualties do not prove that every tanker faces the same targeting condition, and they do not establish that the strait is closed.

Saudi air defences reported two Houthi waves, including fire directed at Riyadh

What happened: On 24 September the Saudi-led coalition said it had intercepted six ballistic missiles aimed at Taif and the Yanbu area on the Red Sea. Houthi officials later that day claimed attacks on a "sensitive target" in Riyadh and on Aramco facilities in Yanbu; Saudi civil defence did not issue a Riyadh emergency alert that Thursday, and there was no immediate Saudi confirmation of a Riyadh impact. On 26–27 September the coalition said it had intercepted two drones toward Riyadh and ballistic missiles toward Khamis Mushait. GCC Secretary-General Jasem Albudaiwi condemned the later fire. A Houthi political bureau member called the operation a small-scale rehearsal for wider escalation. That is a claimant statement, not evidence of a completed wider campaign.

Ground damage from the 24 and 26–27 September waves was not independently confirmed in the wires used here. The 19 September Riyadh intercept is pre-window and is not merged into this week's claims.

On the Yemeni coast, the usable in-window civilian figure is Mokha. Associated Press reported on 22 September that the Houthi-run health ministry said at least six people, including two children and a woman, were killed in airstrikes that day in Mokha, which Houthi forces captured earlier in September. The seizure of Mokha around 10 September is older context. Two-day battle tallies circulating in campaign compilations were not independently counted by a wire and are not used.

Why it matters: Missile and drone fire at Riyadh, Taif, Yanbu and Khamis Mushait is a different operating problem from merchant casualties in Hormuz. For companies with staff, aircraft or energy offtake in the kingdom, the relevant evidence is

whether civil-defence alerts, airport status and Aramco facility notices change after an intercept claim. Aden and Hormuz remain separate maps. No new named IMO Red Sea merchant hull casualty dated 21–28 September was confirmed for this report.

Intelligence Assessment

High The Middle East remains critical because IMO confirmed a seafarer fatality and two further merchant casualties in the Strait of Hormuz in the same week the United States publicly rejected a seven-day reopening plan, while Saudi air defences reported two Houthi waves that included fire directed at Riyadh. Confidence is high in the IMO hull distinctions and in Trump's 26 September rejection as reported by Reuters and BBC. Attribution of the Hormuz strikes is unestablished in the IMO list. Confidence is medium that every Houthi projectile was destroyed with no damage. Southern Lebanon produced no Reuters/AP/IDF-confirmed major new kinetic lead in this window.

ALSO MONITORED THIS WEEK

- **Lebanon continuity:** Hezbollah secretary-general Naim Qassem, speaking around the Nasrallah killing anniversary, said Israel had been unable to "break the resistance", according to AFP. No independent confirmation was obtained of a large new Israeli ground operation between 21 and 28 September. Local hospital and road status, not anniversary rhetoric, is the movement-relevant fact.
- **Mokha airstrike reporting:** The Houthi-run health ministry's account of six killed on 22 September, carried by AP, is the usable in-window civilian figure. It should not be added to older WHO ministry tables covering 6 August to 18 September, and it does not explain the Hormuz merchant casualties.
- **Red Sea / Gulf of Aden:** No new official IMO-listed Red Sea merchant casualty for 21–28 September is treated as a confirmed incident in this report. Unverified claims of island seizures or Bab al-Mandab traffic collapse are not used.

Africa

HIGH

Wire reporting this week put a number on the 10 September Dioura overrun while Sevare stayed under pressure

What happened: Reuters reported on 21 September that two sources said jihadists killed more than 100 Malian soldiers in the 10 September attack on the army camp at Dioura. A security source said 130 soldiers died and more than 100 were taken hostage. A diplomatic source said around 120 were killed. JNIM had claimed 150. The Malian army said on 20 September that an operation lasting more than a week had seen "some of our brothers-in-arms" fall while inflicting losses on the attackers. It has not published a matching toll. Associated Press, in 19 September reporting, noted JNIM videos of captured soldiers; the army spokesman declined to comment on numbers.

Dioura is not a 21–28 September battle. The camp was overrun on 10 September. This week's development is the first detailed Reuters confirmation, with a 120–130 band from unnamed sources and no official FAMa figure. JNIM's April–summer nationwide offensive remains structural context, not this week's lead.

Sevare is the in-window pressure point. JNIM on 20–21 September claimed strikes on air-defence systems at Sevare airport and 33 pro-government deaths in Sevare and Konna. A resident told Reuters of six consecutive nights of shelling and about 40 wounded Malian and Russian fighters in hospital. The army did not comment on those numbers. A 22 September aggregator claim that JNIM had taken a FAMa post at Yanfolila was not corroborated by Reuters, AFP or an official Malian statement and is not used.

Why it matters: A garrison-destroying raid, even when dated 10 September, changes the force-protection picture for anyone still moving through central Mali. For organisations with staff or aircraft near Mopti–Sevare, the relevant evidence is whether the airport remains usable after claimed air-defence strikes and whether road movement after dark is still attempted.

Sudan's RSF intensified drone strikes on government-held towns in North Kordofan

What happened: Reuters reported on 24 September, from Um Ruwaba, that Sudan's Rapid Support Forces had intensified deadly drone attacks on government-held towns in North Kordofan. Reuters filmed the aftermath of major attacks earlier in the month. The UN was cited as saying drone attacks by both sides killed more than 1,000 civilians in the first half of 2026. An 8 September courtroom strike in Um Ruwaba is older context for that campaign, not a 21–28 September incident. Claims of a 25 September SAF recapture of Sowdari and of 17 civilians killed in an SAF market strike in al-Mazrub were not retrieved from a wire and are not used.

Why it matters: North Kordofan is now a drone-exposed front. For organisations with staff in El Obeid or Um Ruwaba, the relevant evidence is whether markets, courts and clinics are still being used in the open. The first-half UN figure of more than 1,000 civilian drone deaths is a 2026 cumulative, not this week's count.

Intelligence Assessment

Medium Africa is rated high because this week's Reuters reporting confirmed a garrison-scale JNIM blow at Dioura, Sevare remained under claimed and locally reported fire, and RSF drone attacks on government-held towns in North Kordofan intensified. Confidence is medium on the 120–130 Dioura death band, which rests on unnamed sources; the Malian army has not published a matching figure. The rating is geographically bounded: central Mali and North Kordofan, not a uniform continental deterioration. A REACH assessment published this week described Emergency-level conditions in Lafon County from August fieldwork; that is a published baseline, not a 21–28 September famine event.

ALSO MONITORED THIS WEEK

- **Lafon County, South Sudan:** A REACH rapid assessment published on 23–24 September, based on key-informant interviews in mid-August, described an exceptionally severe lean season in Eastern Equatoria after a large-deficit 2025 harvest. FEWS NET's August outlook had already placed Lafon in Emergency (IPC Phase 4). Those products were issued or recirculated this week; the underlying crop failure is not a new weekly shock.
- **Yanfolila claim:** A 22 September claim that JNIM had captured a Malian army post at Yanfolila remains uncorroborated at wire or official level and is held as a watch item, not a fact.

Asia

ELEVATED

China forced the abort of a Philippine resupply run to Second Thomas Shoal

What happened: On the evening of 24 September, while the supply ship *M/V Lapu-Lapu* and Philippine Navy and Coast Guard escorts were about 60 nautical miles from Ayungin (Second Thomas) Shoal, Chinese navy and coast-guard vessels interfered with a rotation-and-resupply mission to BRP *Sierra Madre*. The Armed Forces of the Philippines said three PLAN warships, including two Houbei-class missile boats, and five China Coast Guard vessels took part. Philippine Coast Guard spokesperson Jay Tarriela said a CCG ship closed to about 1,000 yards in a dangerous manoeuvre. There was no collision and no injury. The mission was suspended late that evening for personnel safety. Manila said the obstruction broke a period of incident-free resupply under a July 2024 provisional understanding.

Beijing gave a competing official account. China Coast Guard spokesperson Jiang Lue said the Philippines had ignored Beijing's warnings, prompting on-site monitoring and verbal warnings. The United States, in a 27 September statement by Ambassador Lee Lipton, condemned "dangerous blocking and other irresponsible maneuvers" that it said had threatened a collision and prevented a lawful resupply. "First since July 2024" is a Philippine characterisation; China disputes the legal framing of the mission. The 18 September Palawan incident, in which the Philippine Coast Guard accused a China Coast Guard cutter of ramming a Bureau of Fisheries vessel, is a separate earlier clash and is not merged with this RORE.

Why it matters: An aborted resupply 60 nautical miles from the shoal, without a collision, still changes the sustainment calculation for the *Sierra Madre* garrison. Philippine officers said harassment that used to begin around 10 nautical miles from the feature is now occurring much farther out. The usable facts this week are no collision, no injury, mission suspended, and competing official narratives. They do not include a general closure of commercial sea lanes.

Citrix NetScaler zero-days put customer-managed gateways under a 30 September federal clock

What happened: On 27 September Citrix published security bulletin CTX697096 covering eight NetScaler ADC and Gateway flaws. CISA added CVE-2026-88771 and CVE-2026-88772 to the Known Exploited Vulnerabilities catalogue the same day, stating it had received reports and partner intelligence confirming global exploitation. Both can independently enable remote code execution. CVE-2026-88771 is unauthenticated command execution on customer-managed ADC and Gateway builds before 14.1-73.37 and 13.1-64.23. CVE-2026-88772 is a memory-buffer flaw leading to code execution or denial of service. CISA set a 30 September due date for covered US federal civilian agencies and required forensic triage. CERT-EU, Ireland's NCSC and Canada's CCCS issued same-day alerts. Citrix-managed cloud and Adaptive Authentication are generally carved out; Secure Private Access Hybrid instances are in scope. CISA listed ransomware use as unknown.

This is not a statement that every appliance on the internet is owned. Citrix's wording, restated by national CSIRTs, is that exploits were observed on unmitigated deployments. On 25 September CISA had separately added Microsoft SharePoint CVE-2026-65660 and MikroTik RouterOS CVE-2026-67279 to the KEV catalogue. Those are additional exploited flaws, not part of the NetScaler cluster.

Why it matters: NetScaler sits in front of VPN, ADC and hybrid access for a large share of enterprise and government networks. An unauthenticated RCE with a three-day federal clock is a perimeter event. The 30 September date is a US federal civilian deadline, not a universal private-sector legal deadline.

Intelligence Assessment

High Asia is elevated because Chinese navy and coast-guard vessels forced the abort of a Philippine resupply to Second Thomas Shoal on 24 September, without collision or injury, while two globally exploited NetScaler zero-days with a 30 September federal remediation date landed on 27 September. Confidence is high in the competing official accounts of the aborted mission and in CISA's KEV listing. "First since July 2024" is a Philippine characterisation China disputes. North Korea's 20 September missile tests sit one day outside the window and are monitored, not treated as a 21–28 first-use event.

ALSO MONITORED THIS WEEK

- **North Korea, 20 September:** South Korea's Joint Chiefs of Staff said North Korea fired two short-range ballistic missiles from the Wonsan area on 20 September, flying about 450 km and more than 600 km into the East Sea / Sea of Japan, both landing outside Japan's EEZ. Seoul later questioned Pyongyang's claim that the tests involved a new "ultra-modern" system. The launches are week-boundary events; the 22–23 September characterisation dispute is in-window.
- **Nepal identification:** On 26 September, one month after the 26 August Bhotekoshi–Trishuli floods, NDRRMA said at least 1,453 people had died and 5,285 remained unaccounted for, with only a small fraction of recovered bodies identified. This is an identification and holding-centre update, not a new flood pulse.
- **SharePoint and MikroTik:** CISA's 25 September KEV additions (CVE-2026-65660 and CVE-2026-67279) are a separate exploited-flaw pair from the NetScaler cluster. They share a catalogue and a short federal clock, not a common vulnerability.

Latin America / Caribbean

ELEVATED

Fifteen Shield of the Americas governments announced intent to target 24 listed groups

What happened: On 22 September, on the sidelines of the UN General Assembly in New York, President Trump met leaders and foreign ministers of the Shield of the Americas coalition. Reuters reported that he pledged to use "unmatched military might" against threats in the region and urged the group to designate 24 narcotrafficking organisations as common threats. He told the General Assembly that cartels were "the ISIS of the Western Hemisphere". The governments of the United States, Argentina, Bolivia, Chile, Colombia, Costa Rica, the Dominican Republic, Ecuador, El Salvador, Guyana, Honduras, Panama, Paraguay, Peru and Trinidad and Tobago then issued a *Joint Statement on Defending Hemispheric Sovereignty*. They declared their intention, as applicable and in accordance with their own legal obligations, to impose asset freezes, immigration and visa restrictions, and criminal liability for knowing material support, focused on 24 listed organisations including MS-13, Tren de Aragua, Carteles Unidos, Gulf Cartel, CJNG and the Sinaloa Cartel. They also said they intended to request an OAS meeting of consultation under the Rio Treaty.

Implementation is not this week's fact. Brazil and Mexico have not joined. No corroborated country-wide armed-campaign shift in Colombia, Ecuador or Mexico was established for 21–28 September from the sources used here. UN experts' criticism of US boat strikes in the Caribbean and eastern Pacific is a related but separate legal track and is not treated as an adjudicated casualty finding. The 15 September US presidential determination on Venezuela's drug-control category was issued before this window.

Why it matters: A 15-government statement of intent, issued beside the General Assembly and tied to the Rio Treaty, changes the political and compliance weather for companies that bank, insure or ship across the listed jurisdictions. It does not, by itself, close a port or freeze a named account. The watch item is whether individual capitals convert intent into lists, and whether Brazil and Mexico remain outside.

Haiti's Gang Suppression Force mandate sits on a 30 September clock

What happened: CARICOM on 27 September called on the UN Security Council to renew the mandate of the Gang Suppression Force in Haiti, saying the force has yet to be fully deployed and that its mandate is expected to expire at the end of September. The GSF was authorised by Security Council resolution 2793 (2025) with an authorised ceiling far above current deployed strength. A September joint statement by OAS member states, Canada and the United States supported renewal and full deployment. US and Panama, as Council co-penholders, were expected to seek re-authorisation.

Why it matters: A mandate that expires at the end of the month, while deployed strength remains well below the authorised ceiling, is a political-security clock, not a completed reinforcement. For organisations with staff or flights into Port-au-Prince or Cap-Haïtien, the relevant evidence remains airport and road status.

Intelligence Assessment

Medium Latin America and the Caribbean remain elevated because a 15-government Shield of the Americas statement of intent on 22 September created a new hemispheric designation track against 24 listed groups, while Haiti's Gang Suppression Force mandate approached a 30 September expiry with the force still well below its authorised ceiling. Confidence is high that the New York meeting and joint statement occurred. Confidence is medium on near-term operational effect, because implementation in each capital is unconfirmed and Brazil and Mexico remain outside. Venezuela's June earthquakes remain a recovery condition restated this week, not a fresh seismic event.

ALSO MONITORED THIS WEEK

- **Venezuela recovery restatement:** Amnesty International on 23 September, citing official figures three months after the 24 June earthquakes, recorded 6,509 deaths, 60,785 assessed homes and 11,001 dwellings classed as high risk, with a split between national and La Guaira totals. Those are three-month official numbers published into this week, not a 21–28 September disaster.
- **Haiti elections delay:** CARICOM noted that elections originally planned for August 2026 can no longer be met and that voter registration began only in July. The electoral timetable is now a function of the security and mandate discussion, not a separate incident.
- **Non-members:** Brazil and Mexico's absence from the Shield statement is the principal limit on hemispheric coverage of the 22 September measures. Their domestic legal processes are not inferred from the New York text.

Global Intelligence Assessment

The week's central pattern is that chokepoints — a strait, a capital's internet, a remote-access gateway, a shoal resupply, a garrison in central Mali — were hit, forced offline or confirmed destroyed while the underlying wars continued. Hormuz produced a named IMO fatality northeast of Khasab in the same week Washington rejected a seven-day reopen plan. Kyiv's data centres, fuel stations and a pipe plant were hit on successive days. CISA put a 30 September clock on two exploited NetScaler zero-days. None of these is one campaign.

Network effects should not be mistaken for common causation. The Hormuz casualties, the Kyiv drone strikes, the NetScaler exploits and the Second Thomas abort all disrupt movement or access. They do not share an actor, a weapon or a vulnerability. Houthi fire at Saudi cities and IMO-listed merchant casualties in the strait occurred under the same regional heading and must stay on separate maps. JNIM's Dioura overrun and RSF drones in North Kordofan are African wars with different patrons, different weapons and different clocks.

Diplomacy this week did not reopen anything that companies actually use. Trump's rejection leaves the abnormal Hormuz traffic pattern in place. The Shield of the Americas statement creates a compliance track without a demonstrated freeze. CARICOM's GSF appeal lands days before a mandate expiry. Denmark described a low but growing risk of a limited attack on a NATO neighbour; Poland's 42-second incursion and an open arson investigation are the local texture of that warning, not proof of the attack itself.

The overall outlook is concentrated crises linked through shipping, connectivity and political designation, not a single global escalation path. Europe's war is eating Kyiv's civilian internet and probing NATO's flank. The Middle East combines a lethal strait with Houthi fire at Saudi cities and a rejected ceasefire timetable. Africa's sharpest weekly picture is a confirmed garrison loss in Mali and an intensified drone campaign in North Kordofan. Asia carries an aborted South China Sea resupply and a global cyber event. Latin America is inside a US-led designation drive and a Haiti mandate clock.

Watch Indicators

- **Hormuz:** A new IMO hull addition, a further casualty or pollution finding, or an official change to the paused evacuation framework would alter the transit picture. Exact daily transit counts will be used only if an official product publishes them.
- **Diplomatic track:** An official US reply that Iran would accept as "definitive", or a restated Iranian proposal, would change the political overlay without restoring normal traffic.
- **Kyiv networks:** Named-ISP restoration notices, a further fatal strike on a telecom site, or a ministry outage figure materially above 100,000 households would define whether the data-centre campaign is episodic or cumulative.

- **Poland and Denmark:** A charging decision or a finding of accident at Wola Krobowska would settle whether the satellite-station fire belongs in the Ukraine-connectivity picture. A further airspace violation would change the eastern-flank baseline.
- **NetScaler:** CISA or Citrix indicators on internet-facing appliances, or a named-victim disclosure, would move CVE-2026-88771/88772 to organisation-specific impact. The 30 September KEV due date is a federal clock, not a universal private-sector legal deadline.
- **Second Thomas:** A completed follow-on RORE, a collision or an injury would change the 24 September abort from a sustainment delay into a casualty event.
- **Saudi intercepts:** A confirmed ground impact in Riyadh, Yanbu, Taif or Khamis Mushait would move this week's waves from claimed intercepts to demonstrated damage.
- **Mali, Sudan and the GSF:** A Malian army figure matching or contradicting the 120–130 Dioura band, a wire-confirmed North Kordofan event after 24 September, or a Security Council decision on Haiti's mandate around 30 September would update those files.

Glossary of Abbreviations

- **ADC:** Application Delivery Controller.
- **CCG:** China Coast Guard.
- **CISA:** Cybersecurity and Infrastructure Security Agency, United States.
- **CVE:** Common Vulnerabilities and Exposures identifier.
- **FAMa:** Forces Armées Maliennes (Malian Armed Forces).
- **GSF:** Gang Suppression Force (Haiti).
- **IMO:** International Maritime Organization.
- **IPC:** Integrated Food Security Phase Classification.
- **JNIM:** Jama'at Nusrat al-Islam wal-Muslimin.
- **KEV:** Known Exploited Vulnerabilities catalogue.
- **NDRRMA:** National Disaster Risk Reduction and Management Authority, Nepal.
- **OAS:** Organization of American States.
- **PLAN:** People's Liberation Army Navy.
- **RCE:** Remote code execution.
- **RORE:** Rotation and resupply (Philippine mission type).
- **RSF:** Rapid Support Forces (Sudan).
- **UKMTO:** United Kingdom Maritime Trade Operations.

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Method Note

This report separates verified incident details, official or institutional estimates and analytical judgements. Casualty, displacement, outage and exposed-system figures retain their source dates and units. Where attribution, hull identity, weapon type, breach scope or geographical reach was not established, the text states that limit.

This report is based on open-source material reviewed up to 28 September 2026 and analytical assessment by SF Custos Global. It does not replace legal, insurance, sanctions, medical or country-specific professional advice.