



AMERICAN UNIVERSITY REPOSITORY  
for OPEN SOURCE RESEARCH & ANALYSIS  
SCHOOL of PUBLIC AFFAIRS

# The Keogram

Spring 2026



**American University School of Public Affairs**  
4400 Massachusetts Ave NW, Washington, DC 20016



# Table of Contents

AURORA Training Directorate	<b>04</b>
AURORA Editorial Board	<b>05</b>
AURORA Division Chiefs	<b>06</b>
Africa Division	<b>07</b>
East Asia Pacific Division	<b>22</b>
Eurasia Division	<b>43</b>
Europe Division	<b>51</b>
Near East Division	<b>61</b>
South and Central Asia Division	<b>78</b>
Western Hemisphere Division	<b>102</b>
Rising Practitioners	<b>127</b>



# Introduction

---



## Dr. Tricia Bacon     Director, AURORA

Tricia Bacon, PhD, is a Professor at American University, jointly appointed to the School of Public Affairs and School of International Service. She also directs AURORA, American University's Open Source Intelligence & Analysis Hub. She is the author of *The Counterinsurgency Dilemma* with Stanford University Press, *Terror in Transition: Leadership and Succession in Terrorist Organizations* with Columbia University Press in 2022, and *Why Terrorist Organizations Form International Alliances* published with University of Pennsylvania Press in May 2018.

Dr. Bacon is a non-resident associate fellow with the International Centre for Counterterrorism and a Senior Associate (non-resident) with the Transnational Threats project at Center for Strategic and International Studies. She serves on the Countering Terrorism & Extremism Program Advisory Council for the Middle East Institute and the editorial board of *Studies in Conflict and Terrorism*, *Terrorism and Political Violence*, *Perspectives on Terrorism*, and *The Journal of the Middle East and Africa*.

Her research focuses on terrorist and insurgent groups' behavior and decision-making, U.S. counterterrorism policy, and the role of intelligence in national security decision-making. She has published articles on terrorist group alliances, terrorist leadership, terrorist safe havens, and other related topics.



## Jacob Fields     Director of Operations, AURORA

Jacob Fields serves as the Director of Operations and Chief of Staff for AURORA, American University's Open Source Intelligence & Analysis Hub, where he leads strategic planning, recruitment, workflow management, and assists with the training and production of the Keogram. He supports the center's launch and foundational operations as deputy to the Director. Jacob is pursuing a dual graduate degree at American University: a Master of Science in Terrorism and Homeland Security Policy and a Graduate Certificate in Cyber Policy and Management. Jacob brings hands-on operational and analytical experience to his role.

Jacob brings experience as an Intelligence Analyst, OSINT Investigator, and WATCH Officer at The Counterterrorism Group, where he conducts counterterrorism intelligence analysis focused on EUCOM threat activity and helps facilitate the Daily Threat Assessment. He also serves as a Security and Protection Agent, supporting executive and VIP protection, and holds multiple CISA and DHS certifications covering threat assessment, active-shooter response, and IED awareness. Additionally, Jacob serves as Program Committee Chair for the ASIS International National Capital Chapter.

His work spans intelligence analysis, open-source collection, and security operations, with a focus on building a professional, mission-driven organization at the heart of national security practice.



# AURORA

## Training Directorate



**Wilson Carruthers**  
*Director of Law  
and Ethics*

**Thomas Gormley**  
*Director of Law  
and Ethics*

Thomas is a graduate student in SIS's US Foreign Policy and National Security program. Since moving to DC, he has interned with the Center for European Policy Analysis and the Foundation for Defense.



**Skylar Hathorn**  
*Director of  
Communications*

Skylar is currently a graduate candidate in the SIS' US Foreign Policy and National Security program. Prior to her graduate studies, she worked in municipal government in New Hampshire.

**Ria Nair**  
*Director of  
Analytic Tradecraft*

Ria is pursuing an M.A. in U.S. Foreign Policy and National Security at SIS. She has published on U.S.-Latin America relations and India's strategic engagement with the Western Hemisphere.



**Morgan Tadych**  
*Director of Mentorship*

Morgan Tadych is a Master of International Service candidate at SIS, focusing on peace and conflict resolution. Morgan served as a U.S. Army officer for 8 years in the intelligence field, pivoting to work in OSINT in the private sector.

**Sonia Tegang**  
*Director of Security*

Sonia Tegang is a graduate student at the School of International Service, focusing on U.S. national security and foreign policy. She serves on AURORA's Training Directorate, where she developed the curriculum that prepares analysts for publication.



**Adriana Termeer**  
*Director of Collection*

Adriana is pursuing a Master's Degree in Terrorism and Homeland Security Policy with a certificate in Cybersecurity through SPA. Prior to her graduate studies, she has worked in U.S. government, corporate law, and research.





# AURORA

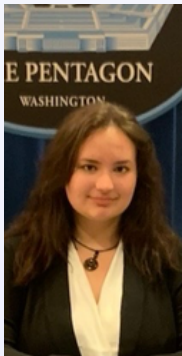
## Editorial Board

### William Parnell

*Editor in Chief*

William Parnell is AURORA's Editor in Chief, a Junior currently studying Political Science in the School of Public Affairs. William leads the successful organization, standardization, and publishing of AURORA's flagship product, the Keogram.

William is also currently interning as an Analyst for SafeAbroad, practicing risk assessment and OSINT for study abroad programs.



### Julia Alexander

*Staff Editor*

Julia Alexander is a Master's student studying Global Governance, Politics, and Security. She conducted several independent research projects with the support of the University of Pittsburgh on Finnish defense capabilities and security strategy.

### Joseph Garbowski

*Director of Technology*

Joseph Garbowski works as a growth operations analyst at Ridgeline International tackling ubiquitous technical surveillance threats. Joe has previously worked for the DCSA, DoJ, and several bipartisan lobbying firms.



### Sara Huta

*Staff Editor*

Sara Huta is a Master's student focusing on U.S. Foreign Policy and National Security. She works as a Research Analyst, examining domestic political trends and foreign relations related to emerging technologies and their role in advancing the U.S. tech sector.

### Jacob Fields

*Chief of Staff*

Jacob Fields serves as the Director of Operations and Chief of Staff for AURORA, supporting its launch and foundational operations. As Chief of Staff, Jacob assists and guides analysts in their teams' work and organizes staffing for AURORA.



### Joey Stabile

*Director of Analysis*

Joey Stabile is a PhD student in the Department of Justice, Law, and Criminology at American University's School of Public Affairs. Prior to his PhD studies, he worked in the non-profit and public research sectors, supporting programs to prevent violent extremism.

### Marlee Warwick

*Director of Publication*

Marlee Warwick is a Masters student studying US Foreign Policy and National Security. Prior to her time at American, she worked in Congress for three years. She has conducted research on foreign influence campaigns through the Foreign Policy Research Institute.





# AURORA

## Division Chiefs



**Samuel Goodpaster**  
*South and Central  
Asia*

Samuel Goodpaster serves as the Division Chief for South and Central Asia, and is a current Master's Candidate in the Terrorism and Homeland Security Policy Program in the School of Public Affairs.

**Matthew Laubsted**  
*Eurasia*

Matthew Laubsted is AURORA's Division Chief for Eurasian affairs, coordinating the work of researchers, analysts, and team leads to deliver a polished and professional analytic product.



**Skylar Hathorn**  
*Near East*

Skylar is AURORA's Near East Division Chief. Skylar received her Bachelor's degree in Criminal Justice and Psychology from Suffolk University, Boston, and worked in municipal government in New Hampshire.

**Ria Nair**  
*Western  
Hemisphere*

Ria is pursuing an M.A. in U.S. Foreign Policy and National Security at SIS. She has published on U.S.-Latin America relations and India's strategic engagement with the Western Hemisphere.



**Evan Miller**  
*East Asia Pacific*

Evan is a graduate student in AU's U.S. Foreign Policy program. He graduated from The Ohio State University, where he majored in World Politics and History. Evan is interested in how states interact within a rapidly shifting international relations environment.

**Thomas Gormley**  
*Europe*

Thomas is a graduate student in the Foreign Policy and National Security program. He interned with the Center for European Policy Analysis and the Foundation for Defense of Democracies. He has worked at AU's Center for Israel Studies and Khan Institute for Cyber and Economic Security.



**Hayley Page**  
*Rising Practitioners*

Hayley Page holds an M.S. in Terrorism and Homeland Security Policy and a B.A. in Public Health from AU. She is the Co-Founder and Director of the Rising Practitioners program. She has worked with multiple government agencies and currently supports the Department of War.

**Elena Steinmuller**  
*Africa*

Elena is a Master's student in Terrorism and Security Policy at American's School of Public Affairs. She serves as the Division Chief for Africa.





# Africa Division



### Alliance of Sahel States' Counterterrorism Capabilities Not Likely to Improve Despite Promises of Russian Aid

Author: Lisa Walker, Charlie Flanagan  
Division Chief: Elena Steinmuller & Team Lead: Delaney Redmond  
Editor: Joe Garbowski  
Graphic Designer: Elena Steinmuller

---

*We assess with moderate confidence that militant groups Jama'at Nusrat al-Islam wal Muslimeen (JNIM) and Islamic State Sahel Province (ISSP) will demonstrate increasingly sophisticated capabilities in the next 3-6 months, allowing them to expand territorial control despite state counterterrorism efforts.* JNIM and ISSP (formerly known as Islamic State in the Greater Sahara) conducted six out of the top ten deadliest global terrorist attacks in 2025.<sup>i</sup> The groups' ability to target capital cities shows their increasing threat to government stability, which is highly likely to lead to cascading instability across West Africa.

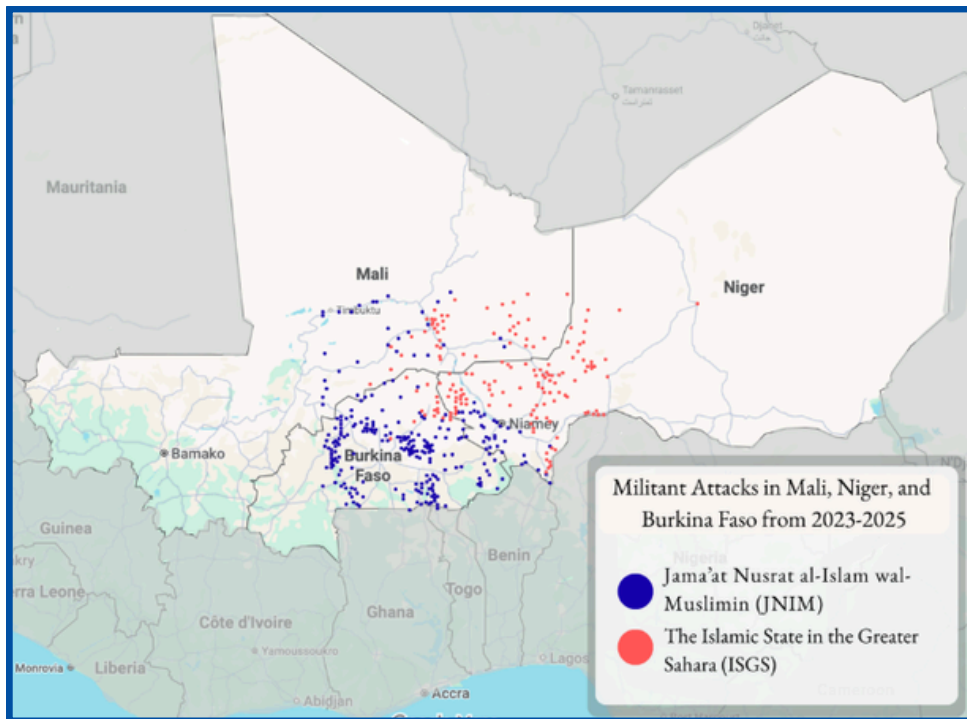
- In November 2025, JNIM besieged Bamako using well-coordinated attacks on oil convoys, effectively cutting off the city's oil supply, according to a source with second-hand access and a reliable track record.<sup>ii</sup>
- ISSP attacked government and civilian aircraft at the national airport and collocated air force base in Niamey on 29 January 2026, using drones in combination with ground assault forces, according to a second-hand report from a reliable research database.<sup>iii</sup>

*We assess with moderate confidence that Russia will provide limited military support to Alliance of Sahel States (AES) countries over the next 3-6 months, indicating that Russia prioritizes regional influence over countering the terrorist threats eroding security in AES countries.* After pledging to provide counterterrorism support to AES countries Mali, Niger and Burkina Faso, Russia signed a formal defense cooperation memorandum with AES in 2025.<sup>iv</sup> Neither Russian nor AES officials have made details of this agreement public.

- Recently leaked Russian documents detail Russian influence campaigns in AES countries in 2024. These campaigns focused on countering Western influence and enhancing Russian economic opportunities, according to a reliable western news source with direct access to the documents.<sup>v</sup>
- In 2025, Russia provided two SU-24 bomber aircrafts to Mali, according to a credible research organization that tracks arms transfers, though a Malian defense official told a local news outlet that the military was using Russian-provided aircraft for surveillance vice airstrikes.<sup>vi</sup> A separate Malian news source reported on the January 2025 arrival of tanks, armored vehicles and 4x4 trucks, but it is unclear if the armory is for Africa Corp or Malian security services.<sup>vii</sup> These aircraft, tanks, and vehicles will not be sufficient to address the AES's capability shortfalls, based on the assessments of a reliable research center.<sup>viii</sup>
- Russia continues to provide advisory support via the Africa Corps, without increasing the number of advisors, according to a Russian official cited in an African news source.<sup>ix</sup>



# Africa: Military and Cyber



*Attack locations attributed to JNIM and ISGS illustrate an increasing extremist threat in the Sahel.<sup>x</sup>*

## Source Summary Statement

The evidence of the increased number and sophistication of terrorist group attacks in the Sahel is based on reporting from well-respected and detailed sources, and we have high confidence in the reporting. The reporting on specific Russian support was limited to West African news sources whose veracity and reliability is unknown; our confidence level on these sources is moderate. We have several remaining intelligence gaps: the specifics of the defense cooperation memorandum between AES and Russia, whether Russia intended the reported vehicles for the Malian military or Africa Corps, and whether other equipment has been provided.



# Africa: Military and Cyber

---

## Notes

<sup>i</sup> Institute for Economics and Peace | <http://economicsandpeace.org/wp-content/uploads/2026/03/Global-Terrorism-Index-2026-Report.pdf> | Global Terrorism Index 2026 | March 2026

<sup>ii</sup> The Wall Street Journal | YouTube | <https://www.youtube.com/watch?v=rPVv0yQSHKA> | How al Qaeda Stands on the Brink of Toppling This Government | 18 November 2025

<sup>iii</sup> Janes | <https://customerportal.janes.com/entity/analysis/0006pOPJdsIrnVYtIyN0du> | Islamic State affiliate attack on Niamey airbase indicates further attacks likely in the short term | 4 February 2026

<sup>iv</sup> African Press Agency | <https://apanews.net/russia-helping-to-train-aes-armed-forces-official/> | Russia helping to train AES armed forces – Official | 27 February 2025; African Security Analysis | <https://www.africansecurityanalysis.org/updates/russia-aes-military-cooperation-developments-and-regional-context> | Russia–AES Military Cooperation: Developments and Regional Context | 19 August 2025; Politics Today | <https://politicstoday.org/russia-deepens-ties-with-sahel-countries-in-military-talks/> | Russian Deepens Ties with Sahel Countries in Military Talks | 15 August 2025

<sup>v</sup> François Mazet, RFI | <https://www.rfi.fr/en/international/20260403-leaked-files-reveal-russia-s-blueprint-to-expand-sahel-alliance> | Leaked files reveal Russia's blueprint to expand African Sahel alliance | 3 April 2026

<sup>vi</sup> Stockholm International Peace Research Institute | <https://www.sipri.org/databases/armstransfers> | SIPRI Arms Transfers Database | March 11, 2026; Confidence Ubani, West Africa Weekly | <https://westafricaweekly.com/aes-partnership-with-russia-yields-tangible-results-in-2024-malian-official-reveals/> | AES's Partnership with Russia Yields Tangible Results in 2024 | 13 December 2024

<sup>vii</sup> Ekene Lionel, Military Africa | <https://www.military.africa/2025/01/russia-continues-arming-mali-supplies-heavy-armored-vehicles/> | Russia continues arming Mali, supplies heavy armored vehicles | 18 January 2025

<sup>viii</sup> Janes | <https://customerportal.janes.com/entity/country/5NEPE7pxMKl7vOCd2YItFP/fragment/6iMyPURw4gm6nOXTkBT8RV> | Burkina Faso Armed Forces | 2020 ; Janes | <https://customerportal.janes.com/entity/country/12h83oMMcqBZhAaLguqm4T/fragment/1uERpXgBrwGHWtQ1boOR48#> | Mali capability assessment | 2024 ; Janes | <https://customerportal.janes.com/entity/country/2ZFPPe4arKETjReg9hBvpR/fragment/4ZdVseS3gm0xBnCFo7B6wV> | Niger capability assessment | 2020

<sup>ix</sup> Kazim Abdul, Military Africa | <https://www.military.africa/2025/04/russia-to-support-5000-strong-joint-aes-force/> | Russia to support 5000-strong joint AES force | 7 April 2025

<sup>x</sup> Canva | <https://canva.link/3tem0x73u2g0lf6> | Canva design (shared project link) | 29 March 2026; Google | <https://www.google.com/maps/@13.6678658,-0.0692328,5.34z> | Google Maps (Map view of specified coordinates) | 29 March 2026; Armed Conflict Location & Event Data Project (ACLED) | <https://acleddata.com/report/new-frontlines-jihadist-expansion-reshaping-benin-niger-and-nigeria-borderlands> | New frontlines: Jihadist expansion is reshaping the Benin, Niger, and Nigeria borderlands | 27 March 2025



## Somali Federal Government (FGS) Likely Transforming Security Partnerships

Author: Aidan Skidds, Catherine Hany

Division Chief: Elena Steinmuller & Team Lead: Emma Pohl

Editor: Joe Garbowski

---

*We assess with high confidence that the FGS will expand security relationships with Qatar and Saudi Arabia in the next 3-6 months to more permanently address current security gaps exacerbated by the United Arab Emirates's (UAE) suspension of security assistance.* FGS Defense Minister Ahmed Ma'alin Fiqi and Qatari Defense Minister Saoud bin Abdulrahman al Thani previously discussed strengthening bilateral military cooperation during a June 2025 meeting.<sup>i</sup> But the effort took on more momentum after the FGS canceled all existing port security and defense cooperation agreements with the UAE on 12 January 2026.<sup>ii</sup> The FGS move came after the UAE declined to sign a joint statement in December 2025 with other Arab and Muslim countries condemning Israel's official recognition of Somaliland.<sup>iii</sup> The UAE on 17 January 2026, responded by suspending five million USD in monthly funding covering salaries for 3,800 FGS security personnel with jurisdiction over Mogadishu, fuel, medical services, food supplies, and equipment maintenance.<sup>iv</sup> Somalia reportedly participated in trilateral defense talks with Saudi Arabia and Egypt that same month.<sup>v</sup>

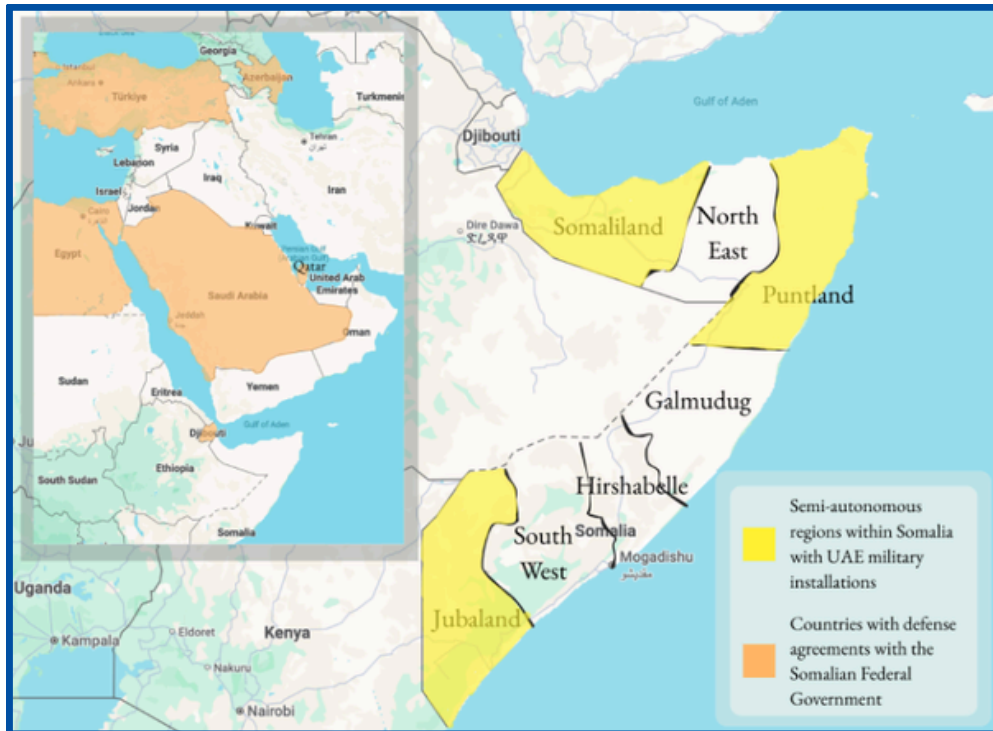
- The FGS signed a defense cooperation agreement with Qatar on 19 January 2026, with Qatar pledging military training, information sharing, and broader security cooperation, according to a source with second-hand access with background Somali international affairs.<sup>vi</sup>
- Saudi Arabia signed a military cooperation MoU with the FGS on 9 February 2026, which the FGS Ministry of Defense stated aims to strengthen defense and military cooperation frameworks to serve strategic interests of both countries, according to a source with secondhand access with a background in Red Sea regional affairs.<sup>vii</sup>

*We assess with moderate confidence that the semi-autonomous Puntland, Jubaland, and Somaliland regional administrations will further challenge the FGS' sovereignty over security functions in the next 3-6 months.* Puntland and Jubaland administrations suspended formal ties with the FGS in 2024 over concerns with FGS-proposed governance and electoral reforms reducing regional political autonomy.<sup>viii</sup> For its part, Somaliland declared independence in May 1991.<sup>ix</sup> The FGS's rupture with the UAE will likely push Somaliland, Puntland, and Jubaland further from Mogadishu and closer to the UAE. Somaliland's government has accepted sizable UAE financial support for Somaliland's energy and infrastructure development, including \$442 million to modernize Berbera Port and \$7.8 million to construct a seven-megawatt solar plant in 2021.<sup>x</sup>

- Jubaland's administration continues to host a UAE-operated and constructed military outpost supporting counterterrorism operations in the Jubaland federal member state, according to a source with third hand access and a background in Gulf-focused defense and intelligence.<sup>xi</sup>
- Puntland's administration continues to host UAE special forces personnel near Bosaso Airport who support the Puntland Maritime Police Force with training and salary payment, according to a source with third hand access and a background in African security.<sup>xii</sup>
- Somaliland's administration stated that its agreements with the UAE remain "lawful and binding" despite FGS cancellation of bilateral ties with the UAE, according to a source with firsthand access and knowledge of Somaliland foreign affairs.<sup>xiii</sup>



# Africa: Political and Economic



*Map showing Somali semi-autonomous regions with UAE military installations and countries that hold defense agreements with the FGS.<sup>27</sup>*

## Source Summary Statement

We have moderate confidence in the sourcing and evidentiary basis that informs this analysis. Multiple Somali, regional, and western news sources, think tank pieces, and government statements comprise the evidentiary basis for each assessment. Sources include a range of pro and anti-Somali FGS perspectives with direct, secondary, and tertiary access to key entities and decision makers. Automated translation of source information written in the Somali and Arabic languages to the English language adds potential translation error and diminished cultural and linguistic nuance.



# Africa: Political and Economic

---

## Notes

- <sup>i</sup> Somaliland Standard | <https://somalilandstandard.com/qatar-somalia-agree-to-deepen-military-cooperation/> | Qatar, Somalia agree to deepen military cooperation | 16 June 2025 | N/A | News Article
- <sup>ii</sup> Faisal Ali | <https://www.aljazeera.com/news/2026/1/12/somalia-cancels-all-agreements-with-uae-over-alleged-sovereignty-violations> | Somalia cancels all agreements with UAE over alleged sovereignty violations | 12 January 2026 |
- <sup>iii</sup> Faisal Ali | <https://www.aljazeera.com/news/2026/1/12/somalia-cancels-all-agreements-with-uae-over-alleged-sovereignty-violations> | Somalia cancels all agreements with UAE over alleged sovereignty violations | 12 January 2026
- <sup>iv</sup> Baidoa Online | <https://x.com/BaidoaOnline/status/2012632536699056536> | Alert | 17 January 2026 |
- <sup>v</sup> Garowe Online | <https://www.garoweonline.com/en/news/somalia/craft-news-in-somali-saudi-arabia-in-talks-with-egypt-somalia-on-military-coalition> | Saudi Arabia in Talks with Egypt, Somalia on Military Coalition | 16 January 2026 |
- <sup>vi</sup> Hiraan Online | [https://www.hiraan.com/news4/2026/Jan/204224/somalia\\_qatar\\_sign\\_defense\\_cooperation\\_deal\\_after\\_break\\_with\\_h\\_uae.aspx](https://www.hiraan.com/news4/2026/Jan/204224/somalia_qatar_sign_defense_cooperation_deal_after_break_with_h_uae.aspx) | 20 January 2026 | Somalia, Qatar sign defense cooperation deal after break with UAE |
- <sup>vii</sup> Al Jazeera Staff | <https://www.aljazeera.com/news/2026/2/10/somalia-saudi-arabia-sign-agreement-on-military-cooperation> | Somalia, Saudi Arabia sign agreement on military cooperation | 10 February 2026 |
- <sup>viii</sup> Omar Mahmood | <https://www.crisisgroup.org/alr/africa/somalia-somaliland-saudi-arabia-uae/gulf-tensions-spill-somalia-mogadishu-severs-uae-ties> | Gulf Tensions Spill into Somalia as Mogadishu Snubs UAE | | Reliable expert analysis on geopolitical competition in the Horn of Africa region | 16 January 2026 |
- <sup>ix</sup> Wedaeli Chibelushi, Ameyu Etana, and Farah Lamane | <https://www.bbc.com/news/articles/c14v4kmg275o> | Why Israel's recognition of Somaliland as an independent state is controversial | 30 December 2025
- <sup>x</sup> Jack Dutton | <https://www.al-monitor.com/originals/2026/02/unfazed-saudi-pressure-uae-unveils-solar-investment-somaliland> | Unfazed by Saudi pressure, UAE unveils solar investment in Somaliland | 18 February 2026 |
- <sup>xi</sup> Eleonora Ardemagni | <https://carnegieendowment.org/sada/2024/04/flexible-outposts-the-emirati-approach-to-military-bases-abroad?> | Flexible Outposts: The Emirati Approach to Military Bases Abroad | 30 April 2024 |
- <sup>xii</sup> International Institute for Strategic Studies | <https://www.iiss.org/publications/strategic-comments/2024/12/the-uae-as-a-security-partner-in-africa/> | The UAE as a security partner in Africa | December 2024 | Credible listing of all the UAE's growing securitization efforts throughout Africa
- <sup>xiii</sup> MFA Somaliland | <https://x.com/somalilandmfa/status/2010794338750775344> | The Government of the Republic of Somaliland categorically rejects Somalia's false claims over Berbera | 12 January 2026
- <sup>xiv</sup> Canva | <https://canva.link/3kcnko83tilb7wt> | Canva design (shared project link) | 29 March 2026 | N/A | User-generated graphic design.
- <sup>xv</sup> Google | <https://www.google.com/maps/@14.8077269,47.2718763,4.79z> | Google Maps (Map view of specified coordinates) | 29 March 2026 | N/A | Web-based map service.



## Islamic State – Sahel Province Consolidation Likely to Intensify Conflict with Jama'at Nusrat al-Islam wal-Muslimin

Author: Maddie Garber, Giselle Caycho, Kemba Barnes, Kyle Smith  
Division Chief: Elena Steinmuller & Team Lead: Maddie Garber  
Editor: Joe Garbowski

---

*We assess with high confidence that the Islamic State – Sahel Province (ISSP) will consolidate its power across the Sahel through expansion of its territorial reach, which will increase its direct conflict with Jama'at Nusrat al-Islam wal-Muslimin (JNIM).* Before 2022 ISSP conducted operations in the remote areas and borders of Niger, Mali, and Burkina Faso.<sup>i</sup> ISSP primarily targeted areas with limited governance, operating out of the Tillabéri region in Niger, but has since expanded its territorial ambitions by conducting targeted assassinations and systematic massacres across the Sahel.<sup>ii</sup>

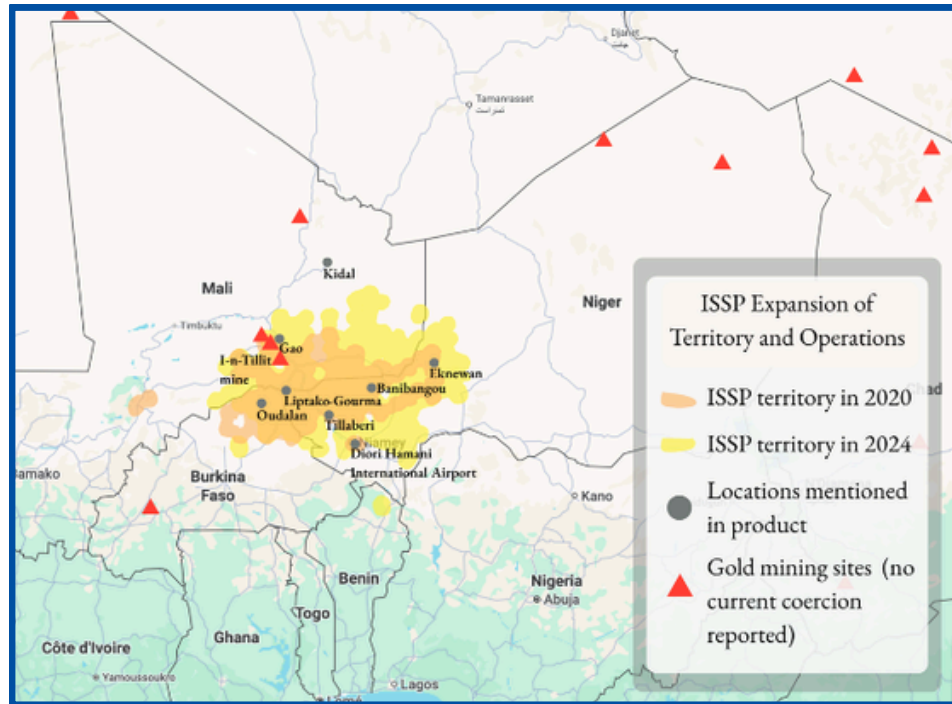
- ISSP has maintained a stronghold in the Liptako-Gourma tri-state border area while using eastern Burkina Faso provinces as an operational base to expand its reach into the Benin-Niger-Nigeria border area. In February 2025, ISSP began launching offensives against JNIM positions in Burkina Faso, highlighting the group's capacity and intent to actively contest territory at JNIM's expense, according to multiple sources with secondhand access and track records of reliable reporting.<sup>iii</sup>
- From June through November 2025, ISSP and JNIM engaged in their most intense series of clashes since 2022 within Burkina Faso, JNIM's operational stronghold. Multiple credible sources found that ISSP and JNIM engaged in conflict against each other more in November 2025 than all of 2024.<sup>iv</sup>
- In 2025, ISSP conducted attacks in Eknewan and Banibangou in Western Niger, killing 34 soldiers. In 2026, it conducted an attack on the Diori Hamani International Airport in Niger, according to a body of reliable sources with secondhand access and track records of reliable reporting.<sup>v</sup>

*We assess with high confidence that ISSP will generate increasing revenue through extortion, which will support its expanding territorial reach at JNIM's expenses.* This revenue will likely enhance ISSP's ability to sustain prolonged military campaigns and finance territorial expansion. ISSP will very likely replace opportunistic revenue with more sustainable sources of income like extortion of civilians and the taxation of the gold mining industry.<sup>vi</sup>

- ISSP generates close to \$6 million a year, with much of this revenue derived from cattle rustling, kidnapping for ransom, and human trafficking. ISSP also receives funding and operational support from the Islamic State – West Africa Province through the General Directorate of Provinces Al-Furqan office, according to multiple credible sources with secondhand access.<sup>vii</sup>
- ISSP's centralization under Abu al-Bara al-Sahrawi has led to organized coercive taxation against the civilian population in the Gao and Kidal regions of Mali. Imposed taxes have become more formalized and regulated through "designated" tax collectors, according to sources with secondhand access and reliable track records of reporting who analyzed primary source jihadist media.<sup>viii</sup>
- ISSP is exploring ways to extort gold mines in Mali, Niger, Burkina Faso, and Chad, according to multiple credible sources. A United Nations assessment reported that ISSP was on site at the I-n-Tillit-Nord mine in Mali.<sup>ix</sup>



# Africa: Transnational Threats



Map depicting ISSP expansion of territorial operations, attacks, and interest in gold mine sites for future taxation impositions.<sup>x</sup>

## Source Summary Statement

We assess with high confidence the body of sourcing provides reliable information and strengthens the key judgements in the analysis. The evidence in this assessment concerning ISSP attacks, taxation efforts, and location dispersion derives from multiple credible news reports and sources with second-hand access and minimal bias. Our analysis of ISSP operations and expansion into JNIM territory comes from credible reporting; however, we have not confirmed exact casualty information. Our analysis of ISSP coercive taxation of the local population across Mali comes from reliable reporting but there is no current evidence that ISSP profits from taxing gold mines, only that they have been allegedly on or near official mining sites in Mali. Our intelligence gaps are as follows: casualties from ISSP and JNIM disputes, financial data from ISSP's formalized taxation structure, and ISSP's profit from taxing gold mines in the Sahel.



# Africa: Transnational Threats

---

## Notes

<sup>i</sup> Wassim Nasr | [https://www.hoover.org/research/new-dynamics-sahel-region#\\_ftn2](https://www.hoover.org/research/new-dynamics-sahel-region#_ftn2) | The New Dynamics In The Sahel Region | 6 June 2023 ; EURAFRICA | <https://eurafrika.info/2025/11/03/newly-restructured-the-islamic-state-in-> | Newly restructured, the Islamic State in the Sahel aims for regional expansion | 3 November 2025

<sup>ii</sup> Ibid. ; Frederick Appiah Afriyie | <https://casssafrica.org/wp-content/uploads/2025/11/CASSS-Research-Policy-Papers3.pdf> | Unmasking the Rivalry: The Battle for Dominance Between ISGS and JNIM in the Sahel | October 2024

<sup>iii</sup> Ladd Sewart et al. | <https://acleddata.com/update/africa-overview-march-2026> | Africa Overview: March 2026 | 9 March 2026 ; Héni Nsaibia | <https://acleddata.com/report/new-frontlines-jihadist-expansion-reshaping-benin-niger-and-nigeria-borderlands> | New frontlines: Jihadist expansion is reshaping the Benin, Niger, and Nigeria borderlands | 27 March 2025 ; Kars de Bruijne & Clara Gehrling | <https://www.clingendael.org/sites/default/files/2025-12/Trouble%20at%20the%20border.pdf> | Trouble at the border: a Nigerian extremist group has also entered Benin | October 2025

<sup>iv</sup> Charles, Miles and Karr, Liam | CRITICAL THREATS | [https://www.criticalthreats.org/analysis/salafi-jihadi-areas-of-operation-in-west-africa-interactive-map-and-campaign-analysis#\\_edn040cda08beaf5bf480a65c4564d3d66479](https://www.criticalthreats.org/analysis/salafi-jihadi-areas-of-operation-in-west-africa-interactive-map-and-campaign-analysis#_edn040cda08beaf5bf480a65c4564d3d66479) | Salafi- Jihadi Areas of Operation in West Africa Interactive Map and Campaign Analysis | 24 November 2025 ; African Security Analysis | <https://www.africansecurityanalysis.org/updates/jnim-multi-axis-offensive-and-consolidation-of-rural-dominance> | JNIM Multi-Axis Offensive and Consolidation of Rural Dominance | 29 March 2026 ; JANES | [https://customerportal.janes.com/entity/organisation/3rsz5brcz9JjCxVgB0IBwN/fragment/lunar-text-fragment\\_h14MsdRJBpOOwme3NvI\\_0](https://customerportal.janes.com/entity/organisation/3rsz5brcz9JjCxVgB0IBwN/fragment/lunar-text-fragment_h14MsdRJBpOOwme3NvI_0) | Jamaat Nusrat al-Islam wal-Muslimin: Operational Profile | 18 September 2025

<sup>v</sup> Security Council Report | <https://www.securitycouncilreport.org/monthly-forecast/2025-08/un-office-for-west-africa-and-the-sahel-unowas.php> | Monthly Forecast: West Africa and the Sahel | 30 July 2025 ; Jeune Afrique | <https://www.jeuneafrique.com/1692131/politique/au-niger-une-attaque-revendiquee-par-letat-islamique-fait-plusieurs-morts-au-sein-de-larmee/> | Au Niger, une attaque revendiquée par l'État islamique fait plusieurs morts au sein de l'armée | 27 May 2025 ; Human Rights Watch | <https://www.hrw.org/world-report/2025/country-chapters/niger> | Niger: Events of 2024 | 2025 ; Héni Nsaibia | <https://acleddata.com/report/new-frontlines-jihadist-expansion-reshaping-benin-niger-and-nigeria-borderlands> | New frontlines: Jihadist expansion is reshaping the Benin, Niger, and Nigeria borderlands | 27 March 2025

<sup>vi</sup> National Counterterrorism Center | [https://www.dni.gov/nctc/terrorist\\_groups/isis\\_sahel.html](https://www.dni.gov/nctc/terrorist_groups/isis_sahel.html) | ISIS-SAHEL | September 2024

<sup>vii</sup> Rousselle, Adam | <https://gnet-research.org/2025/02/18/combating-islamic-state-finance-west-africa-and-the-sahel/> | Combating Islamic State Finance: West Africa and the Sahel | 2026 ; United States Department of Treasury | <https://home.treasury.gov/system/files/136/Fact-Sheet-Countering-ISIS-Financing-2-27-24.pdf> | 2024 ; Lucas Webber | <https://thesoufancenter.org/intelbrief-2025-october-1/#:~:text=Despite%20having%20much%20less%20insurgent,its%20traditional%20and%20emerging%20strongholds> | Does the Sahel Pose a Transnational Terror Threat? | 1 October 2025 ; Adam Rousselle | <https://gnet-research.org/2025/02/18/combating-islamic-state-finance-west-africa-and-the-sahel/> | Combating Islamic State Finance: West Africa and the Sahel | 18 February 2025 ; Vincent Foucher | [https://unidir.org/wp-content/uploads/2024/09/UNIDIR\\_Boko-Haram\\_Mapping\\_an\\_Evolving\\_Armed\\_Constellation.pdf](https://unidir.org/wp-content/uploads/2024/09/UNIDIR_Boko-Haram_Mapping_an_Evolving_Armed_Constellation.pdf) | Boko Haram: Mapping an Evolving Armed Constellation | September 2024



# Africa: Transnational Threats

---

## Notes

<sup>viii</sup> Liam Karr and Brian Carter | <https://www.criticalthreats.org/analysis/salafi-jihadi-areas-of-operation-in-the-sahel> | Salafi-Jihadi Areas of Operation in the Sahel | 20 November 2024 ; Lina Rafaat | <https://mei.edu/publication/schism-jihadism-sahel-how-al-qaeda-and-islamic-state-are-battling-legitimacy-sahelian/> | The Schism of Jihadism in the Sahel: How Al-Qaeda and the Islamic State are Battling for Legitimacy in the Sahelian Context | 13 October 2021 ; Luca Raineri et al. | <https://doi.org/10.1093/afraf/adaf026> | Comparing Jihadist Governance in the Sahelian Branches of the Islamic State | 6 December 2025 | pp. 287–312

<sup>ix</sup> UNODC Regional Office for West and Central Africa (ROSEN) | [https://www.unodc.org/documents/data-and-analysis/tocta\\_sahel/TOCTA\\_Sahel\\_Gold\\_v5.pdf](https://www.unodc.org/documents/data-and-analysis/tocta_sahel/TOCTA_Sahel_Gold_v5.pdf) | Gold Trafficking in the Sahel | 2023 ; United Nations Security Council | <https://digitallibrary.un.org/record/3876820?v=pdf#files> | Final report of the Panel of Experts Established pursuant to Security Council resolution 2374 (2017) on Mali and renewed pursuant to resolution 2484 (2019) | 13 August 2020 ; Neil Munshi | <https://www.ft.com/content/8ff4c2ca-7ac3-4f3b-96ba-6fb74bbb60d5> | Instability in the Sahel: how a jihadi gold rush is fuelling violence in Africa | 27 June 2021 ; Luca Raineri | <https://doi.org/10.1080/03932729.2020.1833475> | Gold Mining in the Sahara-Sahel: The Political Geography of State-making and Unmaking | 2 November 2020

<sup>x</sup> Canva | <https://canva.link/28hjefyf7l01pcx> | Canva design (shared project link) | 1 April 2026 | N/A | User-generated graphic design. ; United Nations | [https://www.unodc.org/unodc/en/data-and-analysis/Tocta\\_Sahel\\_maps.html](https://www.unodc.org/unodc/en/data-and-analysis/Tocta_Sahel_maps.html) | Gold Mining Areas and Presence of Armed Groups | 2023 ; Héni Nsaibia | <https://acleddata.com/report/newly-restructured-islamic-state-sahel-aims-regional-expansion> | Newly restructured, the Islamic State in the Sahel aims for regional expansion | 30 September 2024



## Africa: Transnational Threats

---

### **Criminal Organization Black Axe Likely to Intensify Recruitment and Financial Aspirations Amid International Law Enforcement Pressures**

Author: Giselle Caycho, Kemba Barnes, Maddie Garber, Kyle Smith  
Division Chief: Elena Steinmuller & Team Lead: Maddie Garber  
Editor: Joe Garbowski

---

**We assess with moderate confidence that Black Axe will increase recruitment at the collegiate level across Africa and Europe within the next year to expand its cybercrime and money laundering network and offset losses.** The Black Axe was founded in 1977 as a pan-African student confraternity in the University of Benin, Nigeria, and subsequently expanded into surrounding universities across the country. The group has maintained an active presence on university campuses, using this access to identify and recruit technologically capable members into its cybercrime network.<sup>i</sup> As international law enforcement increasingly targets Black Axe members, the group will likely need university recruitment to sustain its membership and operational capacity. The Black Axe's continued access to universities provides a source of technologically capable recruits needed to expand its cybercrime operations.

- The Black Axe's primary recruits are male university students from Edo State, with a confirmed presence at 16 universities in Nigeria alone. The Black Axe specifically targets university students and young professionals, with many of its recruiters operating within the IT industry to identify and approach potential recruits, according to a body of second-hand sources.<sup>ii</sup>
- Black Axe targets debt-ridden teenagers and students across Europe, recruiting them as "money mules" to move illicit funds through their personal bank accounts, according to credible international news reports.<sup>iii</sup>

**We assess with high confidence that the Black Axe enterprise is expanding its complex transnational fraud and cybercrime activities, increasing its financial capacity and resilience against law enforcement.**

INTERPOL classifies the Black Axe as one of the most prominent criminal organizations responsible for cyber-enabled financial fraud, including identity fraud, property loss, and stolen personal data. In the wake of international scrutiny, the Black Axe criminal enterprise has likely expanded its network of operating cells by using its illicit financial funds to coordinate networks across West Africa and into Europe and North America.

- In 2024, INTERPOL conducted Operation Jackal III, an operation that targeted several West African criminal groups. It resulted in the freezing of over 720 bank accounts and the arrest of 300 people, including many associated with the Black Axe syndicate, according to sources with reliable track records of reporting.<sup>iv</sup>
- The Black Axe utilizes sophisticated cybercrime operations like business email compromises (BECs), which enables the group to generate an estimated \$300-500 million annually in North America alone, according to multiple sources with reliable track records of reporting and secondhand access.<sup>v</sup>

**We assess with moderate confidence that the Black Axe is seeking to expand its transnational capabilities through drug and human trafficking networks, expanding the threat the group poses beyond the cyber domain to more traditional illicit crimes.** Nigerian crime syndicates engage in criminal activities like drug distribution and human trafficking on a global scale.<sup>vi</sup> While the Black Axe has been successful through its illicit cyber activities, it will likely diversify its revenue, paralleling adaptations undertaken by other Nigerian crime syndicates to sustain its activity as law enforcement targets the organization abroad.

- Black Axe criminal enterprise has engaged in mid-level drug dealing within Nigeria, which is a global transit hub for drug trafficking. The local Black Axe networks in Nigeria are amongst the primary distributors of cocaine locally, according to sources with secondhand access.<sup>vii</sup>
- Black Axe affiliates have been investigated by authorities in Palermo, Italy for running local prostitution rings and exploiting trafficked young women and girls from Nigeria, according to a reliable source first-hand access.<sup>viii</sup>



# Africa: Transnational Threats

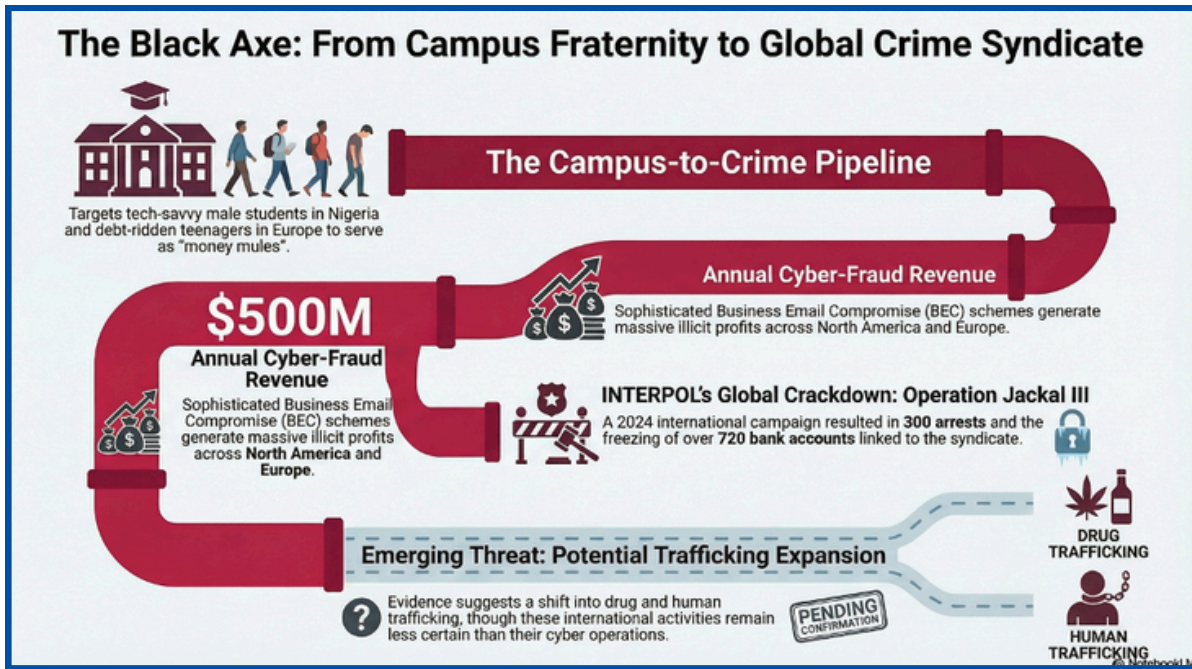


Figure denoting the recruitment and revenue expansion efforts of the Nigerian Black Axe crime syndicate beyond West Africa and into Europe and North America.<sup>ix</sup>

## Source Summary Statement

We assess with high confidence that the sourcing and body of reporting is credible and supports our assessments. The evidence in this assessment about international law enforcement action against the Black Axe and subsequent Black Axe recruitment strategies and cybercrime activities comes from reliable sources with a track record of credible reporting. Though the sources detailing Black Axe illicit drug trafficking and human trafficking are reliable, confirmation from other reports and news sources remains limited. Our intelligence gaps are as follows: the reach of the Black Axe recruitment abroad and the Black Axe's level of involvement in drug and human trafficking networks internationally.



# Africa: Transnational Threats

## Notes

<sup>i</sup> Lime, M. L. | Africa Center for Strategic Studies | <https://africacenter.org/spotlight/black-axe-nigeria-transnational-organized-crime/> | Black Axe—Nigeria’s most notorious transnational criminal organization | 29 October 2024 ; Northcott, Charlie | BBC | <https://www.bbc.com/news/articles/c984w8jr1glo> | World’s police in technological arms race with Nigerian mafia | 27 August 2024

<sup>ii</sup> Lime, M. L. | Africa Center for Strategic Studies | <https://africacenter.org/spotlight/black-axe-nigeria-transnational-organized-crime/> | Black Axe—Nigeria’s most notorious transnational criminal organization | 29 October 2024 ; Africa Eye | BBC News | <https://www.bbc.com/news/world-africa-59614595> | The ultra-violent cult that became a Global Mafia | 12 December 2021 ; Button, M., Lazarus, S., Hock, B., et al. | <https://doi.org/10.1007/s12117-025-09576-2> | Nigerian confraternities and mass cross-border fraud | 1 November 2025 ; Ryan Prosser | <https://metro.co.uk/2025/07/21/british-teens-recruited-worlds-feared-mafia-black-axe-gang-23714430/> | British teens recruited to world’s most feared mafia – the Black Axe gang | 21 July 2025 ; CrowdStrike Global Intelligence Team | <https://www.crowdstrike.com/wp-content/uploads/2020/03/NigerianReport.pdf> | INTELLIGENCE REPORT: NIGERIAN CONFRATERNITIES EMERGE AS BUSINESS EMAIL COMPROMISE THREAT | 20 March 2018

<sup>iii</sup> Ryan Prosser | <https://metro.co.uk/2025/07/21/british-teens-recruited-worlds-feared-mafia-black-axe-gang-23714430/> | British teens recruited to world’s most feared mafia – the Black Axe gang | 21 July 2025 ; EUROPOL | <https://www.europol.europa.eu/media-press/newsroom/news/34-arrests-in-spain-during-action-against-black-axe-criminal-organisation> | 34 arrests in Spain during action against the 'Black Axe' criminal organisation | 9 January 2026 ; Lally, C. | <https://www.irishtimes.com/crime-law/2025/07/14/black-axe-fraud-gang-uses-snapchat-to-recruit-irish-money-mules/> | Black Axe fraud gang uses Snapchat to recruit Irish money mules | 14 July 2025

<sup>iv</sup> Mark Button et al. | <https://link.springer.com/article/10.1007/s12117-025-09576-2> | Nigerian confraternities and mass cross-border fraud | 1 November 2025 ; Monika Ponczuk | <https://apnews.com/article/interpol-financial-crime-west-africa-nigeria-dce992bc9edba0130f4766ab7d76261e> | Interpol arrests 300 people in a global crackdown on West African crime groups across 5 continents | 17 July 2024

<sup>v</sup> Suleman Lazarus | <https://doi.org/10.1080/01639625.2024.2352049> | Cybercriminal Networks and Operational Dynamics of Business Email Compromise (BEC) Scammers: Insights from the “Black Axe” Confraternity | 14 May 2024 ; INTERPOL | <https://www.interpol.int/en/News-and-Events/News/2024/INTERPOL-operation-strikes-major-blow-against-West-African-financial-crime> | INTERPOL operation strikes major blow against West African financial crime | 16 July 2024 ; U.S. Attorney's Office, District of New Jersey | <https://www.justice.gov/usao-nj/pr/prominent-leader-black-axe-extradited-united-states-conspiring-engage-internet-scams-and> | Prominent Leader Of Black Axe Extradited To United States For Conspiring To Engage In Internet Scams And Money Laundering | 16 December 2024 ; Matthew La Lime | <https://africacenter.org/spotlight/black-axe-nigeria-transnational-organized-crime/> | Black Axe—Nigeria’s Most Notorious Transnational Criminal Organization | 29 October 2024

<sup>vi</sup> Claire Healy, Tejal Jesrani, Theodore Leggett, Johannes Socher and Julie Viollaz | [https://www.unodc.org/conig/uploads/documents/NOCTA\\_Web\\_Version\\_25.09.2023.pdf](https://www.unodc.org/conig/uploads/documents/NOCTA_Web_Version_25.09.2023.pdf) | Organized Crime in Nigeria: A Threat Assessment | 25 September 2023 ; EUROPOL | <https://www.europol.europa.eu/media-press/newsroom/news/15-arrested-in-intercontinental-crackdown-against-nigerian-crime-syndicates> | 15 arrested in intercontinental crackdown against Nigerian crime syndicate | 2025

<sup>vii</sup> UNDOC | [https://www.unodc.org/documents/data-and-analysis/cocaine/Global\\_cocaine\\_report\\_2023.pdf](https://www.unodc.org/documents/data-and-analysis/cocaine/Global_cocaine_report_2023.pdf) | Global Report on Cocaine 2023 | March 2023 ; Pius Adeleye | <https://www.theafricareport.com/312261/how-nigeria-has-become-key-transit-hub-for-global-cocaine-trafficking/> | How Nigeria has become key transit hub for global cocaine trafficking | 16 June 2023

<sup>viii</sup> Krista Mahr | <https://www.wbaa.org/2018-05-16/italian-cops-try-to-stop-a-sex-trafficking-gang-called-black-axe> | Italian Cops Try To Stop A Sex Trafficking Gang Called Black Axe | 16 May 2018

<sup>ix</sup> Google | <https://notebooklm.google.com> | NotebookLM | 6 April 2026 | AI-powered research and note-taking tool.



# **East Asia Pacific Division**



### Beijing Likely to Increase Complexity of Gray Zone Operations Around Taiwan

Author: Matthew Parada, Ke-Hsi Lu

Division Chief: Evan Miller & Team Lead: Nitara Gunawardhene

Editor: Marlee Warwick

Graphic Designer: Matthew Parada

---

*We assess with high confidence that China's naval gray zone operations around Taiwan will increase in frequency and complexity over the next 6 months because Beijing is rehearsing tactics to stymie U.S. or Japanese interventions, pushing Taiwan and its partners toward a more unpredictable and high-risk threat environment.* China is almost certainly rehearsing tactics intended to complicate or deter U.S. or Japanese intervention in a potential invasion of Taiwan. Its grey zone operations include the large-scale coordination of the civilian maritime sector and increasing Chinese Coast Guard (CCG) presence around Taiwan's outlying possessions.

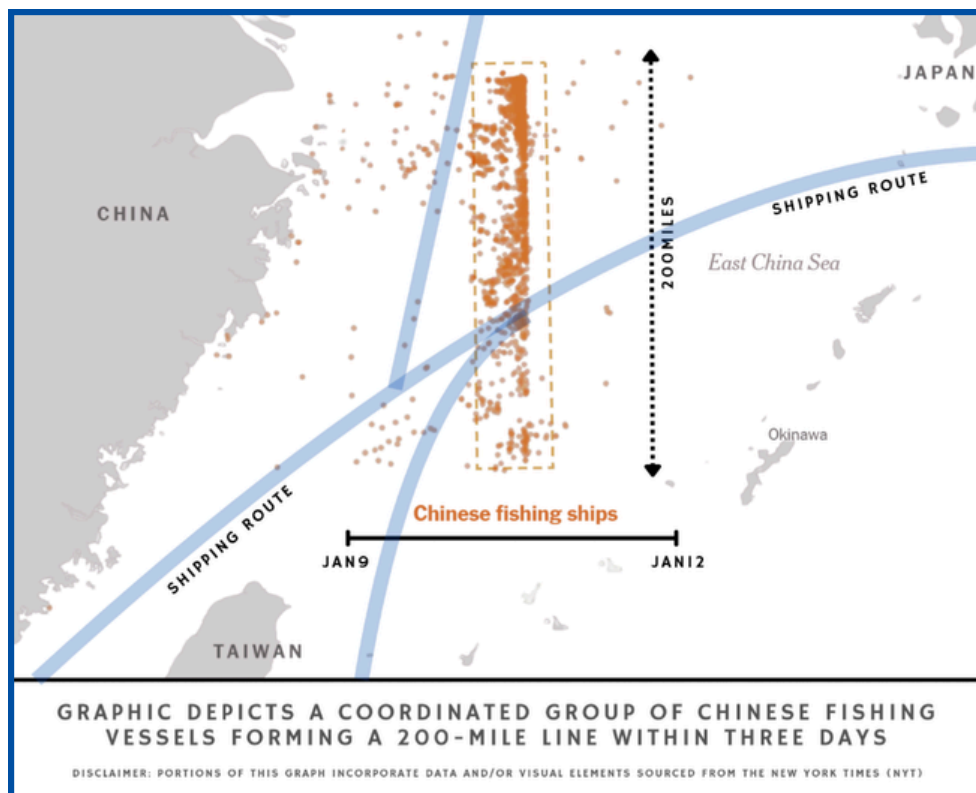
- Chinese civilian fishing vessels massed in unprecedented numbers twice in the East China Sea in December 2025 and January 2026, according to a credible source with second-hand access.<sup>i</sup> In just three days of coordination, they formed a precise line over 200 miles long, overlapping international military and commercial shipping routes, according to two sources with second-hand access and established reporting records.<sup>ii</sup>
- In February 2026, the CCG increased its presence around Taiwan's Kinmen island. Incursions into prohibited and restricted waters rose from 21 cases in the same period last year to 32 this year, under the guise of law-enforcement operations, according to credible sources with second-hand access and reliable tracking records of reporting.<sup>iii</sup>

*We assess with moderate confidence that the People's Liberation Army's (PLA) Airforce gray zone operations around Taiwan will decrease in frequency but increase in complexity over the next six months, signaling a shift toward more deliberate and targeted activity.* Taiwan and its partners are highly likely to face a more unpredictable threat environment requiring heightened readiness for high-risk incidents. China has shifted from frequent airspace incursions to fewer but increasingly dangerous maneuvers, likely reflecting a deliberate escalation in intent evident in recent high-risk military drills.<sup>iv</sup>

- Since December 2025, Chinese military aircraft have been carrying out unusually dangerous maneuvers near Taiwanese fighter aircraft, including firing flares near Taiwanese aircraft, trailing them in firing positions, and utilizing "piggyback" tactics that use one aircraft to mask another's radar signature and conceal the presence of fighter jets, according to a reliable and credible source with second-hand access.<sup>v</sup>
- PLA air incursions into Taiwan's Air Defense Identification Zone have declined, with the daily average falling to a record low of 5.4 from a previous average of 8 per day, while infiltration by Chinese fighter aircraft, which peaked around July 2025, has since tapered off, according to a second-hand source with a credible reporting record.<sup>vi</sup>



# East Asia Pacific: Military and Cyber



*Graphic Depiction of Coordinate Chinese Fishing Vessels<sup>viii</sup>*

## Source Summary Statement

We assess with high confidence that the sources collected are reliable, credible, and substantively support the judgments presented in this analysis. Although the majority have second-hand access, they offer valuable insight into developments in the Taiwan Strait, such as the Financial Times and their reporting on escalatory moves made by Chinese fighter jets. Intelligence gaps in this product include the number of fishing vessels involved in forming a 200-mile line and the details of the specific line of command involved in massing fish vessels. Collectively, these sources provide detailed information on both civilian and military activities, adding depth and contextual rigor to the assessment.



# East Asia Pacific: Military and Cyber

---

## Notes

<sup>i</sup> New York Times | <https://www.nytimes.com/interactive/2026/01/16/world/asia/china-ships-fishing-militia-blockade.html> | Thousands of Chinese Fishing Boats Quietly Form Vast Sea Barriers | 16 January 2026

<sup>ii</sup> Nikkei Asia | <https://asia.nikkei.com/politics/international-relations/japan-china-tensions/formations-of-thousands-of-chinese-fishing-boats-stir-worries-in-japan> | Formations of thousands of Chinese fishing boats stir worries in Japan | 19 February 2026

<sup>iii</sup> Common Wealth Magazine | <https://www.cw.com.tw/graphics/china-uses-gray-zone-tactics-against-taiwan-kinmen/> | Live from Kinmen Gray Area Routine Incursion by the Coast Guard | 18 March 2025 ; Liberty Times | <https://news.ltn.com.tw/news/politics/breakingnews/5339505> | The Chinese coast guard ship broke into Kinmen waters again, and the coast guard vessel forcefully drove away | 10 February 2026 ; Central News Agency | <https://www.cna.com.tw/news/acn/202602130239.aspx> | Chinese coast guard ship invaded Kinmen, and the Coast Guard called for an end to such actions | 13 February 2026 ; United Daily News | <https://udn.com/news/story/10930/9286134> | For the first time this year! Fujian Coast Guard went to inspect the waters of Kinmen and warned me that the patrol boat was "dangerously approaching" | 24 January 2026 ; Taiwan Security Monitor | <https://tsm.schar.gmu.edu/trackers/china-coast-guard-incident-tracker/> | Chinese Coast Guard Incident Tracker | 2026

<sup>iv</sup> NPR | <https://www.npr.org/2025/12/29/g-s1-103877/chinese-military-drills-around-taiwan> | Chinese military stages drills around Taiwan to warn 'external forces' | 29 December 2026

<sup>v</sup> Financial Times | <https://www.ft.com/content/66a59c7c-5a22-482c-9363-71cb016ceb01> | China steps up dangerous air encounters near Taiwan | 9 February 2026

<sup>vi</sup> Bloomberg | <https://www.bloomberg.com/news/articles/2026-02-09/china-sends-fewer-flights-near-taiwan-in-sign-of-training-shift?embedded-checkout=true> | China Sends Fewer Fighter Jets Near Taiwan in Sign of Training Shift | 9 February 2026

<sup>vii</sup> New York Times | <https://www.nytimes.com/interactive/2026/01/16/world/asia/china-ships-fishing-militia-blockade.html> | Thousands of Chinese Fishing Boats Quietly Form Vast Sea Barriers | 16 January 2026 ; Nikkei Asia | <https://asia.nikkei.com/politics/international-relations/japan-china-tensions/formations-of-thousands-of-chinese-fishing-boats-stir-worries-in-japan> | Formations of thousands of Chinese fishing boats stir worries in Japan | 19 February 2026



### China Likely to Bolster Drone Industry Resilience an Effort to Avoid U.S. Restrictions Through 2030

Authors: Ke-Hsi Lu, Matthew Parada  
Division Chief: Evan Miller & Team Lead: Nitara Gunawardhene  
Editor: Marlee Warwick  
Graphic Designer: Matthew Parada

---

*We assess with moderate confidence that Beijing is integrating emerging civil drone companies into military supply chains in an effort to mitigate risks from U.S. trade restrictions and ensure a stable expansion of drone production over the next two to three years.* By securing its control over drone production, China is positioning itself to shape the drone industry’s long-term development, very likely viewing expansion of its supplier base as critical to long-term resilience. This strategy reduces Beijing’s reliance on major drone manufacturers such as Da-Jiang Innovations (DJI)—a Chinese firm currently under U.S. sanctions that commands around 70 percent of the global market—by diversifying its industrial base with smaller, specialized suppliers.

- In 2024, Chinese authorities prioritized more than 1,000 key "Little Giant" enterprises to foster new growth momentum, according to a primary Chinese government source and an independent media report.<sup>i</sup> By December 2024, the number of "Little Giant" enterprises had exceeded 14,600, with more than 5,000 operating in emerging technology sectors such as AI and the drone and low-altitude aviation industries, according to the same sources.
- As civilian and military technologies increasingly converge, there is a risk that other countries will unintentionally support China’s military modernization, according to a nonpartisan policy team with second-hand access and a record of reliable reporting.<sup>ii</sup>
- Three-quarters of analyzed entities in People’s Liberation Army (PLA) AI procurement (Jan 2023–Dec 2024) were nontraditional suppliers, illustrating the incorporation of emerging unmanned aerial vehicle (UAV) firms beyond existing state-owned enterprises into the military ecosystem, according to a nonpartisan policy team with second-hand access and a record of reliable reporting.<sup>iii</sup>
- Drone company Sichuan Tengden’s diverse investment sources illustrate how local state-owned capital, university-linked strategic capital, and private venture capital can converge to push an emerging drone company onto a state-prioritized "Little Giant" or champion track, according to two reliable sources.<sup>iv</sup>

*We assess with high confidence that through early 2027, DJI will intensify efforts to appear compliant with U.S. regulations in an effort to make it harder for the U.S. to justify sanctions against a key enabler of China’s civil-military integration (CMI).* Through 2026, DJI will likely reinforce regulatory legitimacy in Western markets as a survival strategy before the January 2027 federal ban on software updates takes effect.<sup>v</sup>

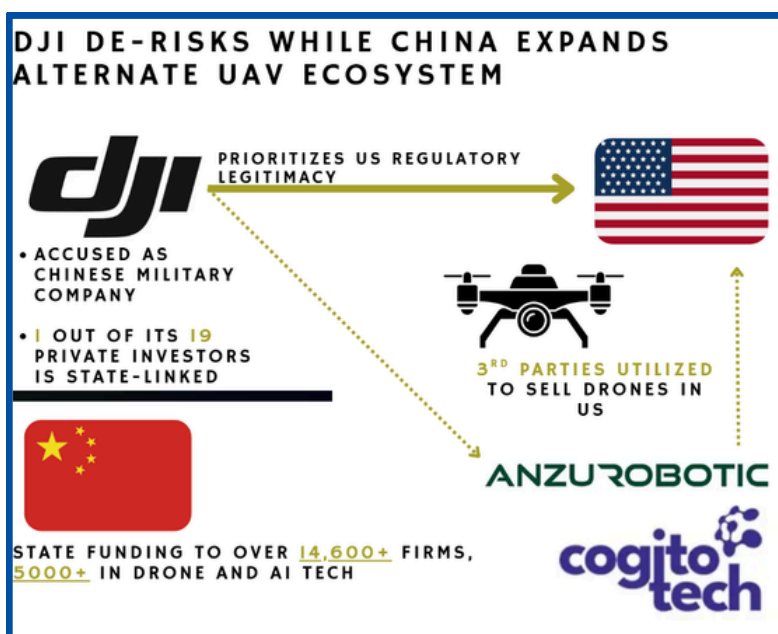
- DJI is publicizing its lawsuits and promoting third-party security audits to signal compliance ahead of new product launches and reinforce regulatory legitimacy, according to a reliable source with secondhand access.<sup>vi</sup>
- DJI is contesting its "Chinese Military Company" (1260H) designation in the U.S. through an ongoing legal challenge, according to DJI’s first-hand corporate legal announcement and related court filings.<sup>vii</sup>
- DJI has repeatedly urged the U.S. government to initiate the congressionally mandated security review ahead of the late 2025 deadline, and to either expedite the process or extend the deadline, according to DJI’s official website.<sup>viii</sup>



## East Asia Pacific: Military and Cyber

*We further assess with moderate confidence that after 22 December 2025, DJI-linked sales into restricted markets will occur through indirect and less observable channels in an attempt to bypass U.S. restrictions.* Rebranded DJI drones that avoid U.S. restrictions provide an alternative entry point into the market, remaining cheaper than domestic alternatives and leveraging buyers' reliance on low-cost Chinese drone products. The difference in cost creates a continuous demand for rebranded drones, allowing high-risk items to stay in the U.S. market while hindering the growth of domestic drone manufacturers.

- Drones from Anzu Robotics and Cogito Tech Company were rebranded DJI drones but did not disclose their relationship with DJI, according to U.S. House committee letters to Anzu Robotics.<sup>ix</sup>
- Drones sold on Amazon also closely resemble DJI models, according to several reliable media sources specialized in drone technology.<sup>x</sup>
- With higher compliance costs in buying U.S.-made drones, some departments grew concerned about future operations after the ban on new drone models, according to a credible media source and a government report.<sup>xi</sup>



*This graphic shows that while DJI tries to reduce regulatory risk in the U.S. market, China is also expanding alternative UAV channels.<sup>xii</sup>*

### Source Summary Statement

This analytic product draws on a mixed evidentiary base that includes first-hand corporate and legal materials (DJI public announcements and related court filings), second-hand commercial investor data (PitchBook), primary Chinese government policy statements, and secondary OSINT-informed assessments from a nonpartisan policy team with a documented empirical reporting record. The quantity of source material is sufficient to support the core judgments on DJI's short-term public de-risking behavior and Beijing's broader pattern of cultivating alternative UAV firms, and the source set includes both official and independent reporting channels. However, the quality and inferential strength of the evidence vary across judgments, particularly where reporting depends on company self-disclosure, media reporting on suspected passthrough channels, and open-source indicators that may not capture indirect or concealed forms of coordination. Key intelligence gaps include limited visibility into DJI's internal decision-making and non-public commercial relationships, the extent of informal or non-equity state influence, the operational significance of emerging UAV firms' financing ties for future PLA procurement integration, and whether restricted technology transfer may continue through opaque intermediaries. Overall, we assess the evidentiary basis for this analytic product as moderate confidence: sufficient for directional judgments and early warning framing, but insufficient to resolve hidden channels, intent, or causal attribution with high confidence across all claims.



# East Asia Pacific: Military and Cyber

---

## Notes

<sup>i</sup> The State Council of the People's Republic of China | [https://english.www.gov.cn/news/202406/19/content\\_WS6672c84ac6d0868f4e8e8531.html](https://english.www.gov.cn/news/202406/19/content_WS6672c84ac6d0868f4e8e8531.html) | China to step up support for 'little giant' firms | 19 June 2024 | N/A | Highly reliable primary source from official government portal, publicly accessible via official English website ; South China Morning Post | <https://www.scmp.com/economy/china-economy/article/3288996/chinas-strategic-little-giant-firms-quickly-rise-14600-surpass-2025-goal> | China's strategic 'little giant' firms quickly rise to 14,600, surpass 2025 goal | 2 December 2024 | N/A | Reliable regional news outlet; secondary source offering independent economic analysis; publicly accessible via website

<sup>ii</sup> Center for Security and Emerging Technology | <https://cset.georgetown.edu/wp-content/uploads/CSET-Pulling-Back-the-Curtain-on-Chinas-Military-Civil-Fusion.pdf> | Pulling Back the Curtain on China's Military-Civil Fusion | 01 September 2025 | p. 33 | Independent US academic analysis; high reliability; publicly accessible

<sup>iii</sup> Center for Security and Emerging Technology | <https://cset.georgetown.edu/wp-content/uploads/CSET-Pulling-Back-the-Curtain-on-Chinas-Military-Civil-Fusion.pdf> | Pulling Back the Curtain on China's Military-Civil Fusion | 01 September 2025 | p. 20 | Independent US academic analysis; high reliability; publicly accessible

<sup>iv</sup> PitchBook | <https://my.pitchbook.com/profile/593836-03/company/profile#investors> | Sichuan Tengden Tech: Company Profile - Investors | 04 April 2026 | N/A | Established third-party business database; high reliability; requires subscription; independent financial oversight; Center for Security and Emerging Technology | <https://cset.georgetown.edu/wp-content/uploads/CSET-Pulling-Back-the-Curtain-on-Chinas-Military-Civil-Fusion.pdf> | Pulling Back the Curtain on China's Military-Civil Fusion | 01 September 2025 | p. 23 | Independent US academic analysis; high reliability; publicly accessible

<sup>v</sup> Haye Kesteloo | <https://dronexl.co/2026/01/22/fcc-drone-firmware-updates-january-2027/> | FCC Confirms Drone Firmware Updates Will Continue Until January 2027 | 22 January 2026 | Reliable drone industry news site tracking FCC policy updates and regulatory compliance

<sup>vi</sup> Sally French | <https://www.thedronegirl.com/2026/02/26/dji-sues-fcc/> | DJI Sues FCC Over Regulatory Restrictions | 26 March 2026 | Reliable and publicly accessible independent media outlet providing expert analysis on drone regulations and industry trends

<sup>vii</sup> DJI Media Center | <https://www.dji.com/media-center/announcements/dji-appeals-us-court-decision> | DJI Appeals U.S. Court Decision Upholding the Department of Defense's "Chinese Military Company" Designation | 14 October 2025 | Official legal announcement; highly accessible; represents DJI's subjective legal defense and corporate advocacy

<sup>viii</sup> DJI ViewPoints Team | <https://viewpoints.dji.com/blog/whats-going-on-with-dji-in-the-u.s> | What's Going On with DJI in the U.S.? | 20 November 2025 | Corporate viewpoint; primary source; publicly accessible; explicitly reflects DJI's advocacy against US legislative pressure

<sup>ix</sup> Select Committee on the Chinese Communist Party | <https://chinaselectcommittee.house.gov/sites/evo-subsites/selectcommitteeontheccp.house.gov/files/evo-media-document/2024-08-20%20anzu%20letter.pdf> | Letter to Anzu Robotics | 20 August 2024 | pp. 1-7 | Official letter from the House of Representative; high reliability; asking for clarifications of relationship with DJI; publicly accessible ; Select Committee on the Chinese Communist Party | <https://chinaselectcommittee.house.gov/sites/evo-subsites/selectcommitteeontheccp.house.gov/files/evo-media-document/2024-08-20-%20DOC%20Anzu%20%2B%20Cogito%20Letter.pdf> | Letter to Secretary of the Department of Commerce Gina Raimondo | 20 August 2024 | pp. 1-6 | Official letter from the House of Representative; high reliability; publicly accessible; requesting viewpoint confirmation from the Department of Commerce



# East Asia Pacific: Military and Cyber

## Notes

<sup>x</sup> Haye Kesteloo | <https://dronexl.co/2025/10/09/skyany-x1-dji-mini-4-pro-clone-drone-amazon/> | SKYANY X1 EMERGES AS LATEST DJI MINI 4 PRO CLONE ON AMAZON AHEAD OF DECEMBER BAN | 9 October 2025 | Third-party viewpoint; high reliability; publicly accessible; long-term observation of the shell company ; Haye Kesteloo | <https://dronexl.co/2024/04/02/specta-air-drone-alternative-dji-air-3/> | SPECTA AIR DRONE: A COMPELLING ALTERNATIVE TO DJI'S AIR 3 | 2 April 2024 | Third-party viewpoint; high reliability; publicly accessible; comparison of similar products from DJI and Specta Air ; Shawn Air Photography | <https://dronexl.co/2025/07/25/skyrover-x1-exposed-dji-shocking-disguise/> | SKYROVER X1 EXPOSED: DJI'S SHOCKING DISGUISE TO BEAT US BANS? | 25 July 2025 | Third-party viewpoint; high reliability; publicly accessible; comparison of similarities between the products

<sup>xi</sup> Didi Tang | <https://www.ap.org/news-highlights/spotlights/2024/many-americans-have-come-to-rely-on-chinese-made-drones-now-lawmakers-want-to-ban-them/> | Many Americans have come to rely on Chinese-made drones. Now lawmakers want to ban them | 23 December 2024 | second-handed sources from heavy DJI users; local government feedbacks and reactions to the ban; explicitly stating the difficulty of overcoming the ban in a short time; high credibility; publicly accessible ; The U.S. Government Accountability Office | <https://www.gao.gov/products/gao-24-106924> | Federal Lands: Effects of Interior's Policies on Foreign-Made Drones | 25 September 2024 | Official report on how prohibition may undermine the departmental operations; high credibility; publicly accessible

<sup>xii</sup> The State Council of the People's Republic of China | [https://english.www.gov.cn/news/202406/19/content\\_WS6672c84ac6d0868f4e8e8531.html](https://english.www.gov.cn/news/202406/19/content_WS6672c84ac6d0868f4e8e8531.html) | China to step up support for 'little giant' firms | 19 June 2024 | Highly reliable primary source from official government portal, publicly accessible via official English website ; South China Morning Post | <https://www.scmp.com/economy/china-economy/article/3288996/chinas-strategic-little-giant-firms-quickly-rise-14600-surpass-2025-goal> | China's strategic 'little giant' firms quickly rise to 14,600, surpass 2025 goal | 2 December 2024 | N/A | Reliable regional news outlet; secondary source offering independent economic analysis; publicly accessible via website ; PitchBook | <https://my.pitchbook.com/profile/66264-67/company/profile#executives> | SZ DJI Technology Company: Company Profile - Executives | 31 March 2026 | Established third-party business database; high reliability; requires subscription; independent financial oversight ; Select Committee on the Chinese Communist Party | <https://chinaselectcommittee.house.gov/sites/evo-subsites/selectcommitteeontheccp.house.gov/files/evo-media-document/2024-08-20%20anzu%20letter.pdf> | Letter to Anzu Robotics | 20 August 2024 | pp. 1-7 | Official letter from the House of Representative; high reliability; asking for clarifications of relationship with DJI; publicly accessible ; Select Committee on the Chinese Communist Party | <https://chinaselectcommittee.house.gov/sites/evo-subsites/selectcommitteeontheccp.house.gov/files/evo-media-document/2024-08-20%20-%20DOC%20Anzu%20%2B%20Cogito%20Letter.pdf> | Letter to Secretary of the Department of Commerce Gina Raimondo | 20 August 2024 | pp. 1-6 | Official letter from the House of Representative; high reliability; publicly accessible; requesting viewpoint confirmation from the Department of Commerce ; Center for Security and Emerging Technology | <https://cset.georgetown.edu/wp-content/uploads/CSET-Pulling-Back-the-Curtain-on-Chinas-Military-Civil-Fusion.pdf> | Pulling Back the Curtain on China's Military-Civil Fusion | 01 September 2025 | p. 20 | Independent US academic analysis; high reliability; publicly accessible



### China's Rare Earth Tactics Likely to Increase Japan's Vulnerability

Author: Taekyung Hwang, Ren Sandretto-Chang  
Division Chief: Evan Miller & Team Lead: Taekyung Hwang  
Editor: Marlee Warwick  
Graphic Designer: Matthew Parada

---

*We assess with moderate confidence that China's export restrictions will cause Japanese defense companies and car manufacturers to face supply-side pressure before July 2026, giving China leverage over Japan's greater economy and relationship with the U.S.* Japanese car manufacturers will continue to pay heavy premiums for rare earth magnets due to Japan-specific Chinese export controls and higher world prices. Despite the Japanese government's effort to stockpile rare earths, Japanese industries that rely on rare earths are likely still vulnerable to supply shocks.

- Japan cannot access a commercially viable rare earth magnet supply chain which does not rely on China for refining and magnet production, and Japanese projects currently underway to develop a supply chain without China will not be completed before July 2026, according to two secondary sources with reliable track records.<sup>i</sup>
- The global price of neodymium, a key input into over 95% of rare earth magnets, has doubled since July 2025, according to a reliable economic data tracking conglomerate and two industry sources.<sup>ii</sup> China has significantly decreased its exports of heavy rare earth metals, also used in magnet manufacturing, resulting in higher global prices, according to two Chinese government sources and a reliable media source.<sup>iii</sup>
- China has explicitly targeted Japan's automobile and defense industries in multiple rounds of rare earth export controls, according to two Chinese government sources and a reliable journalistic source.<sup>iv</sup> The Japanese automobile sector employs 8.3% of Japan's workforce, according to an official U.S. government source.<sup>v</sup>
- Japan currently has 6-12 months' worth of rare earth stockpiles, according to a third-hand journalistic source.<sup>vi</sup> However, Suzuki, the second largest automaker in Japan, faced production disruptions during China's first round of rare earth export controls in June 2025, according to a reliable media source.<sup>vii</sup>

*We assess with moderate confidence that China will further tighten rare earth export controls on Japan, increasing political friction and accelerating Japanese efforts to reduce supply chain dependence on China before July 2026.*

China has already shown it is willing to single out Japan by trying export controls to national security and military end use, likely in response to Tokyo's recent Taiwan-related remarks, which Beijing saw as aggressive posturing.<sup>viii</sup> Japan's move from caution in November 2025 to public opposition in January 2026 suggests further political friction between the two is likely.<sup>ix</sup> Simultaneously, Japan is treating China's rare earth export restrictions as a supply chain vulnerability and is almost certainly responding by expanding efforts to secure rare earths from outside China.<sup>x</sup>

- The current China-Japan rift has drawn comparisons to the 2012 dispute over the East China Sea islands, which halted leader-level meetings for about 2.5 years, while China's throttling of rare earth exports to Japan in 2010 provided a precedent for using export restrictions as leverage against Japan, according to a secondary source with a highly reliable track record.<sup>xi</sup>
- China's rare earth magnet exports to Japan fell 8% month-on-month in December 2025 to 280 metric tons, from 305 tons in November 2025, suggesting that export restrictions were already having a measurable impact on shipments to Japan, according to a credible and reliable secondary source that often reports official customs data.<sup>xii</sup>
- Japan is strengthening supply-chain resilience by expanding non-China rare earth sourcing from Australia's Lynas, according to a body of secondary sources with reliable track records.<sup>xiii</sup>



## East Asia Pacific: Political and Economic

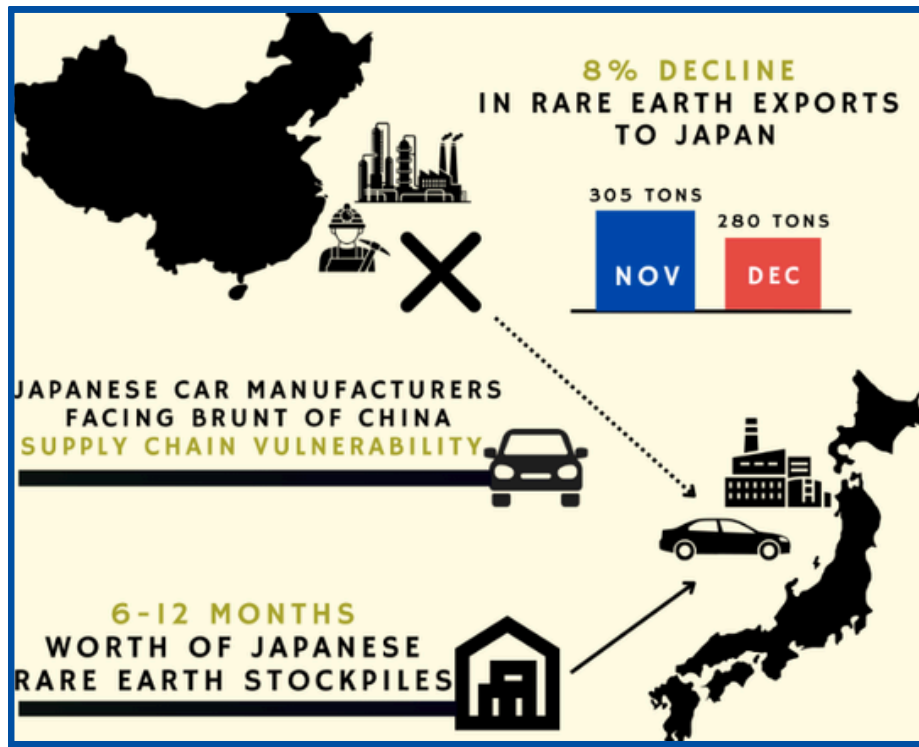


Figure showing declining Chinese rare earth exports to Japan and Japan's estimated rare earth stockpiles.<sup>xiv</sup>

### Source Summary Statement

This analysis is based on official government statements, industry sources, and secondary sources with reliable track records. The source base strongly supports our judgments on increasing near-term supply-side pressure for rare earths and rising political friction between China and Japan. However, there are some intelligence gaps, especially regarding private rare earth stockpile levels and procurement arrangements of Japanese carmakers. Chinese and Japanese government statements may reflect strategic messaging rather than fully revealing each country's position on policy issues. Some Japanese government sources regarding rare earth reserves indicate target reserve levels, not real-time inventory. Overall, the evidentiary base only allows for a moderate confidence assessment.



# East Asia Pacific: Political and Economic

## Notes

<sup>i</sup> International Energy Agency | <https://www.iea.org/commentaries/with-new-export-controls-on-critical-minerals-supply-concentration-risks-become-reality> | With new export controls on critical minerals, supply concentration risks become reality | 23 October 2025 | Expert commentary on critical mineral supply risks ; Gracelin Baskaran and Meredith Schwartz | <https://www.csis.org/analysis/chinas-rare-earth-campaign-against-japan> | 13 January 2026 | China's Rare Earth Campaign Against Japan | Expert analysis of China's rare earth export controls

<sup>ii</sup> Trading Economics | <https://tradingeconomics.com/commodity/neodymium> | Neodymium Rare Earth | n.d. ; Okon Recycling | <https://www.okonrecycling.com/magnet-recycling-and-applications/sustainability-and-magnets/recycling-process-samarium-cobalt-magnets/> | From Alloy to Element: The 3 Recycling Processes for Samarium-Cobalt Magnets | 04 November 2025 | Article by a major U.S. rare earth magnet recycling company ; TOPMAG | [https://www.topmag.in/rare-earth-magnets-guide-2026/#elementor-toc\\_heading-anchor-16](https://www.topmag.in/rare-earth-magnets-guide-2026/#elementor-toc_heading-anchor-16) | A Comprehensive Guide to Rare Earth Magnets | 4 February 2026 | Article by a major Chinese rare earth magnet production and sales company

<sup>iii</sup> Kip Keen and Liubov Georges | <https://www.spglobal.com/energy/en/news-research/latest-news/metals/012726-rare-earth-supply-bottlenecks-set-to-persist-in-2026> | Rare earth supply bottlenecks set to persist in 2026 | 27 January 2026 | Reliable analysis and reporting from two experienced commodity journalists

<sup>iv</sup> Ministry of Commerce of the People's Republic of China | [https://www.mofcom.gov.cn/zwgk/zcfb/art/2025/art\\_9c2108ccaf754f22a34abab2fedaa944.html](https://www.mofcom.gov.cn/zwgk/zcfb/art/2025/art_9c2108ccaf754f22a34abab2fedaa944.html) | Announcement No. 18 of 2025 | 4 April 2025 | Chinese government source, potentially biased or misleading ; Ministry of Commerce of the People's Republic of China | [https://www.mofcom.gov.cn/zwgk/zcfb/art/2026/art\\_8990fedae8fa462eb02cc9bae5034e91.html](https://www.mofcom.gov.cn/zwgk/zcfb/art/2026/art_8990fedae8fa462eb02cc9bae5034e91.html) | Announcement No. 18 of 2025 | 6 January 2026 | Chinese government source, potentially biased or misleading ; Francis Tang | <https://www.japantimes.co.jp/business/2026/02/24/economy/china-japan-companies-watch-list/> | China issues dual-use blacklist of 20 Japanese entities | 24 February 2026

<sup>v</sup> International Trade Administration | <https://www.trade.gov/country-commercial-guides/japan-automotive> | Japan Country Commercial Guide | 20 November 2025

<sup>vi</sup> Shotaro Tani and Yuichi Shiga | <https://asia.nikkei.com/business/technology/tech-asia/inside-japan-s-long-battle-to-de-chinafy-its-rare-earth-supply-chain> | Inside Japan's long battle to 'de-Chinafy' its rare earth supply chain | 28 January 2026

<sup>vii</sup> Reuters | <https://www.reuters.com/markets/commodities/suzuki-motor-halted-swift-car-production-due-chinas-rare-earth-curb-nikkei-says-2025-06-05> | Suzuki Motor halted Swift production due to China's rare earth curbs, sources say | 5 June 2026

<sup>viii</sup> Ministry of Commerce of the People's Republic of China | [https://www.mofcom.gov.cn/zwgk/zcfb/art/2026/art\\_8990fedae8fa462eb02cc9bae5034e91.html](https://www.mofcom.gov.cn/zwgk/zcfb/art/2026/art_8990fedae8fa462eb02cc9bae5034e91.html) | Ministry of Commerce Announcement No. 1 of 2026: Announcement on Strengthening Export Controls on Dual-Use Items to Japan | 6 January 2026 | Chinese Ministry of Commerce announcement ; Ministry of Commerce of the People's Republic of China | [https://english.mofcom.gov.cn/News/SpokesmansRemarks/art/2026/art\\_ad432d69b63545ef81b6b0c9d21c0fa1.html](https://english.mofcom.gov.cn/News/SpokesmansRemarks/art/2026/art_ad432d69b63545ef81b6b0c9d21c0fa1.html) | MOFCOM Spokesperson's Remarks on Tightening Controls on Dual-Use Items Exports to Japan | 9 January 2026 | Chinese Ministry of Commerce spokesperson's remarks, possibly politically motivated ; Reuters | <https://www.reuters.com/world/asia-pacific/china-bans-exports-dual-use-items-military-purposes-japan-2026-01-06/> | China bans dual-use goods exports for Japan military over Taiwan remarks | 6 January 2026 | Reliable journalistic reporting

<sup>ix</sup> Reuters | <https://www.reuters.com/world/asia-pacific/japan-trade-minister-says-no-particular-change-china-rare-earth-export-controls-2025-11-18/> | Japan trade minister says no particular change in China rare earth export controls | 18 November 2025 | Reliable journalistic reporting ; Ministry of Economy, Trade and Industry | [https://www.meti.go.jp/english/speeches/press\\_conferences/2026/0203001.html](https://www.meti.go.jp/english/speeches/press_conferences/2026/0203001.html) | Press Conference by Minister Akazawa (Excerpt) | 3 February 2026 | Translated excerpt from a press release by the Japanese Minister of Economy, Trade and Industry



# East Asia Pacific: Political and Economic

---

## Notes

<sup>x</sup> Ministry of Economy, Trade and Industry | [https://www.meti.go.jp/english/speeches/press\\_conferences/2026/0203001.html](https://www.meti.go.jp/english/speeches/press_conferences/2026/0203001.html) | Press Conference by Minister Akazawa (Excerpt) | 3 February 2026 | Translated excerpt from a press release by the Japanese Minister of Economy, Trade and Industry

<sup>xi</sup> Satoshi Sugiyama and Kantaro Komiya | <https://www.reuters.com/world/asia-pacific/japan-says-chinas-dual-use-export-ban-unacceptable-rare-earths-crosshairs-2026-01-07> | Japan condemns China's dual-use export ban as rare earth curbs loom | 7 January 2026 | Reliable journalistic reporting

<sup>xii</sup> Reuters | <https://www.reuters.com/world/asia-pacific/chinese-exports-rare-earth-magnets-japan-fall-month-december-continued-decline-2026-01-20/> | Chinese exports of rare earth magnets to Japan fall in December | 20 January 2026 | Reliable journalistic reporting

<sup>xiii</sup> Sojitz | <https://www.sojitz.com/en/news/article/topics-20251030.html> | Sojitz Begins Import of Heavy Rare Earths from Australia | 30 October 2025 | Press release from a diversified Japanese trading company ; Yuka Obayashi | <https://www.reuters.com/world/asia-pacific/japans-sojitz-expand-australian-rare-earth-imports-partner-broadens-product-2026-02-16/> | Japan's Sojitz to expand Australian rare earth imports as partner broadens product lineup | 16 February 2026 | Reliable journalistic reporting

<sup>xiv</sup> Satoshi Sugiyama and Kantaro Komiya | <https://www.reuters.com/world/asia-pacific/japan-says-chinas-dual-use-export-ban-unacceptable-rare-earths-crosshairs-2026-01-07> | Japan condemns China's dual-use export ban as rare earth curbs loom | 7 January 2026 | Reliable journalistic reporting ; Reuters | <https://www.reuters.com/world/asia-pacific/chinese-exports-rare-earth-magnets-japan-fall-month-december-continued-decline-2026-01-20/> | Chinese exports of rare earth magnets to Japan fall in December | 20 January 2026 | Reliable journalistic reporting



## Chinese Criminal Organizations Likely to Change Modus Operandi to Secure Fentanyl Trade

Author: Stephanie Bulega-Nasuna

Division Chief: Evan Miller & Team Lead: Kyla Jamieson

Editor: Marlee Warwick

Graphic Designer: Matthew Parada

---

*We assess Chinese criminal organizations are highly likely to adopt new strategies in the next 2-3 months to avoid increased Mexican law enforcement disruptions to established fentanyl trafficking routes.* In 2018, President Xi Jinping classified fentanyl as a high-risk drug and required strict regulations to the manufacturing and distribution of fentanyl. Chinese chemical companies pivoted from exporting most of the finished fentanyl directly to the United States to supplying precursor chemicals to Latin American cartels based near the U.S.-Mexico border. Approximately 1,500 small China-based chemical firms sustain this trade by rapidly rebranding and reopening under new names to evade enforcement and keep trafficking rates high.<sup>i</sup> Historically, increased pressure on drug trafficking operations causes them to slow down and change their modus operandi to continue avoiding law enforcement.<sup>ii</sup>

- When pressured in 2024, Chinese chemical companies disguised precursor drugs as legal goods, falsified customs labels, used front companies, and routed shipments through third countries to reach the U.S., according to a variety of first and second-hand sources with a history of reliable reporting on China.<sup>iii</sup>
- In 2025, U.S. authorities indicted Hubei Amarvel Biotech Ltd, a Chinese chemical company for selling fentanyl pre-cursor chemicals. Hubei Amarvel Biotech Ltd generated \$900,000 in digital funds by re-emerging under a new company name each they were shut down by law enforcement, according to a credible source with firsthand access.<sup>iv</sup>

*We assess that Chinese criminal organizations are likely to limit operations for the next 1-3 months in order to restructure their networks in cooperation with Latin American cartel partners, but a lack of coordinated law enforcement action in affected countries will make any reduction of fentanyl exports to the United States temporary.* Latin American cartels and Chinese criminal organizations maintain a complex, symbiotic relationship that has demonstrated resilience against law enforcement crackdowns.<sup>v</sup> Chinese criminal organizations have built a transnational network linking chemical suppliers in China with Mexican cartels, enabling the mass production of fentanyl in Mexico. Their use of family-based laundering systems makes the flow of illicit profits faster, cheaper, and harder to detect than traditional financial channels.<sup>vi</sup>

- In 2023, U.S. authorities indicted three Chinese-based companies involved in fentanyl trafficking were indicted for knowingly distributing fentanyl precursor chemicals through custom fraud to the United States and Mexico, according to a source with firsthand access and a history of reliable reporting on the issue.<sup>vii</sup>
- Between 2024-2025, 25 Chinese nationals were charged with drug trafficking and money laundering charges on behalf of the Sinaloa and Jalisco New Generation Cartels, according to a source with a history of reliable reporting.<sup>viii</sup>
- Following the 2023 joint U.S.-China announcement on curbing fentanyl trafficking, three high-profile Chinese drug traffickers dismissed the warnings as non-threatening and suspended operations for just six weeks, according to a reliable source with firsthand access.<sup>ix</sup>



## East Asia Pacific: Transnational Threats

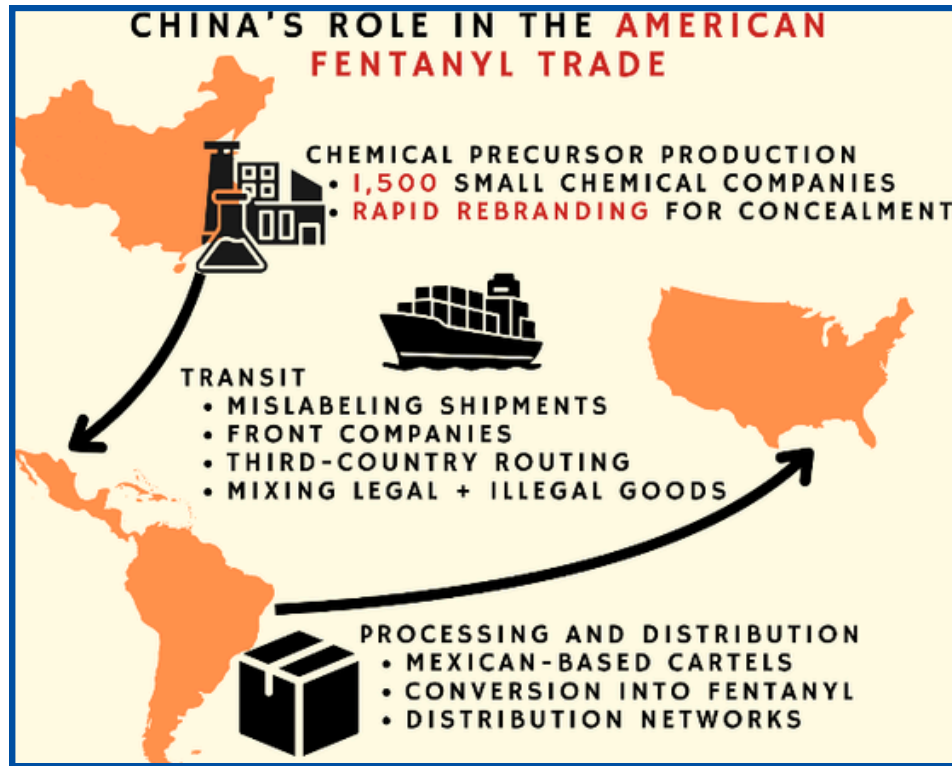


Figure showing China's role in the American fentanyl trade, including seizures and cooperation statements between the U.S. and China.<sup>x</sup>

### Source Summary Statement

We assess with high confidence that this body of reporting is credible, reliable, and supports the judgments within this analysis. Several government sources such as the Drug Enforcement Agency (DEA), U.S. Department of Justice (DOJ), and Immigration and Customs Enforcement's (ICE) may reflect U.S. policy priorities, but are corroborated by nonpartisan sources including the Congressional Research Service and Council of Foreign Relations as well as independent reporting from the British Broadcasting Corporation and Washington Post, reducing the risk of single-source bias. The body of reporting draws on sources with a reliable track record of covering U.S.-China fentanyl trafficking, with access that is predominantly firsthand through the DEA, DOJ, and ICE's direct involvement in enforcement actions. However, notable gaps remain: the reporting is heavily U.S.-centric with limited insight into Chinese domestic enforcement effectiveness or the internal decision-making of Chinese criminal organizations, meaning key judgments rely on observed behavior rather than direct sourcing. This analysis also lacks firsthand Latin American sourcing, and think tank sources from the Heritage Foundation and Foundation for Defense of Democracies carry ideological biases that limits their credibility on questions of international cooperation.



# East Asia Pacific: Transnational Threats

---

## Notes

<sup>i</sup> Cadell Cate and Lily Kuo Washington Post | <https://www.washingtonpost.com/world/2024/06/20/china-fentanyl-mexico-us/Despite-Fentanyl-Crackdown,-Chinese-Sellers-Are-Open-for-Business/> | 20 June 2024 | The Washington Post is an American known for its in-depth coverage of U.S. politics and government, but was recently came under ownership of Jeff Bezos.

<sup>ii</sup> Vanda Felbab-Brown and Fred Dews | Brookings Institute | <https://www.brookings.edu/articles/the-fentanyl-pipeline-and-chinas-role-in-the-us-opioid-crisis/> | The fentanyl pipeline and China's role in the US opioid crisis | 1 October 2024 | The Brookings Institution is an American nonpartisan think tank founded that conducts in-depth, independent research to provide policy recommendations.

<sup>iii</sup> Martínez-Fernández Andrés | The Heritage Foundation | <https://www.heritage.org/china/report/holding-china-and-mexico-accountable-americas-fentanyl-crisis> | Holding China and Mexico Accountable for America's Fentanyl Crisis | 9 September 2024 ; Birenbaum, Josh | Foundation for the Defense of Democracies | <https://www.fdd.org/analysis/2025/10/18/the-case-for-a-second-front-in-the-war-on-fentanyl/> | The Case for a Second Front in the War on Fentanyl | 18 October 2025 ; Drug Enforcement Administration | [https://www.dea.gov/sites/default/files/2024-05/NDTA\\_2024.pdf](https://www.dea.gov/sites/default/files/2024-05/NDTA_2024.pdf) | National Drug Threat Assessment 2024 (NDTA) | May 2024 ; Devlin, Kayleen, and Yi Ma | BBC | <https://www.bbc.com/news/articles/cvg93nn1e6go> | How Does Fentanyl Get into the US? | 1 August 2025.

<sup>iv</sup> U.S. Department of Justice Department | <https://www.justice.gov/usao-sdny/pr/two-chinese-chemical-company-executives-convicted-and-multiple-websites-and-0> | Two Chinese Chemical Company Executives Convicted and Multiple Websites and Cryptocurrency Accounts Seized in Connection with Fentanyl Precursor Importation and Money Laundering Schemes | 3 February 2025.

<sup>v</sup> Nathaniel Parish Flannery and Vanda Felbab-Brown | Brookings | <https://www.brookings.edu/articles/how-is-china-involved-in-organized-crime-in-mexico/> | How is China involved in organized crime in Mexico? | 23 February 2022 ; Celina B. Realuyo | U.S. Congress | <https://www.congress.gov/118/meeting/house/115542/witnesses/HHRG-118-BA10-Wstate-RealuyoP-20230323.pdf> | Written Statement of Celina B. Realuyo on China and the Mexican Cartels' Asymmetrical War through the Illicit Fentanyl Trade at a Hearing on Follow the Money: The CCP's Business Model Fueling the Fentanyl Crisis before the Subcommittee on National Security, Illicit Finance, and International Financial Institutions of the Committee on Financial Services of the U.S. House of Representatives | 23 March 2024.

<sup>vi</sup> Sabina Nicholls | Dialogo Americas | <https://dialogo-americas.com/articles/chinas-expanding-footprint-in-latin-america-hidden-strengths-and-emerging-risks-part-ii/> | Dialogo Americas China's Expanding Footprint in Latin America: Hidden Strengths and Emerging Risks — PART II | 17 December 2025 | Dialogo is a U.S. Southern Command-produced digital publication directed at partner nation military and defense leaders in the SOUTHCOM area of operation.

<sup>vii</sup> U.S. Department of Justice | <https://www.justice.gov/usao-edny/pr/three-chinese-chemical-manufacturing-companies-and-five-employees-charged-conspiring> | Three Chinese Chemical Manufacturing Companies and Five Employees Charged with Conspiring to Manufacture Fentanyl | 23 June 2023.

<sup>viii</sup> Rosen Liana | Congressional Research Service (CRS) | <https://www.congress.gov/crs-product/R48786> | Chinese Money Laundering Networks | 8 January 2026.

<sup>ix</sup> Cadell Cate and Lily Kuo Washington Post | <https://www.washingtonpost.com/world/2024/06/20/china-fentanyl-mexico-us/> | Despite Fentanyl Crackdown, Chinese Sellers Are Open for Business | 20 June 2024 | The Washington Post is an American known for its in-depth coverage of U.S. politics and government, but was recently came under ownership of Jeff Bezos.

<sup>x</sup> Devlin, Kayleen, and Yi Ma | BBC | <https://www.bbc.com/news/articles/cvg93nn1e6go> | How Does Fentanyl Get into the US? | 1 August 2025.



## Methamphetamine and Opium Trafficking Likely to Increase from Myanmar

Author: Adrienne Sanza

Division Chief: Evan Miller & Team Lead: Kyla Jamieson

Editor: Marlee Warwick

Graphic Designer: Matthew Parada

---

***We assess with high confidence that drug production and trafficking of methamphetamine and opium in Myanmar will increase in the next 3-6 months, which will lead to an increase of illegal drugs in the region, including key U.S. allies.*** As a result of the ongoing civil war, armed resistance forces and ethnic armies control 42% of Myanmar, allowing drug production to thrive and be a source of income for rebel factions.<sup>i</sup> Much of Myanmar's opium cultivation occurs in the Shan and Kachin states which, despite shifting territorial control, experience less armed conflict compared to other states and thus likely provide a stable environment for drug production to flourish.<sup>ii</sup> As drug production increases in Myanmar, distribution to Australia, the Philippines, New Zealand, South Korea, Japan, and other nations in the region, is likely to increase, undermining anti-drug trafficking efforts and fueling the addiction crisis and drug-related crime in those nations.<sup>iii</sup>

- In the 2024/2025 growing season, Myanmar's poppy cultivation territory increased by 17%, and Myanmar is now the world's top source of illegal opium, according to a source with first-hand access and an established reporting record.<sup>iv</sup>
- As of December 2025, drug traffickers in Myanmar have doubled the price they will pay for a kilogram of raw opium from farmers, according to a source with first- and second-hand access and an established reporting record.<sup>v</sup> Opium poppy farming has returned to popularity as conflict creates challenges for farmers to transport goods to market.
- Myanmar's government claimed its largest-ever seizure of drug production sites and illicit drugs between 8 and 12 January, seizing drugs and equipment at three different drug manufacturing facilities, according to a source with second-hand access and a reliable reporting record.<sup>vi</sup>

***We assess that maritime trafficking routes in Southeast Asia will likely become more active in the next 3-6 months because of increased scrutiny on land borders in the Golden Triangle, making anti-trafficking efforts more challenging for local and international authorities.*** Most methamphetamine trafficked into Indonesia, Malaysia, and the Philippines come from Myanmar's Shan State via maritime routes where traffickers utilize different smuggling strategies, which likely makes disruption more difficult compared to land routes.<sup>vii</sup>

- As of 23 February, Malaysia's security forces installed security wire at 27 border crossing routes with Thailand and are seeking funding to block 69 additional crossing sites and prevent drug trafficking over land, according to a source with second-hand access who may have intended to influence as well as inform.<sup>viii</sup>
- A 20 June 2025 joint seizure involving the Philippines' Navy and Drug Enforcement Agency—the second that month—of a fishing vessel transporting 1.5 tons of methamphetamine may be the largest in the Navy's history and triggered intensified maritime patrols, according to a source with first-hand access who may have intended to influence as well as inform and a source with second-hand access and a reliable reporting record.<sup>ix</sup>



## East Asia Pacific: Transnational Threats

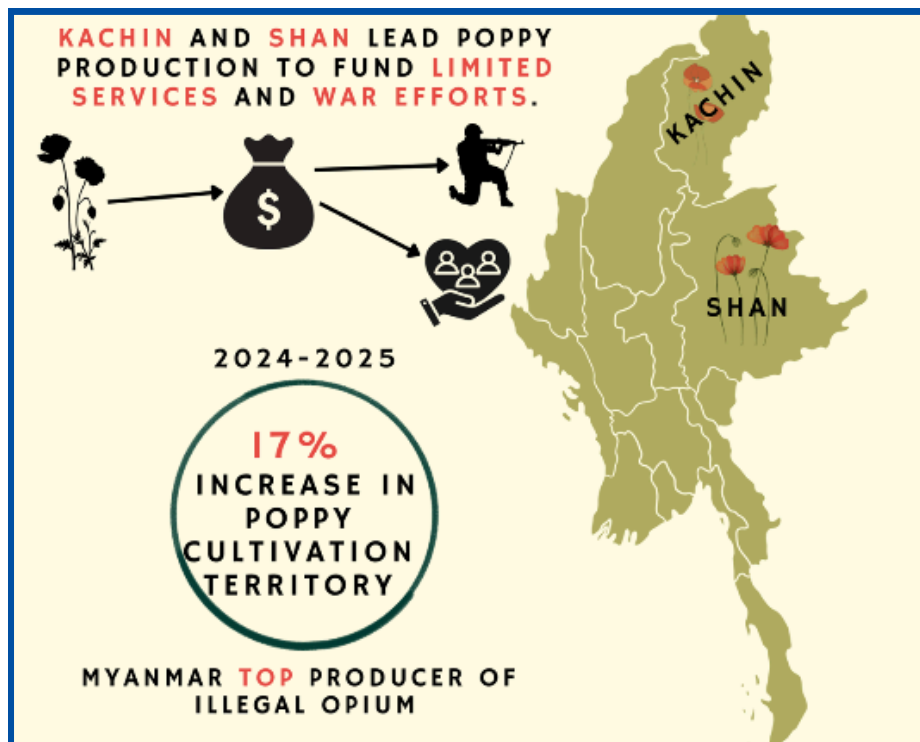


Figure showing increase in opium poppy cultivation territory within Myanmar, as well as the most significant areas of poppy growth.<sup>x</sup>

### Source Summary Statement

We have high confidence in the overall evidentiary basis of this product. We draw from sources with first- and secondhand access to information and reliable reporting records. Some sources have possible motivations to mislead, so we corroborate their information with external sources. Intelligence gaps in this product include the amount of illegal drugs that have reached markets as a result of production in Myanmar; prevalence of the production of additional illegal drugs in Myanmar; and details of specific groups within Myanmar that are especially prevalent in opium or methamphetamine production and their operations.



# East Asia Pacific: Transnational Threats

---

## Notes

<sup>i</sup> Council on Foreign Relations | <https://www.cfr.org/global-conflict-tracker/conflict/rohingya-crisis-myanmar> | Civil War in Myanmar | 29 January 2026 | Source has second-hand access and a reliable reporting record.

<sup>ii</sup> United Nations Office on Drugs and Crime | [https://www.unodc.org/roseap/uploads/documents/Publications/2025/Myanmar\\_Opium\\_survey\\_2025\\_web.pdf](https://www.unodc.org/roseap/uploads/documents/Publications/2025/Myanmar_Opium_survey_2025_web.pdf) | Myanmar Opium Survey 2025 Cultivation, Production, and Implications | December 2025 | Source has first-hand access and an established reporting record. ; IISS | <https://myanmar.iiss.org/dashboard> | Myanmar Conflict Map | 03 March 2026 | Source has second-hand access and an established reporting record.

<sup>iii</sup> Rafaella Lipschitz | <https://newlinesinstitute.org/global-security-mil-priorities/the-golden-triangles-methamphetamine-crisis-and-strategic-implications-for-the-indo-pacific/> | The Golden Triangle's Methamphetamine Crisis | 25 August 2025 | Source has second-hand access to information and may intend to influence as well as inform. ; Zsombor Peter | <https://www.dw.com/en/myanmar-drug-production-booming-amid-civil-war/a-75032190> | Myanmar: Drug production booming amid civil war | 07 December 2025 | Source has first- and second-hand access and an established reporting record. ; The White House | <https://www.govinfo.gov/content/pkg/CMR-PREX26-00188487/pdf/CMR-PREX26-00188487.pdf> | National Drug Control Strategy FY 2025 Budget Summary | 21 June 2024 | Source has first-hand access to information and an established reporting record. ; The White House | <https://www.whitehouse.gov/wp-content/uploads/2025/04/2025-Trump-Administration-Drug-Policy-Priorities.pdf> | Statement of Drug Policy Priorities | 01 April 2025 | Source has first-hand access to information and an established reporting record.

<sup>iv</sup> United Nations Office on Drugs and Crime | [https://www.unodc.org/roseap/uploads/documents/Publications/2025/Myanmar\\_Opium\\_survey\\_2025\\_web.pdf](https://www.unodc.org/roseap/uploads/documents/Publications/2025/Myanmar_Opium_survey_2025_web.pdf) | Myanmar Opium Survey 2025 Cultivation, Production, and Implications | December 2025.

<sup>v</sup> Zsombor Peter | <https://www.dw.com/en/myanmar-drug-production-booming-amid-civil-war/a-75032190> | Myanmar: Drug production booming amid civil war | 07 December 2025.

<sup>vi</sup> AP News | <https://apnews.com/article/myanmar-drugs-heroin-methamphetamine-ice-opium-mongyai-6605677cf5f995988b9458bc1977a836> | Myanmar's military government claims a record seizure of illicit drugs at production sites | 15 January 2026.

<sup>vii</sup> United Nations Office on Drugs and Crime | [https://www.unodc.org/roseap/uploads/documents/Publications/2025/Synthetic\\_Drugs\\_in\\_East\\_and\\_Southeast\\_Asia\\_2025.pdf](https://www.unodc.org/roseap/uploads/documents/Publications/2025/Synthetic_Drugs_in_East_and_Southeast_Asia_2025.pdf) | Synthetic Drugs in East and Southeast Asia Latest Developments and Challenges | 28 May 2025 | Source has second-hand access to information and a reliable reporting record.

<sup>viii</sup> Bangkok Post | <https://www.bangkokpost.com/thailand/general/3203350/malaysia-to-install-more-security-wire-on-illegal-routes-bordering-thailand> | Malaysia to install more security wire on illegal routes bordering Thailand | 23 February 2026.

<sup>ix</sup> Philippine News Agency | <https://www.pna.gov.ph/articles/1252575> | PH Navy, PDEA seize 1.5 tons of 'shabu' off Zambales | 20 June 2025. ; ABS CBN | <https://www.abs-cbn.com/news/regions/2025/6/20/p10-b-suspected-shabu-seized-from-fishing-vessel-off-zambales-0902> | P10-B suspected shabu seized from fishing vessel off Zambales | 20 June 2025.

<sup>x</sup> United Nations Office on Drugs and Crime | [https://www.unodc.org/roseap/uploads/documents/Publications/2025/Myanmar\\_Opium\\_survey\\_2025\\_web.pdf](https://www.unodc.org/roseap/uploads/documents/Publications/2025/Myanmar_Opium_survey_2025_web.pdf) | Myanmar Opium Survey 2025 Cultivation, Production, and Implications | December 2025 | Source has first-hand access and an established reporting record. ; Alastair MacBeath | <https://globalinitiative.net/wp-content/uploads/2025/03/Alastair-MacBeath-Cashing-in-on-conflict-Illicit-economies-and-the-Myanmar-civil-war-GI-TOC-March-2025.pdf> | Cashing in on Conflict Illicit Economies and the Myanmar Civil War | March 2025 | Source has second-hand access and a reliable reporting record.



## North Korean Cryptocurrency Scams Likely to Generate Increased Revenue for Pyongyang in the Next Year

Authors: Patrick Rochette

Division Chief: Evan Miller & Team Lead: Kyla Jamieson

Editor: Marlee Warwick

Graphic Designer: Matthew Parada

---

*We assess with high confidence that North Korean crypto scams will increase in quantity and sophistication in the next 3-6 months to continue generating essential revenue for North Korea's government.* Pyongyang needs additional funds as it looks to modernize its army and deploy new weapons capabilities, including submarines, hypersonic glide systems, and intercontinental ballistic missiles. North Korea uses manipulation tactics, deceptive contractual agreements, and sophisticated phishing attacks against large, centralized exchanges as well as individual crypto investors.<sup>ii</sup> These efforts generate billions of dollars for the North Korean government, and the sophistication of these attacks allows them to go unnoticed and makes them harder to trace.

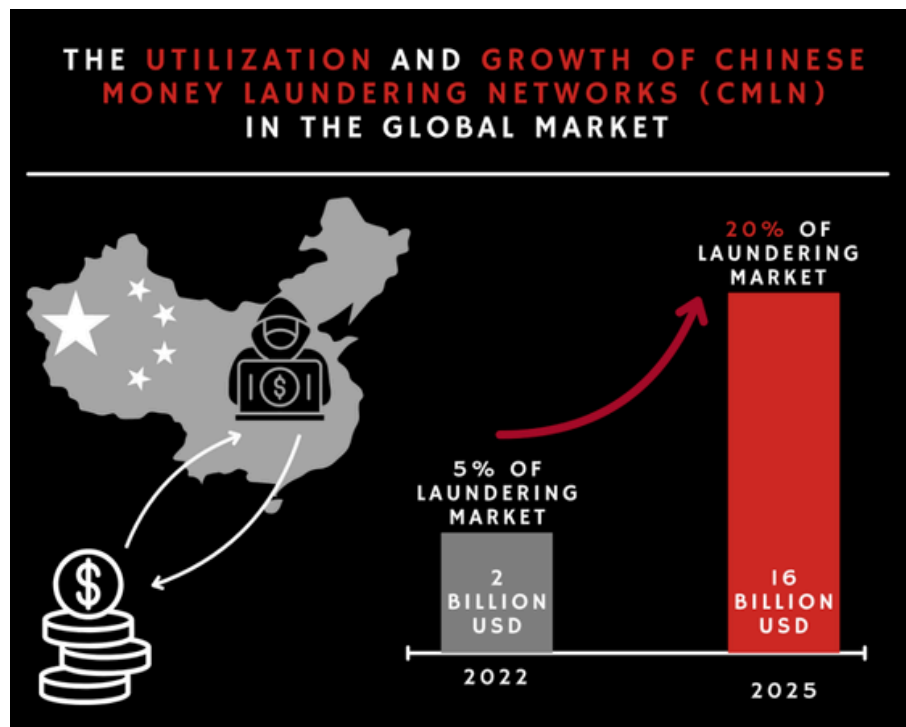
- The Democratic People's Republic of Korea (DPRK) was responsible for 158,000 incidents of individual wallet compromises in 2025, according to a reliable and credible source as well as a source that lacks an established reporting record or verifiable access.<sup>iii</sup>
- North Korean attacks have recently shifted from crypto bridges—smaller services acting as crypto currency conversions—to larger, centralized exchanges with wider consumer use, such as investment banks, facilitating more damage from its scams and hacks, according to a reliable source with secondhand access.<sup>iv</sup>
- North Korea also uses more sophisticated software to better exfiltrate data from targets, evolving from earlier techniques and increasing its ability to bypass internal security systems, according to a credible cybersecurity firm.<sup>v</sup>

*We assess with high confidence that Chinese Money Laundering Networks (CMLNs) using cryptocurrencies will play an increasing role in aiding North Korea to launder money and work around existing U.S. sanctions in the next 3-6 months.* North Korean hackers have historically relied on Chinese infrastructure and internet networks; thus, they already have the skills to function on Chinese internet servers and around existing Chinese restrictions with relative ease. North Korea benefits from VIP status in many CMLNs because North Korean money laundering efforts involve high value cryptocurrency. North Korea stores much of funds in front companies and underground banks in China, to which CMLNs can rapidly transfer funds.

- CMLNs processed 16.1 billion USD in 2025, making up 20% of the crypto money laundering market - up from 5% in 2022; many CMLNs provide legitimate exchange features which further obfuscates stolen assets, according to a credible source with secondhand access.<sup>vi</sup>
- Stolen funds are moved to bank accounts which are leased from ordinary citizens acting as money mules, allowing North Korea to access the Chinese banking sector, according to multiple credible cryptocurrency analysis firms.<sup>vii</sup>
- China serves as a bridge for North Korean money launderers who move funds through a complex web of Over the Counter services. China provides money laundering channels funneling these funds into North Korean shell companies and underground banks which provide North Korea legitimate access to banking services in China, according to a reliable source with secondhand access.<sup>viii</sup>



## East Asia Pacific: Transnational Threats



*Figure showing how CMLN's launder money through China.<sup>ix</sup>*

### Source Summary Statement

We assess with high confidence that this body of reporting is both credible, reliable and supports the judgments drawn in the analysis, with most sources having second-hand access. Some sources, such as Chainalysis, are the most reliable sources in the cryptocurrency analysis sphere, which analyze blockchain transactions and describe the methods of North Korean scams. The body of evidence further includes multiple sources on both methods on how North Korean hackers gain access, as well as blockchain analysis on where and how the stolen assets are moved to North Korean accounts. We are missing information on specific actors and groups who carry out these attacks. The hacker groups are identifiable as North Korean due to their style and methods of attacks. However, many hacking groups remain anonymous, which is a persistent intelligence gap.



# East Asia Pacific: Transnational Threats

---

## Notes

<sup>i</sup> Vann H. Van Diepen | <https://www.38north.org/2026/01/assessing-north-koreas-five-year-effort-to-develop-13-new-nuclear-and-missile-systems/> | Assessing North Korea's Five-Year Effort to Develop 13 New Nuclear and Missile Systems | 30 January 2026 | The source is a reliable western research and analysis nonprofit with secondhand access.

<sup>ii</sup> Vann H. Van Diepen | <https://www.38north.org/2026/01/assessing-north-koreas-five-year-effort-to-develop-13-new-nuclear-and-missile-systems/> | Assessing North Korea's Five-Year Effort to Develop 13 New Nuclear and Missile Systems | 30 January 2026 | The source is a reliable western research and analysis nonprofit with secondhand access.

<sup>iii</sup> Chainalysis Team | <https://www.chainalysis.com/blog/crypto-hacking-stolen-funds-2026/> | North Korea Drives Record \$2 Billion Crypto Theft Year, Pushing All-Time Total to \$6.75 Billion | 18 December 2025 ; Lisa Monica & Ramdhani Pratama | <https://www.idnfinancials.com/news/59806/north-korean-hackers-steal-2-bn-crypto-now-targeting-private-wallet> | North Korean hackers steal \$2 bn crypto, now targeting private wallet | 23 December 2025

<sup>iv</sup> TRM Team | <https://www.trmlabs.com/resources/blog/north-korea-and-the-industrialization-of-cryptocurrency-theft> | North Korea and the Industrialization of Cryptocurrency Theft | 18 December 2025

<sup>v</sup> TRM Team | <https://www.trmlabs.com/resources/blog/north-korea-and-the-industrialization-of-cryptocurrency-theft> | North Korea and the Industrialization of Cryptocurrency Theft | 18 December 2025 ; Peter Kálnai & Matěj Havránek | <https://www.welivesecurity.com/en/eset-research/deceptive-development-from-primitive-crypto-theft-to-sophisticated-ai-based-deception/> | DeceptiveDevelopment: From primitive crypto theft to sophisticated AI-based deception | 25 September 2025

<sup>vi</sup> Sunha Bae | <https://www.csis.org/analysis/hidden-enablers-third-countries-north-koreas-cyber-playbook#:~:text=Northeastern%20Chinese%20cities%2C%20such%20as,for%20North%20Korean%20cyber%20operations> | Hidden Enablers: Third Countries in North Korea's Cyber Playbook | 25 July 2025

<sup>vii</sup> Chainalysis Team | <https://www.chainalysis.com/blog/2026-crypto-money-laundering/> | Chinese Language Money Laundering Networks Emerge as Major Facilitators of the Illicit Crypto Economy, Now Driving 20% of Laundering Activity | 27 January 2026 ; TRM Team | <https://www.trmlabs.com/resources/blog/north-korea-and-the-industrialization-of-cryptocurrency-theft> | North Korea and the Industrialization of Cryptocurrency Theft | 18 December 2025

<sup>viii</sup> Sunha Bae | <https://www.csis.org/analysis/hidden-enablers-third-countries-north-koreas-cyber-playbook#:~:text=Northeastern%20Chinese%20cities%2C%20such%20as,for%20North%20Korean%20cyber%20operations> | Hidden Enablers: Third Countries in North Korea's Cyber Playbook | 25 July 2025

<sup>ix</sup> Chainalysis Team | <https://www.chainalysis.com/blog/2026-crypto-money-laundering/> | Chinese Language Money Laundering Networks Emerge as Major Facilitators of the Illicit Crypto Economy, Now Driving 20% of Laundering Activity | 27 January 2026



# Eurasia Division



## Ukraine-Russia Drone Arms Race Likely to Escalate in the Next 3-6 Months

Authors: Nick Mayronne, Julia Alexander, Caroline Stock, María Agostini

Division Chief: Matthew Laubsted & Team Lead: Nick Mayronne

Editor: Sara Huta

Graphic Design: Nick Mayronne, Caroline Stock

---

*We assess with moderate confidence that Ukraine and Russia's simultaneous rapid adaptation of Unmanned Aerial Systems (UAS) tactics, will drive an intensified drone arms race in the next 3-6 months, which will force NATO and European allies to accelerate investment into drone technology, marking a shift in modern warfare.* Ukraine's "Drone Wall" tactics are expanding large, unmanned kill zones along the front lines of the battlefield, enabling the detection of covert Russian forces.<sup>i</sup> European allies are beginning the process of further defense industrialization, as innovation in Ukraine drives new adaptations and demand for drone technology. Russian upgrades are also likely pushing NATO to respond with investments of its own, signaling a combined effort to drive competition in the drone arms race.<sup>ii</sup> While Ukraine likely holds a narrow advantage in emerging drone technology, Russia leads in large-scale production of adapted UAS technology.

- Ukrainian civilian UAS manufacturing efforts are producing low-cost robotics systems responsible for 70% of battlefield strikes, according to multiple Ukrainian government officials with reliable track records of reporting and firsthand access.<sup>iii</sup>
- Since 2025, Russian UAS have enhanced their surveillance and disruption of Ukrainian communications, according to a U.S.-based think tank with a reliable track record of reporting and secondhand access.<sup>iv</sup>
- NATO's E5 nations (France, Poland, Germany, the United Kingdom, and Italy) pledged investments into the developing Ukrainian UAS industry to counter Russian UAS capabilities and to support Ukrainian efforts, according to NATO, a reliable source with first-hand access.<sup>v</sup>

*We assess with moderate confidence that advances in counter-UAS capabilities for both Ukraine and Russia will trigger reciprocal investment in Electronic Warfare and layered air-defense systems in the next 3-6 months, raising the overall cost and complexity of maintaining an aerial advantage.* Ukraine is currently deploying mobile lightweight jamming defense against drones, effectively increasing security costs for Russian ground troops.<sup>vi</sup> The development of novel, complex systems by Ukraine is probably improving force capability as Ukrainian forces consistently update layered air defense and counter-UAS capabilities to maintain threat platforms. While effectively stalemated, Ukraine's ability to utilize and update technology against a larger Russian force shows the effectiveness of Ukrainian battlefield adaptations.

- Russia is investing in artificial intelligence to improve drone warfare capabilities through enhanced targeting and detection, according to a credible U.S. think tank with a reliable track record for reporting and secondhand access.<sup>vii</sup>
- Russia is also expanding Electronic Warfare systems by bolstering its defense architecture with satellite jamming technology, according to a U.S.-based defense outlet with a reliable track record for reporting and secondhand access.<sup>viii</sup>
- Ukraine's layered air defense combines long-range Patriot missile defense systems, combined with medium-range NASAMS & IRIS-T systems incorporated with short-range Gepard guns and MANPADS. Ukraine continually updates the integrated defense system to combat and intercept evolving Russian aerial threats, according to a media journal based in the U.S. with a reliable track record for reporting and thirdhand access.<sup>ix</sup>



## Eurasia: Military and Cyber

*We assess with moderate confidence that drone-enabled targeting along the Ukrainian frontline has eroded and expanded kill zones, which will increase the lethality and scale of drone-based conflict in the next 3-6 months.*

Ukrainian increased production of low-cost First Person View (FPV) drones is enhancing precision strike capabilities, almost certainly increasing the attrition of infantry and critical infrastructure. Ukrainian fiber optic sea-launched drones extend kill zones into maritime areas, including previously insulated naval targets in the Black Sea. The integration of attack drones into satellite systems has enabled Russia to bypass Ukrainian electronic warfare systems, likely opening the possibility for greater offensives in Ukraine. These developments likely reinforce a cycle of competitive adaptations, increasing the lethality and scale of drone-based conflict as the war in Ukraine progresses.<sup>x</sup>

- Russian military assets are depleting as Ukrainian kill zones extend to the rear of Russian troop deployments, according to a U.S.-based think tank with a reliable track record of reporting.<sup>xi</sup>
- Russia repurposed the Russian Geran-2, an outdated drone platform, to operate as a “mothership” drone, which allows for FPVs to deploy further into Ukrainian territory, extending the Russian kill zones, according to the same source.<sup>xiii</sup>
- Ukraine is utilizing multiple maritime platforms to disrupt Russian naval operations. The Sub-Sea-Baby platform has proven itself capable of sinking a Kilo-class Russian submarine and multiple oil tankers, according to multiple reliable sources.<sup>xii</sup>
- Russia is using Starlink-type satellite technology with its BM-35 attack drones. This systematic integration allows for Russian drones to avoid radio frequency jamming. Drones armed with air-to-air missiles will be capable of using this enhanced Geran-4 satellite technology, according to a pro-U.S. independent drone reporting outlet with a mixed track record of reporting.<sup>xiiii</sup>

### Source Summary Statement

We assess with moderate confidence that the sources used in this analysis are reliable, credible, timely, and sufficiently support our analytical judgments. The majority are secondary sources derived from publicly available information, including reporting and analysis that reflects predominantly U.S., NATO, and Ukrainian perspectives. While this may introduce western bias, the information is cross-referenced and corroborated with additional open-source materials. Taken together, the sources provide a consistent and substantiated foundation for our assessments. We have intelligence gaps surrounding Russian intentions vis-à-vis specific systems.



*This map illustrates the expanded drone kill zones along the Ukraine-Russia frontline as of March 2026, highlighting Ukrainian long-range strikes into Russian rear areas, maritime drone operations in the Black Sea, and Russian drone ranges. Image generated with NotebookLM and Google Gemini.*



## Notes

<sup>i</sup> Lesia Orobets | <https://www.atlanticcouncil.org/blogs/ukrainealert/drone-superpower-ukraine-can-teach-europe-how-to-defend-itself/> | Drone superpower Ukraine can teach Europe how to defend itself | 30 January 2026 | Respected U.S. thinktank with a proven track record.

<sup>ii</sup> David Hambling | <https://www.forbes.com/sites/davidhambling/2026/02/26/learning-at-war-speed-how-ukraines-air-defence-evolves/> | Learning At War Speed: How Ukraine's Air Defence Is Evolving | 26 February 2026 | U.S. media journal; reliable track record, thirdhand access.

<sup>iii</sup> Samuel Bendett & David Kirichenko | <https://lieber.westpoint.edu/continuing-autonomous-arms-race/> | Ukraine Symposium – The Continuing Autonomous Arms Race | 18 February 2025 | High-credibility, West Point symposium; reliable experts, secondhand battlefield analysis. ; Marcus Welsch | <https://www.kyiv-dialogue.org/en/news/newsreader/ukraine-air-war-monitor-vol-xi.html> | Ukraine Air War Monitor Vol. XI | 10 December 2025 | OSINT monitor; reliable data analysis, secondhand from Ukrainian AF reports.

<sup>iv</sup> David Kirichenko | <https://cepa.org/article/ukraine-needs-new-mid-range-strike-drones/> | Ukraine Needs New Mid-Range Strike Drones - CEPA | 6 January 2026 | CEPA analysis; reliable think tank with secondhand access

<sup>v</sup> Mircea Geoană | <https://www.nato.int/en/news-and-events/events/transcripts/2026/02/20/statement-by-the-nato-deputy-secretary-general-at-the-meeting-of-the-european-group-of-5-defence-ministers?selectedLocale=> | Statement by the NATO Deputy Secretary General at the Meeting of the European Group of 5 Defence Ministers | February 2026 | Official NATO transcript; firsthand access—source from leadership.

<sup>vi</sup> inside unmanned systems | <https://insideunmannedsystems.com/nato-brings-industry-to-brussels-for-c-uas-week-ramps-up-counter-drone-efforts> | NATO Brings Industry to Brussels for C-UAS Week | 28 January 2026 | Strong reliability, secondhand NATO event reporting.

<sup>vii</sup> CSIS | <https://www.csis.org/analysis/russia-ukraine-drone-war-innovation-frontlines-and-beyond> | Russia-Ukraine Drone War: Innovation on the Frontlines and Beyond | 28 May 2025 | U.S. think tank; strong credibility, reliable track record, second-hand access

<sup>viii</sup> Steve Balestrieri | <https://nationalsecurityjournal.org/russias-military-is-a-drone-superpower/> | Russia's Military Is a Drone 'Superpower' | 4 June 2025 | U.S. based defense outlet; reliable track record, secondhand access

<sup>ix</sup> David Hambling | <https://www.forbes.com/sites/davidhambling/2026/02/26/learning-at-war-speed-how-ukraines-air-defence-evolves/> | Learning At War Speed: How Ukraine's Air Defence Is Evolving | 26 February 2026 | U.S. media journal; reliable track record, thirdhand access.

<sup>x</sup> Jack Rear & Christopher Miller | <https://ig.ft.com/ukraine-kill-zone/> | The Ukraine kill zone: how drones are changing the battlefield | 21 February 2026 | Financial Times interactive; highly credible journalism, firsthand frontline embeds.

<sup>xi</sup> Institute for the Study of War (ISW) | <https://understandingwar.org/research/russia-ukraine/russian-offensive-campaign-assessment-february-19-2026/> | Russian Offensive Campaign Assessment, February 19, 2026 | 19 February 2026 | OSINT think tank; reliable daily analysis, thirdhand from Ukrainian reports.



## Notes

<sup>xii</sup> Efrem Lukatsky | <https://www.defensenews.com/global/europe/2025/10/22/ukraine-unveils-upgraded-sea-drone-for-black-sea-strike-missions/> | Ukraine unveils upgraded sea drone for Black Sea strike missions | 22 October 2025 | Defense News is highly reliable, secondhand from SBU demo and officials. ; Leo Chiu | <https://www.kyivpost.com/post/66281> | Russia Loses Submarine to Ukrainian Underwater Drone in Unprecedented Attack | 15 December 2025 | Ukrainian outlet; credible frontline reporting, secondhand from military sources. ; Howard Altman | <https://www.twz.com/sea/ukraine-now-using-drone-boats-to-attack-russian-riverine-targets> | Ukraine Now Using Drone Boats to Attack Russian Riverine Targets | 21 December 2024 | Respected defense outlet; detailed OSINT reporting, secondhand from Ukrainian video and statements.

<sup>xiii</sup> Drone Warfare | <https://drone-warfare.com/2026/01/19/unmanned-systems-warfare-analysis-jan-12-18-2026> | Unmanned Systems Warfare Analysis, Jan 12–18, 2026 | 19 January 2026 | OSINT specialist site; reliable weekly trends, thirdhand from Telegram/frontline reports.



## Ukrainian Strikes Will Likely Limit Russian Gains from Energy Market Windfalls

Author: Connor Hull, Conner Cole, Marlee Warwick  
Division Chief: Matthew Laubsted & Team Lead: Evan Michaels  
Editor: Sara Huta

---

*We assess that sustained Ukrainian strikes on Russian crude oil export capabilities will likely further constrain Moscow's ability to fund and sustain military operations over the next six months.* Crude oil and gas exports constitute 25% of Russia's federal budget, making them instrumental to funding Russia's military offensive in Ukraine.<sup>i</sup> Ukraine's targeted campaign of drone attacks on Russian energy transport and refineries in 2025 cost Russia \$12.9 billion in revenue.<sup>ii</sup> Russia must export at least 4 million barrels of oil per day, worth \$195 million, to sustain daily combat operations in Ukraine.<sup>iii</sup> Ukrainian drone strikes from March-April 2026 struck crude oil export sites along the Baltic ports of Primorsk and Ust-Luga, and the Black Sea port of Novorossiysk.<sup>iv</sup>

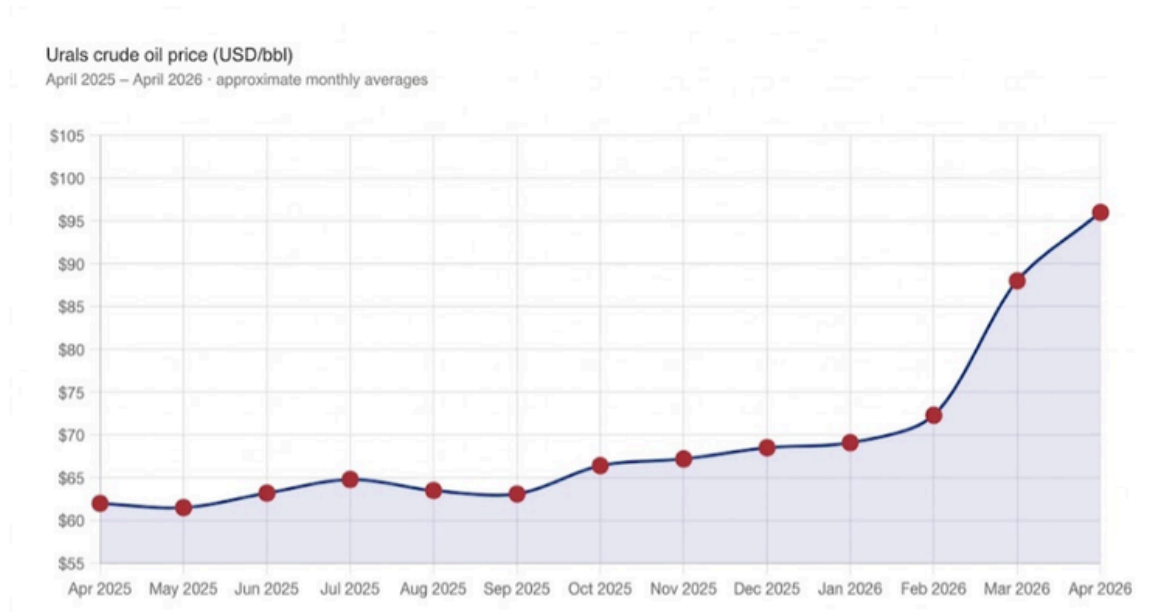
- The March-April 2026 drone strikes shut down 40% of Russia's oil export capability, or around two million barrels per day, according to a source with secondhand access and a reliable track record of reporting.<sup>v</sup>
- Russian refineries are considering rerouting oil exports through the ports of Vysotsk and Taman, which have lower export capacities and higher shipping costs due to overland transport, according to a source with secondhand access and a reliable track record of reporting.<sup>vi</sup>

*We assess that Ukrainian drone strikes on Russian energy transport infrastructure will likely increase over the next three months, in order to offset Russian revenue generated from oil price increases amid the war in Iran, limiting Moscow's surplus energy profits.* Russian oil revenues collapsed by \$1.5 billion month-on-month to \$9.5 billion in February 2026, the lowest level since the full-scale invasion of Ukraine.<sup>vii</sup> However, the onset of the war in Iran caused the price per barrel of Russian Urals oil to jump from \$62.52 per barrel on March 1 to \$110.73 on 18 March.<sup>viii</sup> In the same month, Ukraine's Unmanned Systems Forces expressed a desire to further target Russia's energy export infrastructure, which would likely create an oil build-up and a shortage of storage and export capacity.<sup>ix</sup>

- Russian earnings from energy exports initially reached \$591 million per day in the two weeks following the start of the war in Iran on 28 February, up from \$542 million per day in February, according to a source with secondhand access and a reliable track record of reporting.<sup>x</sup>
- Ukrainian drone strikes on Russian energy infrastructure more than doubled from four strikes in February to 10 strikes in March, according to a source with secondhand access and a reliable track record of reporting.<sup>xi</sup>



# Eurasia: Political and Economic



*Graph showing April 2025 to April 2026 price spikes of Russian Urals crude oil price, in dollars per barrel.<sup>xiii</sup>*

## Source Summary Statement

We assess with moderate confidence that this body of reporting is credible and reliable. While the body of reporting is primarily sources with secondhand access, they are reliable and credible. The body of evidence further includes a diversity of economic and energy-related reporting on Russia and the military activity of Ukraine. Current intelligence gaps include how Russia intends to adapt to subsequent Ukrainian strikes on its oil export infrastructure and Ukraine's military capacity to prolong its drone strike campaign targeting Russian energy infrastructure.



## Notes

- <sup>i</sup> Reuters Staff | <https://www.reuters.com/business/energy/russias-oil-gas-budget-revenue-set-sink-46-january-reuters-calculations-show-2026-01-19/> | Russia's Oil and Gas Budget Revenue Set to Sink 46% in January, Reuters Calculations Show | 19 January 2026
- <sup>ii</sup> The Moscow Times Staff | <https://www.themoscowtimes.com/2026/02/09/ukrainian-strikes-cost-russian-oil-sector-over-13bln-in-2025-insurers-say-a91894> | Ukrainian Strikes Cost Russian Oil Sector over \$13Bln in 2025, Insurers Say | 9 February 2026
- <sup>iii</sup> Gabriel Collins | <https://gabrielcollins.substack.com/p/barrels-and-bombs-how-does-oil-fund> | Barrels and Bombs: How Does Oil Fund Russia's War Machine? | 17 December 2025
- <sup>iv</sup> Guy Faulconbridge and Barbara Lewis | <https://www.reuters.com/business/energy/least-40-russias-oil-export-capacity-halted-reuters-calculations-show-2026-03-25/> | Exclusive: At Least 40% of Russia's Oil Export Capacity Halted, Reuters Calculations Show | 25 March 2026
- <sup>v</sup> Guy Faulconbridge & Barbara Lewis | <https://www.reuters.com/business/energy/least-40-russias-oil-export-capacity-halted-reuters-calculations-show-2026-03-25/> | Exclusive: At Least 40% of Russia's Oil Export Capacity Halted, Reuters Calculations Show | 25 March 2026
- <sup>vi</sup> Mark Porter | <https://www.reuters.com/business/energy/russian-oil-terminals-under-attack-unable-accept-shipments-second-week-sources-2026-04-03/> | Russian Oil Terminals under Attack Unable to Accept Shipments for Second Week, Sources Say | 3 April 2026
- <sup>vii</sup> Hnat Kulish | <https://kse.ua/about-the-school/news/russian-oil-tracker-march-2026-export-volumes-and-revenues-collapse-in-february-as-war-in-iran-drives-oil-prices-and-russia-s-revenue-outlook-sharply-higher/> | Russian Oil Tracker – March 2026 | 1 April 2026
- <sup>viii</sup> Oil Price Authors | <https://oilprice.com/oil-price-charts/> | Oil Price Charts | 6 April 2026
- <sup>ix</sup> Christopher Miller, Max Seddon, and Anastasia Stognei | <https://www.ft.com/content/d49e288f-b74e-44a8-a2f3-ec87f7cb5c27?syn-25a6b1a6=1> | Ukraine's Drones Dent Russia's War-Fuelled Oil Windfall | 6 April 2026
- <sup>x</sup> Tamsin Paternoster | <https://www.euronews.com/my-europe/2026/03/19/russia-pocketing-billions-from-two-weeks-of-war-in-iran-data-shows> | Russia Pocketing Billions from Two Weeks of War in Iran, Data Shows | 19 March 2026
- <sup>xi</sup> Gabriel Collins | <https://www.bakerinstitute.org/research/quantifying-ukraines-strikes-russian-energy-infrastructure> | Quantifying Ukraine's Strikes on Russian Energy Infrastructure | 2 March 2026
- <sup>xii</sup> Oil Price Authors | <https://oilprice.com/oil-price-charts/> | Oil Price Charts | 6 April 2026 | AI-generated graph using Notebook LM based on data from a reliable, second-hand source.



# Europe Division



## Europe's Defense Industrial Base Likely Unable to Reach Self-Sufficiency in the Near-Term

Author: Faith McFall, Daijie Li

Division Chief: Thomas W Gormley & Team Lead: Jack Buckley

Editor: Julia G Alexander

Graphic: Faith McFall

---

*We assess with moderate confidence that the European Union's (EU) Defense Industrial Base (DIB) will not achieve self-sufficiency in military equipment production within the next year, because of structural dependence on foreign suppliers and persistent constraints in scaling domestic production.* The bloc has not generated the domestic arms production needed to offset existing dependencies on non-EU member states, despite the European defense industry undergoing a rapid investment in response to the war in Ukraine. Europe has attempted use regulation to address this reliance, such as the 35% cap on non-EU defense components passed by the European Council in December 2025.<sup>i</sup> But EU militaries likely remain reliant on foreign equipment and basic inputs while Europe's economy lacks the labor need for a self-sufficient DIB.

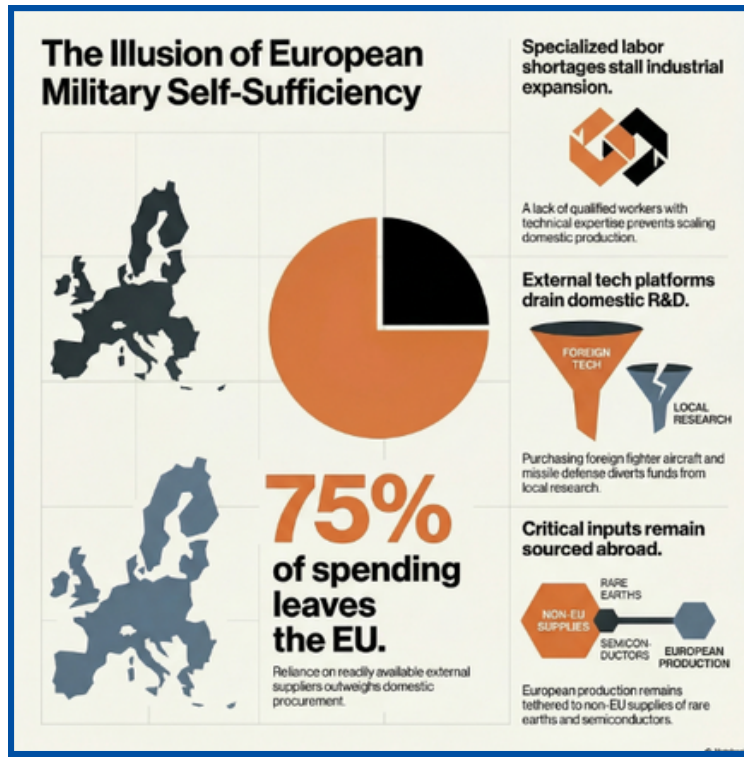
- Despite increases in European defense spending, approximately 75% of recent European defense procurement has been directed to non-EU suppliers due to reliance on readily available external suppliers, constrained industrial scaling, and persistent delays in delivering collaborative defense initiatives according to a reliable and credible source with access to European defense procurement data.<sup>ii</sup>
- A lack of qualified workers with specialized technical expertise required to produce military equipment within the EU will continue to constrain defense industrial expansion, according to a reliable source with secondhand access to European Commission planning.<sup>iii</sup>
- European Parliamentary findings note that increased investment in Europe's DIB will not reduce near-term dependence on vital non-EU inputs, as production remains dependent on access to rare earths and semiconductors, according to a credible independent analysis source.<sup>iv</sup>
- European defense demand is growing five to six times faster than DIB output, with defense orders doubling between 2025 and early 2026 while production capacity has increased only marginally, according to multiple sources with second-hand access that lacked track records of reliable reporting, including independent defense analysis and first-hand government publication.<sup>v</sup>

### Source Summary Statement

We assess, with high confidence, that this body of reporting is credible, reliable, and corroborated to support analytical judgements. This body of reporting contains first-hand information from EU governing bodies alongside European news outlets. The evidentiary base spans multiple countries and EU bodies reflecting a multitude of limitations facing Europe's DIB. While open-source reporting on specific procurement priorities is not entirely available and European economies have differing levels of DIB development not reflected in an EU-wide analysis, the convergence of reporting provides a reasonable basis for assessing the self-sufficiency of EU members' militaries.



# Europe: Military and Cyber



*European Union's Struggle for Self Sufficiency.<sup>iii</sup>*

## Notes

<sup>i</sup> European Council | <https://www.consilium.europa.eu/en/press/press-releases/2025/12/08/european-defence-industry-programme-council-gives-final-approval/> | European Defence Industry Programme: Council Gives Final Approval | 8 December 2025 | First hand, intergovernmental official publication; high reliability; single source

<sup>ii</sup> Satta, Marianna | <https://atlasinstitute.org/industrial-attrition-europes-defence-procurement-paradox> | Industrial Attrition: Europe's Defence Procurement Paradox | 21 February 2026 | p. 1

<sup>iii</sup> Alice Tidey | <https://www.euronews.com/my-europe/2025/11/19/eu-aims-to-retrain-600000-workers-for-defence-sector-to-eliminate-skills-shortage> | EU aims to retrain 600,000 workers for defence sector to eliminate skills shortage | 19 November 2025 |

<sup>iv</sup> Tobias Cremer | [https://www.europarl.europa.eu/doceo/document/A-10-2026-0017\\_EN.html](https://www.europarl.europa.eu/doceo/document/A-10-2026-0017_EN.html) | REPORT on tackling barriers to the single market for defence | 6 February 2026 |

<sup>v</sup> Air Street Press and Nathan Benaich | <https://press.airstreet.com/p/european-defense-entering-2026> | Europe Woke Up from Its Security Slumber at Munich in 2025. Now It Has to Deliver in 2026 | 16 January 2026 | (Second-hand; independent defense analysis; high reliability.) ; European Commission | [https://commission.europa.eu/topics/defence/future-european-defence\\_en](https://commission.europa.eu/topics/defence/future-european-defence_en) | Acting on Defense to Protect Europeans | 19 November 2025 | (First-hand, governmental official publication; high reliability; single source.)

<sup>vi</sup> NotebookLM | [notebooklm.google.com](https://notebooklm.google.com) | The Illusion of European Military Self-Sufficiency | 04 April 2026 | Derived from associated analytic product.



## Northern Europe Likely to Face Continued Energy Price Volatility and Supply Chain Disruptions

Authors: Matthew Gower and Jack Pate

Division Chief: Thomas Gormely & Team Lead: Jack Pate

Editors: Julia Alexander

Graphic Designer: Matthew Gower

---

*We assess with high confidence that Northern European countries will remain vulnerable to temporary disruptions and elevated energy prices through the rest of 2026 because of their continued reliance on imported gas, Russian LNG export dependence, and infrastructure and security weaknesses.* Russia has both the capability and intent to exploit European energy dependencies as a coercive instrument, enabling Moscow to generate energy revenue that support its war effort in Ukraine while using supply pressure to impose economic costs on Europe. The risk of disruptions to major LNG terminals and gas storage facilities along the North and Baltic Sea will likely increase, reducing supply flows to the rest of Europe and raising the likelihood of regional energy outages. Northern Europe's energy infrastructure is vulnerable to outages and undersea sabotage, posing a risk of broader shortages across Europe. Northern Europe has diversified its renewable energy sources since 2022 and has expanded its LNG supply but remains subject to widespread physical shortages of natural gas due to dependence on imported gas.

- Russia supplied 12% of total EU gas imports and 14% of EU LNG imports in Q2 2025. This is below the pre-2022 dependence. Russian LNG still affects European Union (EU) market pricing and creates residual exposure for Northern European economies tied to regional gas hubs and LNG trade flows, according to a credible, official EU institutional source with a track record of collecting and publishing standardized energy-market statistics.<sup>i</sup>
- Several security vulnerabilities, including aging infrastructure and underinvestment in countering potential saboteurs, such as isolated or coordinated Russian shadow fleet attacks, persist in the processes in which Northern European countries secure, manage, and construct LNG, according to a credible, independent EU-funded think tank.<sup>ii</sup> Recent acts of sabotage in January 2026 on Baltic Sea undersea cables showcase further vulnerabilities for LNG in the region. Undersea infrastructure security, meaning sabotage, cable or pipeline damage, or related logistics disruptions, remains a concern for Northern European countries, according to a credible independent news agency.<sup>iii</sup>
- EU gas storage was approximately 32% full in late February 2026, compared with a five-year average of 49%, increasing the likelihood of price spikes as states compete for LNG cargoes to refill inventories. Northern European countries will be in a competitive market to secure LNG during shortages. Late winter and pre-refill periods remain vulnerable to short-term market stress, according to a credible financial-news wire with a track record of reliable reporting on markets based on market data and official/industry sourcing.<sup>iv</sup>

*We assess with moderate confidence that Northern Europe will experience instability in specific locations and elevated prices, rather than a region-wide LNG supply failure through the rest of 2026, because multi-origin supplier relationships provide sufficient redundancy to absorb localized shocks without cascading into systemic collapse.* Country-specific supply shortages and price increases are likely driven by infrastructure constraints and difficulty in fulfilling import requests. Northern Europe's diversification measures, stronger interconnection, and expected growth in global LNG supply reduce the probability of broad shortages, but infrastructure incidents and transition-related volatility will continue to pressure the market. Recent damage to undersea cables by suspected Russian-linked trading vessels highlights Northern Europe's limited capacity to defend maritime assets and showcases critical vulnerabilities in its energy infrastructure.

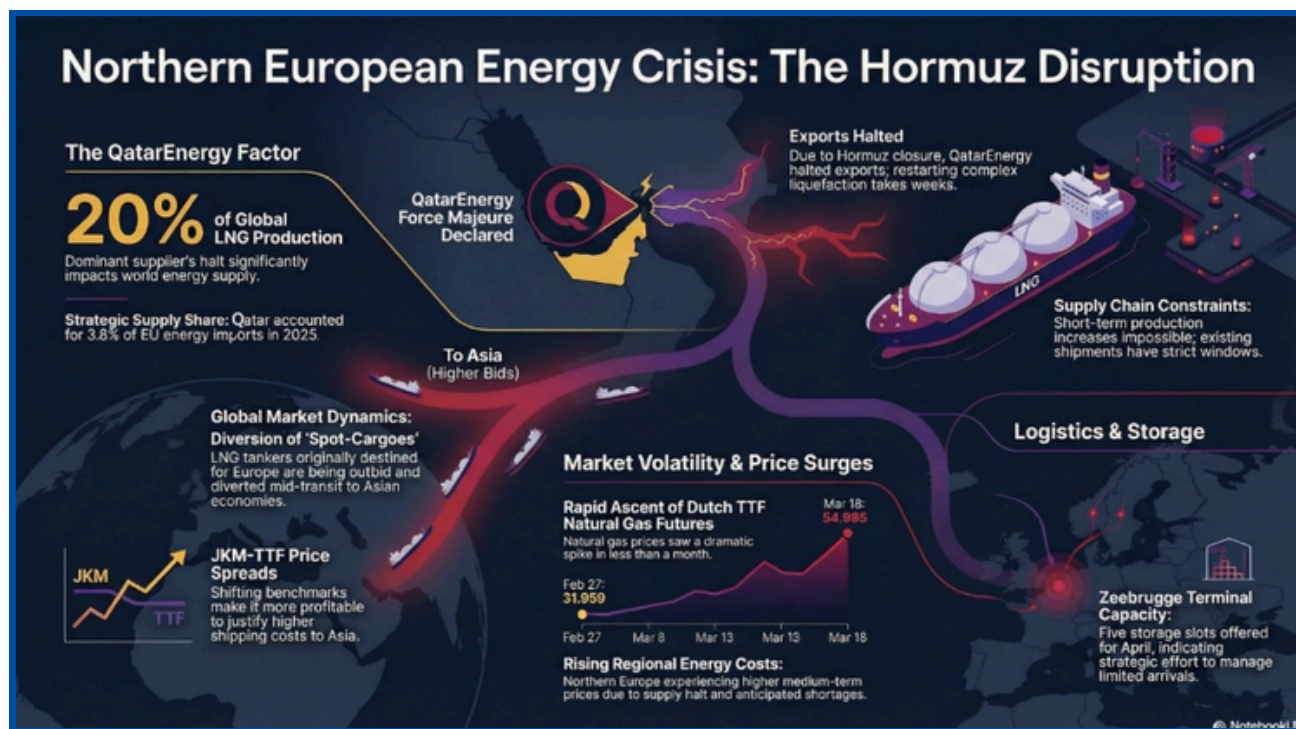
- Global LNG supply will grow by more than 7% in 2026, boosting regional supply, decreasing the chance of a region wide supply shortage, according to a highly credible intergovernmental energy organization with a track record of global gas-market monitoring.<sup>v</sup>
- The return of the Baltic connector service (the only natural gas pipeline between Finland and the rest of Europe) and broader network connects Finland and the Baltics to LNG supply and storage infrastructure, showing intent to improve resilience in the region, according to a body of sources, including firsthand access, a credible official government energy institution focused on regional energy security, and a credible policy think tank.<sup>vi</sup>



## Europe: Political and Economic

We assess with high confidence that Northern Europe will experience higher energy prices through the rest of 2026, due to the closure of the Strait of Hormuz. Given Europe's increased reliance on LNG imports since 2022, Northern European countries play an especially crucial role in supplying the European LNG market through increased investments in coastal LNG infrastructure interconnected with the rest of Europe. Shortages of LNG can impact North Europe's domestic consumption and ability to export LNG to inland European countries from coastal terminals. QatarEnergy—a significant supplier of LNG to Europe—has temporarily halted production due to the closure of the strait and attacks on production facilities. Asian economies that are much more dependent on LNG exports from Qatar can outbid remaining sources of LNG, which limits options even further for Northern Europe to address shortages.

- Qatar Energy declared force majeure (inability to fulfill a contract due to unforeseen circumstances) on its exports. Restarting production would take weeks at best due to the lengthy liquefaction process. QatarEnergy has offered up 5 of its storage slots in Belgium's Zeebrugge LNG terminal for the month of April, indicating a prolonged closure of shipments, according to a highly credible independent news agency.<sup>vii</sup>
- Qatar accounted for 3.8% of energy imports for Europe in 2025, with Northern Europe containing much of the LNG import infrastructure, according to the European Commission. The absence of shipments from Qatar and the expectation of future shortages have raised prices significantly. Natural gas futures as of 18 March have reached 54.965, compared to 31.959 on 27 February, according to the Intercontinental Exchange Index for Dutch Title Transfer Facility. Due to the nature of LNG production, suppliers are unable to significantly increase production in the short term, and shipments have a limited time to reach their destination.<sup>viii</sup>
- An additional driver of increasing LNG prices can be “spot-cargoes,” when tankers already in transit are being purchased by a higher bidder. Multiple LNG tankers have already diverted course from Europe to Asia, according to a highly credible independent news agency. Companies are now able to justify the higher shipping costs because of a higher price being offered by Asian economies compared to Northern European countries, according to a credible independent news agency.<sup>ix</sup>



Global disruptions after the Strait of Hormuz closure<sup>x</sup>



# Europe: Political and Economic

## Source Summary Statement

We assess with high confidence that these sources are credible, reliable, and provide strong support for the analysis and judgments presented. While much of the information is second-hand, the first-hand data included further strengthens and corroborates the conclusions drawn. Our assessment draws on multiple corroborating reports, ensuring a comprehensive and consistent understanding of the issue. The range of sources from multiple European countries offers a well-rounded perspective, reinforcing the validity of the conclusions, and enhances the reliability of the findings. However, many of our sources are strictly reported by governments and think tanks that provide economic data and analysis, and act more to track economic trends pertaining to LNG. We have used economic data from pre 2022 to Q1 2026. The economic data is accurate and reflects real market conditions. Attack data is more useful for assessing potential future scenarios than for attribution, as identifying perpetrators remains difficult, with suspicion largely focused on Russian-linked commercial vessels. While our firsthand access sources were useful, we did not have many and were still mostly economic data. Still, we assess that the sources used provided relevant and current information that allowed us to make confident judgments that we stand by and will be able to defend.

<sup>i</sup> European Commission | [https://energy.ec.europa.eu/document/download/d80fd3b6-6f3d-48b0-bd6e-db2f21dcd796\\_en?filename=New%20Quarterly%20Report%20on%20European%20Gas%20Markets%20Q2%202025.pdf&prefLang=fr](https://energy.ec.europa.eu/document/download/d80fd3b6-6f3d-48b0-bd6e-db2f21dcd796_en?filename=New%20Quarterly%20Report%20on%20European%20Gas%20Markets%20Q2%202025.pdf&prefLang=fr) | Quarterly Report on European Gas Markets | 2025

<sup>ii</sup> European Institute for Security Studies | <https://www.iss.europa.eu/publications/briefs/war-footing-securing-critical-energy-infrastructure> | “On a war footing: Securing critical energy infrastructure” | 25 August 2025

<sup>iii</sup> Reuters | <https://www.reuters.com/world/europe/baltic-undersea-cable-damaged-by-external-influence-sunday-latvian-broadcaster-2025-01-26/> | “Sweden opens sabotage probe into Baltic undersea cable damage” | 26 January 2025

<sup>iv</sup> Reuters | <https://www.reuters.com/markets/commodities/europes-gas-storage-is-draining-prices-reflect-no-urgency-bouso-2026-01-29/> | Europe’s gas storage is draining, but prices reflect no urgency” | 29 January 2026

<sup>v</sup> International Energy Agency | <https://www.iea.org/reports/gas-market-report-q1-2026> | Gas Market Report, Q1 2026 | 23 January 2026

<sup>vi</sup> Gasgrid Finland | <https://gasgrid.fi/en/2025/11/28/gas-market-review-the-role-of-gas-infrastructure-in-balancing-power-highlighted-strong-growth-in-biomethane-gas-use-in-finland/> | “Gas Market Review: The role of gas infrastructure in balancing power highlighted strong growth in biomethane gas use in Finland” | 28 November 2025 ; U.S. Department of Energy | <https://www.energy.gov/articles/joint-statement-us-and-baltic-countries-following-2025-baltic-31-energy-dialogue> | “Joint Statement by the U.S. and the Baltic Countries Following the 2025 Baltic 3+1 Energy Dialogue” | 12 November 2025 ; European Policy Centre | <https://www.epc.eu/publication/Battle-of-the-Baltic-Safeguarding-critical-undersea-infrastructure-645780/> | “Battle of the Baltic: Safeguarding critical undersea infrastructure” | 22 April 2025

<sup>vii</sup> Reuters | <https://www.reuters.com/business/energy/qatar-shuts-gas-liquefaction-will-take-weeks-restart-sources-say-2026-03-04/> | “Exclusive: Qatar shuts gas liquefaction, will take weeks to restart, sources say” | March 4, 2026 ; Reuters | <https://www.reuters.com/business/energy/qatar-offloads-five-lng-slots-belgiums-zeebrugge-terminal-april-sources-say-2026-03-18/> | “Qatar offloads five LNG slots at Belgium's Zeebrugge terminal for April, sources say” | 18 March 2026

<sup>viii</sup> European Council | <https://www.consilium.europa.eu/en/infographics/where-does-the-eu-s-gas-come-from/> | “Where does the EU's gas come from?” | March 17, 2026 ; ICE Index | <https://www.investing.com/commodities/ice-dutch-ttf-gas-c1-futures-historical-data> | “Dutch TTF Natural Gas Futures” | 18 March 2026 | The Intercontinental Exchange (ICE) Index is the leading benchmark for Europe’s wholesale natural gas prices.

<sup>ix</sup> Reuters | <https://www.reuters.com/business/energy/more-lng-tankers-divert-asian-buyers-seek-cargoes-2026-03-06/> | “More LNG tankers divert as Asian buyers seek cargoes” | 6 March 2026

<sup>x</sup> Matthew Gower | Graphic created using NotebookLM | 2026



## Germany Will Increase Military and Humanitarian Aid towards the Ukraine Russian War

Author: Ilana Chasin and Matthew Gower

Division Chief: Thomas Gormley & Team Lead: Jack Pate

Editor: Julia Alexander

*We assess with moderate confidence that Germany will increase military aid to Ukraine in the second half of 2026, reflecting a consensus that sustained assistance serves Germany's long-term security interests rather than representing a contingent political commitment.* As aid from non-European NATO members has decreased, pressure has risen on European governments to increase their support for Ukraine's war effort and civilian population.<sup>i</sup> Given Germany's position as Ukraine's second largest source of aid, Berlin is likely to expand its role as a provider of military, energy, and refugee assistance to Ukraine.<sup>ii</sup>

- During 2025 negotiations to draft the 2026 federal budget, the governing coalition agreed to increase military aid to Ukraine to €11.5 billion, with an additional €3 billion of spending allocated to artillery, drones, armored vehicles, and Patriot air defense systems, according to a reliable and credible source with secondhand access. The draft budget estimated a total expenditure of approximately €524.5 billion in 2026, representing a €4 billion increase over what was initially anticipated. This is the highest amount of aid sent by Germany since the start of the war in 2022.<sup>iii</sup>
- Germany is providing an additional €170 million for energy related issues in Ukraine. In 2026, Germany plans to launch the European Flagship Fund for the Reconstruction of Ukraine to enable German private sector collaboration with the Ukrainian government, according to a source with firsthand access.<sup>iv</sup> Given that Germany receives nearly no energy imports from Ukraine, this framework aims prevent further migration shocks and enable continued resiliency against Russian attacks on critical infrastructure.
- As of December 2025, over 1.2 million Ukrainian refugees in Germany are under temporary protection, according to a reliable and credible source with secondhand access.<sup>v</sup> Extending protections for Ukrainian refugees through 2027, along with efforts by Germany's Federal Employment Agency to encourage their labor market participation, indicates the government will support their continued future integration in German society.<sup>vi</sup>



Graphic describing levels of German support to Ukraine in each sector.<sup>vii</sup>



## Source Summary Statement

We assess with high confidence that this reporting is credible, reliable, and supports the judgments drawn in this analysis. The body of the report uses primarily secondhand reporting of military and humanitarian aid being sent by Germany to Ukraine. Statements from firsthand sources, including the current head of the German government, showcase not only continued but increasing levels of support to Ukraine. While the total amount of military aid sent from Germany to Ukraine in 2026 has not been published, the report examines the military aid budgets of previous years and draft budget for 2026.

## Notes

<sup>i</sup> Nöstlinger, Nette and Chris Lunday | <https://www.politico.eu/article/german-coalition-ups-military-aid-ukraine/> | German coalition ups military aid to Ukraine | 14 November 2025 | Reliable news source on the Germany's budget for military aid to Ukraine.

<sup>ii</sup> Gibadło, Linda and Jacek Tarociński | <https://www.osw.waw.pl/en/publikacje/analyses/2025-07-22/german-military-aid-ukraine-a-new-model-support> | German military aid for Ukraine: a new model of support? | 7 July 2025 | Reliable source on German military aid to Ukraine.

<sup>iii</sup> Nöstlinger, Nette and Chris Lunday | <https://www.politico.eu/article/german-coalition-ups-military-aid-ukraine/> | German coalition ups military aid to Ukraine | 14 November 2025 | Reliable news source on the Germany's budget for military aid to Ukraine.

<sup>iv</sup> Metz, Friedrich | <https://www.bundesregierung.de/breg-de/aktuelles/rede-kanzler-deutsch-ukrainisches-wirtschaftsforum-2399660> | Investitionen in die Ukraine sind Zukunftsinvestitionen | 15 December 2025 | Reliable source on German investment in Ukraine.

<sup>v</sup> Eurostat | [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Temporary\\_protection\\_for\\_persons\\_fleeing\\_Ukraine\\_-\\_monthly\\_statistics](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Temporary_protection_for_persons_fleeing_Ukraine_-_monthly_statistics) | Temporary protection for persons fleeing Ukraine - monthly statistics | 4 March 2026 | Reliable source on temporary protection status for Ukrainian refugees.

<sup>vi</sup> Bundesinstitut für Bevölkerungsforschung | [https://www.bib.bund.de/Publikation/2025/pdf/Ukrainian-Refugees-in-Germany.pdf?\\_\\_blob=publicationFile&v=2](https://www.bib.bund.de/Publikation/2025/pdf/Ukrainian-Refugees-in-Germany.pdf?__blob=publicationFile&v=2) | Ukrainian Refugees in Germany | Reliable source on Ukrainian refugees in Germany.

<sup>vii</sup> Grower, Matthew | German Strategic Aid and Ukrainian Reconstruction 2026 | 7 April 2026 | Created using NotebookLM.



# Europe: Transnational Threats

## Drug Cartels Likely Remain Resilient in Southern Europe Despite Sustained Government Intervention

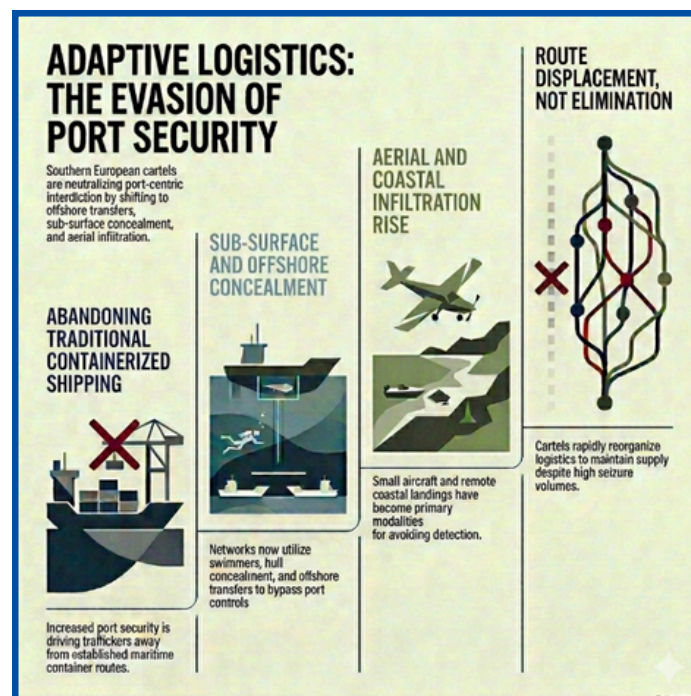
Author: Ilana Chasin and Matthew Gower

Division Chief: Thomas Gormley & Team Lead: Jack Pate

Editor: Julia Alexander

*We assess with moderate confidence that Southern European port-centric drug interdiction efforts will degrade over the next 3-6 months as cartels shift toward less conventional transportation methods.* Cross-border European cooperation has increased interdiction risk, driving the current shift toward less monitored routes and methods. Traditionally, cartels in Southern Europe used maritime containerized shipping to smuggle cocaine, cannabis, and synthetic drugs through major ports but, as interdiction risks have increased, they have shifted toward hull concealment, aerial and coastal infiltration, and frequent route changes to avoid detection.<sup>i</sup> As enforcement pressure increases at major ports, the shift toward smaller and more diffuse routes will likely reduce interdiction rates per shipment by exploiting less detectable methods of transport and smaller-scale movement of illegal substances.

- Spanish authorities dismantled a trafficking network in January 2026 that had been moving product by using swimmers and hull concealment to place cocaine on vessels away from port controls, demonstrating deliberate moves to bypass port-based security measures, according to a second-hand source with a reliable record of reporting.<sup>ii</sup>
- Offshore transfers, use of small aircraft, and coastal landings are becoming increasingly common modalities for traffickers to use to avoid detection at major points of entry, according to a January 2026 assessment from Europol, a credible first-hand source.<sup>iii</sup>
- Coordinated investigations and arrests linked to drug supply chains in Italy and Albania underscore route displacement, consistent with other adaptive behaviors seen across Southern Europe as early as November 2024, according to a credible first-hand source with a reliable record of reporting.<sup>iv</sup>



*Infographic showing how trafficking networks adapt to increased port security by shifting to offshore concealment, aerial and coastal infiltration, and flexible routing to avoid detection. Created by Emma Diehl*



# Europe: Transnational Threats

---

## Source Summary Statement

We have moderate confidence that this body of reporting is credible, reliable, and supports judgements drawn in the analysis. This body of reporting contains primarily first-hand information from European intelligence and law enforcement agencies, with support from second-hand sources in the form of news articles. The evidentiary base spans multiple countries and reflects consistent patterns in identified trafficking activities, supported by statistical data and observed observational trends. While the complete scale of drug trafficking efforts across the region remains unknown due to the secretive nature of criminal cartels, the convergence of reporting from independent sources and the used of detailed data provide a reasonable basis for assessing changes in trafficking behavior, though some gaps and uncertainties remain.

## Notes

<sup>i</sup> European Union Drugs Agency (EUDA) | [https://www.euda.europa.eu/publications/european-drug-report/2025/drug-supply-production-and-precursors\\_en](https://www.euda.europa.eu/publications/european-drug-report/2025/drug-supply-production-and-precursors_en) | Drug supply, production and precursors – the current situation in Europe (European Drug Report 2025) | 05 June 2025 | Joint EU-WCO report, credible intelligence from port authorities, reliable data, technical operational focus, publicly accessible.

<sup>ii</sup> The Guardian | <https://www.theguardian.com/world/2026/jan/15/spain-police-break-up-criminal-network-swimmers-hiding-cocaine-ships> | Spanish Police Break up Gang That Used Swimmers to Hide Cocaine on Ships | 15 January 2026 | Credible mainstream journalism, recent events, publicly accessible, reliable law enforcement reporting, verified sources cited.

<sup>iii</sup> Europol | <https://www.europol.europa.eu/media-press/newsroom/news/europol-report-evolving-tactics-in-maritime-cocaine-trafficking-operations> | Europol Report: Evolving Tactics in Maritime Cocaine Trafficking Operations – Innovative Concealment Methods and Diversified Routes Highlight the Need for Enhanced International Cooperation | 27 January 2026 | Official Europol analysis, first-hand law enforcement data, credible, technical operational details, publicly accessible.

<sup>iv</sup> Eurojust | <https://www.eurojust.europa.eu/news/crackdown-cocaine-trafficking-south-america-italy-and-albania> | Crackdown on Cocaine Trafficking from South America in Italy and Albania: 29 Arrests | 2024 | Eurojust law enforcement summary, credible arrests reporting, limited operational detail, reliable, publicly available.



# Near East Division



### Saudi Arabia Will Very Likely Seek Defense Autonomy Amid Rising Regional Threats

Author: Mathew Montiel, Mackenzie LaCombe, Katelyn Noelle

Division Chief: Skylar Hathorn & Team Lead: Katelyn Noelle

Editor: Jacob Fields

Graphic Designer: Mathew Montiel, Katelyn Noelle

---

*We assess that Saudi Arabia will very likely further diversify its foreign suppliers of air and missile procurement in the next three months to replenish its defense stocks amid rising threats from Iran.* Riyadh buys most of its weapons from the United States but has recently turned to other suppliers. Following 2023 and 2024 defense contracts, China and South Korea now supply Saudi Arabia with various ballistic missile defense systems and counter-unmanned aerial systems, eroding the United States' influence and decreasing Western market share in the Gulf.<sup>i</sup>

- Saudi Arabia requested an accelerated delivery of the Cheongung-II air defense system from South Korea following Iran's recent attacks, according to a credible source with second-hand access.<sup>ii</sup>
- The Saudi Ministry of Defense confirmed the introduction of six advanced air defense systems originating from the United States, Russia, China, Singapore, France, and Italy, according to a reliable source with second-hand access.<sup>iii</sup>
- Saudi Arabia produced its first Missile Round Pallet-Transportable (MRP-T), a critical component of the Terminal High Altitude Area Defense (THAAD) system, in May 2025, according to a well-known international defense company with first-hand access.<sup>iv</sup>

*We assess that Saudi Arabia will very likely invest in additional air defense capabilities in the next three months in response to increasing missile and unmanned aerial vehicle (UAV) threats from Iran, which will reduce its reliance on the United States.* Iran's mass-produced Shahed drone prompted Saudi Arabia to increase investments in its domestic air and missile defense capabilities. In 2025, Saudi Arabia pledged to spend over 50% of its defense spending on local production by 2030 through investments in infrastructure and human capital. Saudi Arabia created the General Authority for Military Industries and Saudi Arabian Military Industries in 2017, very likely indicating that Saudi Arabia's goal is to aggregate Riyadh's defense industry and expand investments in missile defense capabilities. The increased drone threat from Iran will likely drive Saudi Arabia to procure and develop cheaper air defense systems, which provide a better cost-exchange ratio.

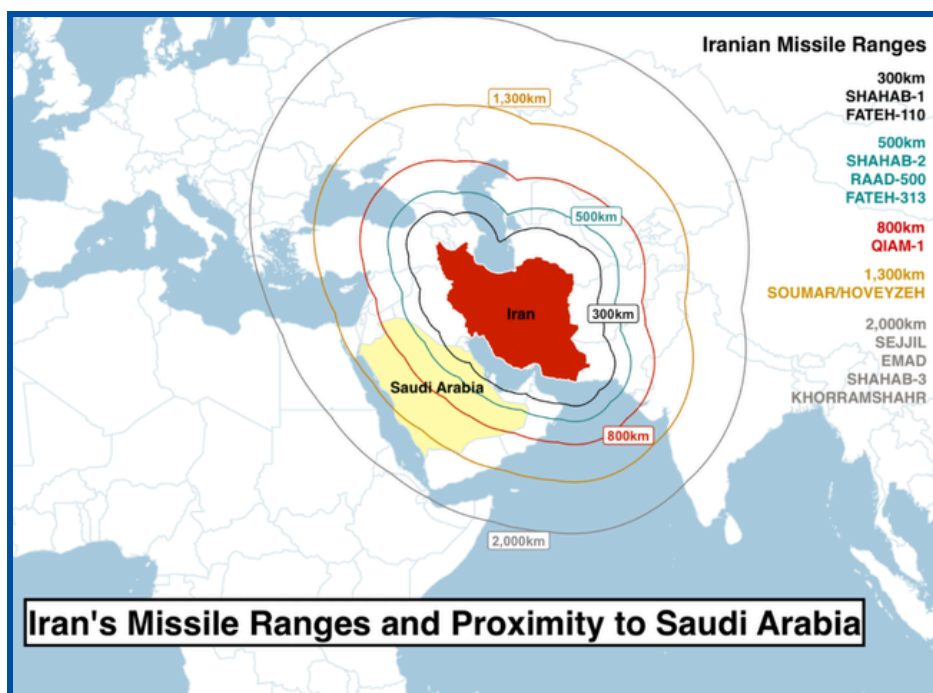
- Saudi Arabia has detected 799 drones, 86 ballistic missiles, and 9 cruise missiles since 3 March 2026, according to a pro-Saudi government source.<sup>v</sup>
- The Saudi Arabian defense industrial base has the primary goals of interceptor stockpiling and transitioning to Saudi-crewed systems, according to a pro-Saudi government source.<sup>vi</sup>
- The Saudi Arabian Military Industries signed a procurement contract for interceptor missiles with Ukraine in March 2026, according to a source closely aligned with the Saudi Royal Family.<sup>vii</sup>
- Saudi Arabia's missile defense capacity, notably its Patriot and THAAD systems, has come under strain in response to Iranian UAV and missile attacks, prompting Saudi Arabia to build up its missile defense capacity through partnerships with Gulf partners and Ukraine, according to several reliable sources with second-hand access.<sup>viii</sup>



## Near East: Military and Cyber

*We assess that Saudi Arabia will very likely expand its domestic defense industrial base capacity in the next three months, reflecting a global shift towards indigenous defense production.* Saudi Arabia is very likely expanding local defense production for both domestic use and exportability. Saudi Arabia is one of the world's top five arms importers, relying on the United States for 74% of its supplies, Spain for 10%, and France for 6.2%. Trade inconsistencies pose significant risks to Saudi Arabia's economic stability due to its reliance on a narrow export base, with oil accounting for 90% of the country's export revenue. COVID-19, the war in Ukraine, and rising tensions in the Middle East exposed supply chain vulnerabilities, very likely driving a global shift toward localized production.

- Saudi Arabia focused on economic diversification while decreasing dependence on oil revenue and foreign suppliers. In addition to increasing military operational readiness, domestic defense production creates jobs, reduces foreign supply dependence, and builds opportunities for increased international exports, according to Saudi Arabia's Vision 2030 plan.<sup>ix</sup>
- Saudi Arabia, with Chinese technical assistance, began manufacturing ballistic missiles in at least one facility near Dawadmi, Saudi Arabia, according to a Saudi-based news agency citing three sources familiar with U.S. intelligence and assessed imagery.<sup>x</sup>
- Recent contracts signed with U.S. defense companies allow Saudi Arabia to domestically produce THAAD and collaborative combat aircraft subsystems, according to several reliable sources with secondhand access.<sup>xi</sup>
- Saudi Arabia has made significant progress in achieving local assembly systems, leaving licensed modification of foreign systems and indigenous design capabilities as the final tiers of the Vision 2030 defense localization plan, according to according to a pro-Saudi government source.<sup>xii</sup>



Map of Iran's missile ranges and their proximity to Saudi Arabia.<sup>xiii</sup> Made using R Studio.

### Source Summary Statement

We assess with high confidence that the body of reporting used to inform our assessments is credible and reliable. Our analysis was based on first-hand accounts of Saudi officials speaking at conferences. We utilized think tank reporting and analysis from reputable sources with a history and specialty in foreign military capability research, which uses open-source information and expertise to inform their findings. When possible, we consulted satellite imagery and public Saudi and U.S. defense contract information to corroborate judgments. In recent analysis of Saudi Arabia's missile defense capabilities, analysts relied upon satellite imagery; however, we did not have access to high-end commercial satellite imagery. However, our report highlights the capabilities Riyadh has and will have soon, but we are not able to ascertain the intentions and motivations of the Saudi government.



# Near East: Military and Cyber

---

## Notes

- <sup>i</sup> Alan Warnes | <https://aviationweek.com/defense/missile-defense-weapons/saudi-arabia-embraces-air-defense-options> | Saudi Arabia Embraces Air Defense Options | 9 February 2026; Mobility Foresights | <https://mobilityforesights.com/product/saudi-arabia-ground-based-aircraft-and-missile-defense-system-market> | Saudi Arabia Ground-Based Aircraft and Missile Defense System Market Size, Share, Trends and Forecasts 2032 | 5 February 2026; Leah Hickert | <https://www.csis.org/analysis/saudi-arabias-strategic-vision> | Saudi Arabia's Strategic Vision | 2 December 2025 | Source is a bipartisan, nonprofit policy research organization.
- <sup>ii</sup> Lami Kim | <https://www.iiss.org/online-analysis/military-balance/2026/03/mind-the-air-defence-gap-south-koreas-burgeoning-role-in-air-and-missile-defence/> | Mind the air-defense gap: South Korea's burgeoning role in air and missile defense | 27 March 2026 | Source is a South Korean defense expert for The International Institute for Strategic Studies.
- <sup>iii</sup> Global Defense News | [https://www.armyrecognition.com/archives/archives-land-defense/land-defense-2024/saudi-arabia-reveals-integration-of-six-advanced-air-defense-systems-to-counter-modern-threats#google\\_vignette](https://www.armyrecognition.com/archives/archives-land-defense/land-defense-2024/saudi-arabia-reveals-integration-of-six-advanced-air-defense-systems-to-counter-modern-threats#google_vignette) | Saudi Arabia Reveals Integration of Six Advanced Air Defense Systems to Counter Modern Threats | 27 August 2025 | Source began reporting in 2011 on military technologies, emerging defense capabilities, and global military conflicts.
- <sup>iv</sup> Lockheed Martin Middle East (@LMMiddleEast) | <https://x.com/LMMiddleEast/status/1921510511922823635> | Milestone achieved! Tim Cahill, our Missiles and Fire Control President, joined @GAMI\_KSA and AIC Steel to celebrate the first locally ... | 12 May 2025
- <sup>v</sup> Saudi Gazette | <https://saudigazette.com.sa/article/660265/saudi-arabia/saudi-arabia-intercepts-cruise-missile-799-drones-95-missiles-detected-since-march-3> | Saudi Arabia intercepts 799 drones, 95 missiles since March 3 | 5 April 2026 | Source is a Saudi Arabian online newspaper with strong bias in favor of the Saudi Arabian government.
- <sup>vi</sup> Abdul Mohammed | <https://houseofsaud.com/saudi-defense-spending-capability-gap-iran-war/> | Saudi Arabia's \$80 Billion Military Cannot Fight Without Foreign Hands | 25 March 2026 | Source specializes in Saudi Royal Family news with an additional focus on defense and geopolitical news.
- <sup>vii</sup> Abdul Mohammed | <https://houseofsaud.com/saudi-defense-spending-capability-gap-iran-war/> | Saudi Arabia's \$80 Billion Military Cannot Fight Without Foreign Hands | 25 March 2026 | Source specializes in Saudi Royal Family news with an additional focus on defense and geopolitical news.
- <sup>viii</sup> Vitaly Shevchenko | <https://www.bbc.com/news/articles/cx2r4wxdw3no> | Ukraine signs deal with Saudi Arabia offering drone expertise | 27 March 2026 | Source is a well-known United Kingdom-based network.; Olena Harmash | <https://www.reuters.com/business/aerospace-defense/ukraine-saudi-arabia-sign-deal-defence-cooperation-zelenskiy-says-2026-03-27/> | Ukraine and Saudi Arabia sign deal on defense cooperation, Zelenskiy says | 27 March 2026
- <sup>ix</sup> Azure Strategy | <https://azure-strategy.com/the-business-of-defence-in-saudi-arabia/> | The Business of Defense in Saudi Arabia | 22 August 2025 | Source is privately owned with extensive research and analysis on the Middle East and North Africa.
- <sup>x</sup> Saudi Arabia Press | <https://saudipress.com/us-intel-and-satellite-images-show-saudi-arabia-is-now-building-its-own-ballistic-missiles-with-help-of-china> | US intel and satellite images show Saudi Arabia is now building its own ballistic missiles with help of China | 30 March 2026 | Source is a non-profit, self-funded news platform.



## Near East: Military and Cyber

---

### Notes

<sup>xi</sup> Agnes Helou | <https://breakingdefense.com/2025/12/middle-east-missiles-large-contracts-and-space-ambitions-2025-review/> | Middle East Missiles, Large Contracts and Space Ambitions: 2025 Review | 24 December 2025; Lockheed Martin | <https://www.lockheedmartin.com/en-sa/news/lockheed-martin-awards-localization-subcontracts-for-thaad-weapon-system-in-the-kingdom-of-saudi-arabia.html> | Lockheed Martin Awards Localization Subcontracts for THAAD Weapon System in the Kingdom of Saudi Arabia | 5 February 2024

<sup>xii</sup> Abdul Mohammed | <https://houseofsaud.com/saudi-defense-spending-capability-gap-iran-war/> | Saudi Arabia's \$80 Billion Military Cannot Fight Without Foreign Hands | 25 March 2026 | Source specializes in Saudi Royal Family news with an additional focus on defense and geopolitical news.

<sup>xiii</sup> Missile Defense Project | <https://missilethreat.csis.org/country/iran/> | Missiles of Iran | 3 March 2026



### Iraq's Air Defense Expansion Likely to Escalate Regional Tensions

Author: Mianna Welch, Natalie Preheim, Katelyn Noelle  
Division Chief: Skylar Hathorn & Team Lead: Katelyn Noelle  
Editor: Jacob Fields  
Graphic Designer: Katelyn Noelle

---

***We assess that Iraq's decision to align its air defense posture with Iran will likely increase its border disputes with other countries in the region in the next three months, escalating tensions and endangering U.S. assets in Iraq.***

Iraq's strengthened air defense posture is prompting regional actors to perceive Iraq as siding with Iran, despite Iraq's fragmented foreign policy and recent Iranian strikes in Iraq.<sup>i</sup> In previous cases of airspace violations, Iraq was unable to counterattack due to limited air defense.<sup>ii</sup> Recent escalations between Iran and Israel are likely prompting Iraq to strengthen its military posture and reassess its neutrality.

- Iraqi National Security Advisor Qasim al-Araji stated that Iraq will ensure Israel does not use Iraqi airspace against Iran, and KM-SAMs allow for such air defense, according to a reliable source with second-hand access.<sup>iii</sup>
- Pro-Iranian Iraqi armed groups have launched hundreds of attacks on U.S. bases in Iraq and neighboring countries since the beginning of the Iran-Israel conflict, according to multiple sources with second-hand access.<sup>iv</sup>
- Six Iranian ballistic missiles struck a Kurdish Peshmerga military base in Erbil, killing six and wounding thirty Kurdish fighters, according to a reliable source with second-hand access.<sup>v</sup>
- Iraq's National Security Council authorized the Popular Mobilization Forces, an Iranian-backed militia, to respond to attacks and exercise self-defense, increasing the risk of escalation, according to a reliable source with second-hand access.<sup>vi</sup>

***We further assess that Iraq's defense buildup is likely in response to Iran and Israel's unauthorized operations within Iraqi airspace to protect its sovereignty, limiting United States military air operations in Iraq.*** Iraq's previous air defense systems were mainly composed of AIM-7Ms, F-16s, and Russian Pantsir-S1s. As the conflict between Israel and Iran continues, Iraq's geographical location makes it vulnerable to unauthorized use of its airspace by both Iran and Israel. Iraq's Foreign Minister Fuad Hussein stated at the beginning of the conflict in June 2025 that Iraq takes a "firm position in rejecting the use of its airspace," and Baghdad's new defense contracts aim to support Iraq's defense posture against these threats.<sup>vii</sup>

- An international coalition stationed in Iraq shot down two unauthorized Iranian drones within Iraqi airspace, according to multiple sources with second-hand access.<sup>viii</sup>
- The military spokesperson for the Iraqi Prime Minister said Iraq is currently seeking to expand its air defense to protect against missile attacks in Iraqi airspace due to the Israel-Iran conflict, according to a pro-Kurdistan Democratic Party (KDP) media outlet.<sup>ix</sup>
- Iraq filed a complaint on 13 June 2025 to the United Nations regarding Israel's violation of Iraqi airspace to conduct military operations, according to multiple sources with first- and second-hand access.<sup>x</sup>



## Near East: Military and Cyber

*We assess that Iraq is likely strengthening its air defenses to diversify its domestically controlled arms catalogue and reduce reliance on Western defense procurement, limiting future coordination with the United States.* Beginning in June 2025, Iraq began expanding its air defense systems to include weapons from Europe and Eastern Asia. In December 2025, Iraq formally announced arms deals with France and South Korea to diversify its fleet and bolster its independent defense capabilities. These acquisitions likely reflect Baghdad's strategic intent to secure sovereign control of its airspace without reliance on U.S. assistance.

- Iraq plans to acquire 14 new Rafale F4 aircraft from the French aerospace company Dassault Aviation, including 10 single-seat Rafale C and 4 two-seat Rafale B jets.<sup>xii</sup> This contract also includes MICA NG and Meteor beyond-visual-range air-to-air missiles (BVRAAMs) and precision-guided bombs, according to a reliable source with second-hand access.<sup>xii</sup>
- Iraq secured an arms deal with South Korea for multiple KM-SAMs in September 2025, according to KDP-aligned and Iraqi state-aligned news sources with first-hand access and Western think tanks with track records of reliable reporting.<sup>xiii</sup>
- Air Defense Commander Lieutenant General Pilot Muhannad Ghalib al-Asadi and Head of the State of Law Coalition, Nouri al-Maliki, described these deals as necessary for Iraq to protect its own airspace from threats without assistance, according to Arab-American news outlets and Iraqi media networks with first-hand access and known biases in favor of the Iraqi government.<sup>xiv</sup>



*Map of Iraq showing Ain al-Asad Airbase and Iranian rocket attacks in Erbil.<sup>xv</sup> Generated by Gemini Pro.*

### Source Summary Statement

We assess with high confidence that this body of reporting is credible, reliable, and supportive of the analytical judgments presented. First-hand access in this reporting comes from various media outlets within the Near East region, and while some present their own judgments, they contain direct quotes from Iraqi military and government officials, which were utilized in making judgments. Some sources contain bias, including Watan News, the Ministry of Foreign Affairs of the Republic of Iraq, and Rudaw Media Network, a Kurdish media company based in Erbil, Iraq. Second-hand information comes from think tanks and analysts within the military and defense field with multiple years of experience either in analysis or reporting on this subject matter specifically. Intelligence gaps stem from limited reporting on Iraqi military action thus far. Rapid developments in the ongoing Iran-Israel conflict impact reporting and analytic confidence. Our confidence levels are also impacted by limited reporting on the Islamic Revolutionary Guard Corps' internal decision-making and Iraq's current oil-exporting crisis.



# Near East: Military and Cyber

---

## Notes

<sup>i</sup> Sarah Shamim | <https://www.aljazeera.com/news/2026/3/11/attacks-from-all-sides-why-iraq-was-dragged-into-us-israel-war-on-iran> | Why Iraq was attacked from all sides amid US-Israel war on Iran | 11 March 2026 | Al Jazeera is a well-known, Qatari state-owned media platform.

<sup>ii</sup> Shafaq News | <https://shafaq.com/en/Security/Iraq-Air-defense-deals-imminent-with-US-France-South-Korea> | Iraq: Air defense deals imminent with US, France, South Korea | 28 June 2025 | Source is a Kurdish news agency based in Baghdad that began reporting in 2011.

<sup>iii</sup> Paul Iddon | <https://amwaj.media/en/article/could-south-korea-become-iraq-s-leading-arms-supplier> | Could South Korea become Iraq's leading arms supplier? | 5 December 2025 | Source is a freelance journalist focused on Middle East affairs writing for Amwaj Media, a Middle East monitor.

<sup>iv</sup> Renad Mansour | [https://www.foreignaffairs.com/united-states/iran-war-comes-iraq?check\\_logged\\_in=1&utm\\_medium=promo\\_email&utm\\_source=lo\\_flows&utm\\_campaign=article\\_link&utm\\_term=article\\_email&utm\\_content=20260405](https://www.foreignaffairs.com/united-states/iran-war-comes-iraq?check_logged_in=1&utm_medium=promo_email&utm_source=lo_flows&utm_campaign=article_link&utm_term=article_email&utm_content=20260405) | The Iran War Comes to Iraq: Baghdad Slides Into a Conflict It Long Wanted to Escape | 31 March 2026 | Source is well-known and published by the Council on Foreign Relations; Sarah Shamim | <https://www.aljazeera.com/news/2026/3/11/attacks-from-all-sides-why-iraq-was-dragged-into-us-israel-war-on-iran> | Why Iraq was attacked from all sides amid US-Israel war on Iran | 11 March 2026 | Al Jazeera is a well-known, Qatari state-owned media platform.; Seth Frantzman | <https://www.jpost.com/middle-east/iran-news/article-888439> | With Iraqi militia attacks on US forces, Iraq edges toward Iran war frontline | 1 March 2026 | Source is an Israeli daily newspaper with over 90 years of reporting.

<sup>v</sup> Reuters | <https://www.reuters.com/world/middle-east/rocket-attack-kills-six-kurdish-peshmerga-fighters-iraqs-kurdistan-sources-say-2026-03-24/> | Rocket attack kills six Kurdish Peshmerga fighters in Iraq's Kurdistan, sources say | 24 March 2026

<sup>vi</sup> Ahmed Rasheed and Muayad Hameed | <https://www.reuters.com/world/middle-east/two-iraqs-shiite-popular-mobilization-forces-fighters-killed-airstrikes-western-2026-03-23/> | Airstrikes in Iraq on Iran-backed paramilitary alliance kill at least 15 fighters | 23 March 2026

<sup>vii</sup> Rudaw | <https://www.rudaw.net/english/middleeast/iraq/300920251> | Iraq moves to block the use of its territory in attacks on neighbors: Security official | 30 September 2025 | Source has first and secondhand access to information; however, does not have a highly reputable reporting record due to government alignment.

<sup>viii</sup> Responsible Statecraft | <https://responsiblestatecraft.org/iraq-iran-israel-war/> | Iraq on razor's edge between Iran and US interests in new war | 18 June 2025; The Defense Post | <https://thedefensepost.com/2025/06/15/iranian-drones-shot-down-iraq/> | Two Iranian Drones Shot Down in Iraq by International Coalition: Officials | 15 June 2025; Khadijat Lawal | <https://www.channelstv.com/2025/06/15/two-iranian-drones-shot-down-in-iraq-by-international-coalition-report/> | Two Iranian Drones Shot Down In Iraq By International Coalition – Report | 15 June 2025

<sup>ix</sup> Rudaw | <https://www.rudaw.net/english/middleeast/iraq/110320262> | Iraq to manufacture air defense system amid regional conflict | 11 March 2026 | Source has first and secondhand access to information; however, does not have a highly reputable reporting record due to government alignment.

<sup>x</sup> Ministry of Foreign Affairs of the Republic of Iraq | <https://mofa.gov.iq/2025/57652/> | Iraq submits complaint to UN Security Council over Israeli violations | 13 June 2025; Reuters | <https://www.reuters.com/business/aerospace-defense/iraq-says-50-israeli-warplanes-planes-violated-its-airspace-2025-06-20/> | Iraq Says 50 Israeli Warplanes Violated its Airspace | 20 June 2025

<sup>xi</sup> Paul Iddon | <https://www.forbes.com/sites/pauliddon/2026/01/05/iraq-likely-to-begin-enhancing-its-neglected-air-defense-in-2026/> | Iraq To Begin Enhancing Its Neglected Air Defense In 2026 | 5 January 2026 | Source is a freelance journalist focused on Middle East affairs.



# Near East: Military and Cyber

---

## Notes

<sup>xii</sup> Paul Iddon | <https://www.forbes.com/sites/pauliddon/2026/01/05/iraq-likely-to-begin-enhancing-its-neglected-air-defense-in-2026/> | Iraq To Begin Enhancing Its Neglected Air Defense In 2026 | 5 January 2026 | Source is a freelance journalist focused on Middle East affairs.

<sup>xiii</sup> Rudaw | <https://www.rudaw.net/english/middleeast/iraq/200620251> | Iraq to receive first delivery of Korean air defenses in ‘months’ | 20 June 2025; Shafaq News | <https://shafaq.com/en/Security/Iraq-Air-defense-deals-imminent-with-US-France-South-Korea> | Iraq: Air defense deals imminent with US, France, South Korea | 28 June 2025 | Source is an Iraqi news network describing Iraqi arms deals; Paul Iddon | <https://amwaj.media/en/article/could-south-korea-become-iraq-s-leading-arms-supplier> | Could South Korea become Iraq’s leading arms supplier? | 5 December 2025 | Source is a freelance journalist focused on Middle East affairs.

<sup>xiv</sup> Watan News | <https://www.watanserb.com/en/2025/06/30/iraq-calls-for-military-overhaul-amid-airspace-violations-and-regional-escalation/> | Iraq calls for military overhaul amid airspace violations and regional escalation | 30 June 2025 | Source is an American news source based in Washington D.C. and California; Jawad Al-Samarraie | <https://www.iraqnews.com/iraq/iraq-air-defense-advanced-missile-system-2026/> | Iraq’s air defense to receive advanced missile system in 2026 | 6 October 2025

<sup>xv</sup> Reuters | <https://www.reuters.com/world/middle-east/rocket-attack-kills-six-kurdish-peshmerga-fighters-iraqs-kurdistan-sources-say-2026-03-24/> | Rocket attack kills six Kurdish Peshmerga fighters in Iraq’s Kurdistan, sources say | 24 March 2026



### Iranian Regime IRGC Sustained but Likely to Degrade Over the Near Term

Author: Alya Elhassani, Zane Peterson

Division Chief: Skylar Hathorn & Team Lead: Alya Elhassani

Editor: Morgan Tadych, Sara Huta

Graphic Designer: Alya Elhassani

---

*We assess that Islamic Revolutionary Guard Corps (IRGC) commanders will likely maintain their authority over the next 3-6 months, which will help secure the regime's survival and the IRGC's dominant position in it.* The appointment of Mojtaba Khamenei as Supreme Leader, prompted by the 28 February 2026 killing of Ayatollah Ali Khamenei, functions as an institutional system to prevent authority collapse.<sup>i</sup> The IRGC leadership has issued a 'lifelong' allegiance pledge to Mojtaba Khamenei, though command is currently decentralized at the provincial level.<sup>ii</sup> Consequently, Tehran is conducting decentralized strikes, which preserves regime stability by enabling units to sustain a deterrent posture without relying on a central command.<sup>iii</sup>

- The IRGC has over 800,000 members and maintains control of Iran's military apparatus, which provides the organizational structure required for provincial security, according to a reliable source with secondhand access.<sup>iv</sup>
- The IRGC is operationalizing a "mosaic defense" strategy to respond to external strikes that allows provincial level commanders to make decisions and undertake action, according to Iran's Foreign Minister Abbas Araghchi and a reliable source with secondhand access.<sup>v</sup>
- Tehran maintains 50% of prewar drone capacity and functional ballistic missile assets as of 02 April 2026, and provincial IRGC units have the tools required for decentralized deterrence, according to a credible source with secondhand access.<sup>vi</sup>

*We assess that IRGC-linked shadow financial networks will likely serve as a secure source of revenue over the next three months, which will enable the regime to not only survive but also to suppress domestic political unrest.*

Following the July 2025 demonstrations, Mojtaba Khamenei's extensive illicit financial networks and the IRGC's control over the Strait of Hormuz ensured a continuous flow of oil exports to China.<sup>vii</sup> These revenue streams provided the regime with the liquid capital required to operate despite international sanctions and external economic pressure.

- Mojtaba Khamenei's USD 400 million in off-book assets are sufficient to cover the costs of provincial security units, according to a reliable source with secondhand access.<sup>viii</sup>
- Iran continues exporting oil bound for China using ship-to-ship transfers in Malaysia. At least 11.7 million barrels have been sent to China from 28 February 2026 to 10 March 2026, according to a credible source that aggregates AIS tracking data and satellite imagery.<sup>ix</sup>
- The IRGC controls 30-50% of the national economy, which ensures institutional self-sufficiency and insulates the regime from the collapsed financial sector, according to a source with an anti-Iranian bias.<sup>xv</sup>



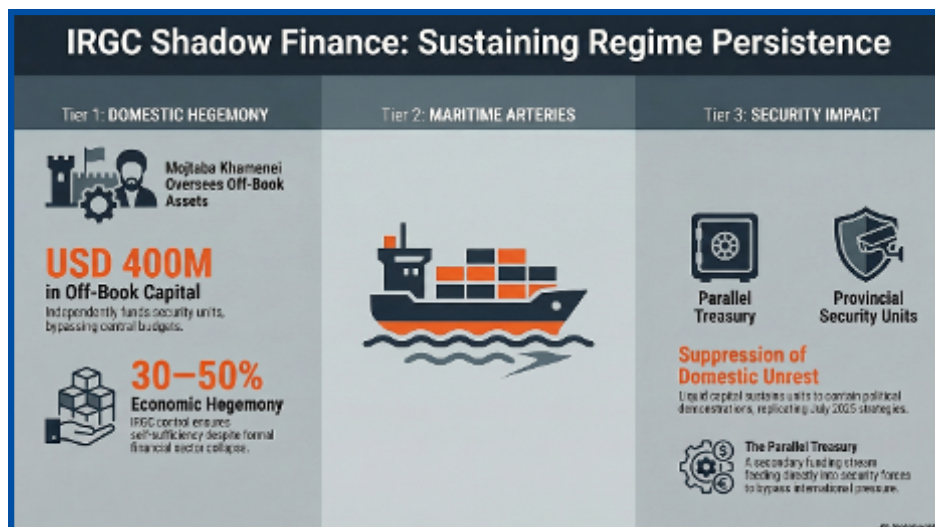
## Near East: Political and Economic

### Alternative Scenario: Strait of Hormuz Disruption Triggers Regime-Threatening Unrest

Alternatively, we considered a scenario that would undercut our assessment that IRGC command decentralization and its shadow financial networks can sustain regime stability over the next 3-6 months.

*We assess that a disruption in the Strait of Hormuz that lasts another 3-6 months will likely trigger widespread famine and political upheaval in Iran.* Although Iran's grain reserves provide inventory for approximately 5 months, the over 100% increase in food prices in 2026 has already destabilized domestic markets.<sup>x</sup> A sustained disruption in the Strait of Hormuz would likely effectively eliminate import capacity at the Bandar Imam Khomeini (BIK) entry point. BIK handles most of Iran's grain imports, as current disruptions already show a reduction in maritime flow.<sup>xi</sup> Domestic production of grain and import shipments purchased prior to 28 February 2026, will likely delay the economic impact of the closure of Hormuz but cannot prevent it.<sup>xii</sup>

- Strategic grain reserves of 7-8 million tons balanced against a 1.4-million-ton monthly consumption rate indicate 5.3-month operational window before total resource exhaustion, according to a source aggregating official Iranian data.<sup>xiii</sup>
- Stalled Iranian grain imports at the Strait of Hormuz representing 30% of total national consumption will drive a food shortage, according to a source with a reliable track record of reporting and secondhand access.<sup>xiv</sup>
- Breadlines and market-stall rushes driven by the collapse of state subsidies signal a social breakdown likely to outpace potential regime crackdown, according to a reliable source with secondhand access.<sup>xv</sup>



*Infographic showing IRGC's shadow financial network.<sup>xvi</sup> Graphic generated by Notebook LM.*

### Source Summary Statement

We assess with high confidence that this body of reporting is credible, reliable, with limited bias, and supportive of the analytical judgements presented. We relied on credible open-source reports assessing current Iranian political structure and economic reporting. We also draw evidence from credible investigative journalism. We have intelligence gaps regarding the IRGC's internal decision making, exact revenue generated from oil exports to China since 28 February 2026, and the liquidity of IRGC-linked shadow asset networks.



# Near East: Political and Economic

---

## Notes

<sup>i</sup> Guardian Staff | <https://www.theguardian.com/world/2026/mar/01/ayatollah-ali-khamenei-obituary> | Ayatollah Ali Khamenei obituary | 01 March 2026 | High credibility; baseline factual reporting confirming leadership status and official succession timeline.

<sup>ii</sup> Patrick Sykes & Dina Esfandiary | <https://www.bloomberg.com/news/articles/2026-03-02/why-iran-s-fate-lies-in-hands-of-revolutionary-guards-after-us-israel-strikes> | Why Iran's Fate Lies in the Hands of its Revolutionary Guards | 02 March 2026 | High credibility; reliable second-hand access to Western intelligence assessments regarding IRGC domestic political influence.

<sup>iii</sup> Kateryna Bondar | <https://www.csis.org/analysis/unpacking-irans-drone-campaign-gulf-early-lessons-future-drone-warfare> | Unpacking Iran's Drone Campaign: Gulf Early Lessons and Future Drone Warfare | 10 March 2026 | High credibility; premier defense analysis providing technical information of Iranian UAV operational patterns and decentralized strike capacity.

<sup>iv</sup> Patrick Sykes & Dina Esfandiary | <https://www.bloomberg.com/news/articles/2026-03-02/why-iran-s-fate-lies-in-hands-of-revolutionary-guards-after-us-israel-strikes> | Why Iran's Fate Lies in the Hands of its Revolutionary Guards | 03 February 2026 | High credibility; reliable second-hand access to Western intelligence assessments regarding IRGC domestic political influence.

<sup>v</sup> Seyed Abbas Araghchi (@araghchi) on X | 1 March 2026 | Direct admission by Iranian Foreign Minister regarding "Decentralized Mosaic Defense" infrastructure and its role in maintaining strike capability despite leadership decapitation. ; Shady Ibrahim | <https://www.aljazeera.com/features/2026/3/10/the-fourth-successor-how-iran-planned-to-fight-a-long-war-with-the-us-and-israel> | 10 March 2026 | High credibility; regional feature providing analytical insight into pre-planned 'successor' infrastructure designed to maintain operational continuity during leadership vacuums.

<sup>vi</sup> Haley Britzky, Natasha Bertrand, Jim Sciutto, Tal Shalev | [https://www.cnn.com/2026/04/02/politics/iran-missiles-us-military-strikes-trump?cid=ios\\_app](https://www.cnn.com/2026/04/02/politics/iran-missiles-us-military-strikes-trump?cid=ios_app) | Exclusive: US intelligence assesses Iran maintains significant missile launching capability, sources say | 2 April 2026

<sup>vii</sup> Anniek Bao | <https://www.cnbc.com/2026/03/11/iran-ships-oil-china-strait-hormuz-closure.html> | News Article: Iranian Oil Exports to China via Strait of Hormuz | 11 March 2026 | High credibility; tactical reporting using vessel-tracking data to confirm that Iran maintains a critical economic lifeline to China (est. 11.7 million barrels) despite the regional blockade and naval hostilities; Critical Threats Project | <https://www.criticalthreats.org/analysis/iran-update-july-6-2025> | Iran Update, July 6, 2025 | 06 July 2025 | High credibility; analysis documenting the regime's successful containment of domestic unrest following the June 2025 military strikes through localized security deployments and information control.

<sup>viii</sup> Zara Riffler | <https://www.euronews.com/2026/03/07/iran-succession-mojtaba-khamenei-linked-to-luxury-european-property-network> | 07 March 2026 | High credibility; reliable second-hand reporting providing unique access to Iranian elite financial and property networks.

<sup>ix</sup> Anniek Bao | <https://www.cnbc.com/2026/03/11/iran-ships-oil-china-strait-hormuz-closure.html> | News Article: Iranian Oil Exports to China via Strait of Hormuz | 11 March 2026 | High credibility; tactical reporting using vessel-tracking data to confirm that Iran maintains a critical economic lifeline to China (est. 11.7 million barrels) despite the regional blockade and naval hostilities.

<sup>x</sup> Pacinte Abdel-Fattah | <https://www.habtoorresearch.com/programmes/the-strait-that-starves-irans-2026-food-shock/> | Analysis: The Strait That Starves: Iran's 2026 Food Shock | 13 March 2026 | High credibility; provides economic data on hyperinflation and the resulting risk of domestic instability linked to the Strait of Hormuz closure.



## Near East: Political and Economic

---

### Notes

<sup>xii</sup> Ishan Bhanu | <https://www.kpler.com/blog/grain-imports-disrupted-across-the-middle-east-gulf> | Analysis: Grain Import Disruptions in the Persian Gulf | 06 March 2026 | High credibility; maritime commodity analysis documenting restricted grain flows in the Middle East Gulf, providing tactical validation for the assessment of Iranian food security and the vulnerability of deep-water entry points.

<sup>xiii</sup> Pacinte Abdel-Fattah | <https://www.habtoorresearch.com/programmes/the-strait-that-starves-irans-2026-food-shock/> | Analysis: The Strait That Starves: Iran's 2026 Food Shock | 13 March 2026 | High credibility; provides economic data on hyperinflation and the resulting risk of domestic instability linked to the Strait of Hormuz closure.

<sup>xiv</sup> Ishan Bhanu | <https://www.kpler.com/blog/grain-imports-disrupted-across-the-middle-east-gulf> | Analysis: Grain Import Disruptions in the Persian Gulf | 06 March 2026 | High credibility; maritime commodity analysis documenting restricted grain flows in the Middle East Gulf, providing tactical validation for the assessment of Iranian food security and the vulnerability of deep-water entry points.

<sup>xv</sup> Ayurella Horn-Muller | <https://www.motherjones.com/politics/2026/03/iran-war-strait-hormuz-fertilizer-shortage-food-supply-hunger/> | How the Iran-Israel War is Stalling the Fertilizer Shortage and Putting Millions at Risk of Hunger | 26 March 2026 | High credibility; provides tactical documentation of civilian food supply breakdown, specifically detailing protracted bread lines and market-stall rushes in urban centers.

<sup>xvi</sup> Zara Riffler | <https://www.euronews.com/2026/03/07/iran-succession-mojtaba-khamenei-linked-to-luxury-european-property-network> | 07 March 2026 | High credibility; reliable second-hand reporting providing unique access to Iranian elite financial and property networks.



# Near East: Transnational Threats

---

## Iranian-Backed Proxies Sharply Increasing Aggressive Tactics

Author: Nicholas Gelston, Zane Peterson

Division Chief: Skylar Hathorn & Team Lead: Nicholas Gelston

Editor: Joey Stabile, Morgan Tadych, Sara Huta

---

***We assess that Yemen's Houthis will very likely increase the frequency of attacks against Israel and disrupt shipping in the Bab Al Mandeb Strait over the next three months, which will raise the cost of energy and disrupt supply chains for the U.S. and its allies.*** The Houthis—part of Iran's so-called “Axis of Resistance”—disrupted shipping through Bab Al Mandeb to pressure Israel during its 2024 Gaza campaign. The Houthis likely favor a reactive military posture, often following Iranian action with their own strikes.

- The Houthis targeted Southern Israel with a barrage of ballistic missiles on 28 March 2026. It marked their first attack against Israel since the October 2025 ceasefire in Gaza and signals a shift from rhetorical support to direct military action, ending the informal détente between the two sides, according to a body of credible reporting.<sup>i</sup>
- The Houthis also launched a subsequent barrage of ballistic missiles at the Jaffa region in Israel as part of a coordinated assault with Hezbollah and Iran. Attacks will not “stop at this level,” with future attacks conditioned on escalation or de-escalation between the U.S. and Iran, according to a 2 April 2026 statement by the official spokesperson of the Houthis' Armed Forces, Yahya Saree.<sup>ii</sup>
- The Houthis have threatened to close the Bab Al Mandeb Strait, stating it is “among our options,” according to several credible second-hand sources.<sup>iii</sup>

***We assess that Lebanese Hezbollah will very likely conduct sustained rocket and drone attacks on Israel over the next three months, increasingly adopting a more emboldened posture.*** Since 2 March 2026, Hezbollah has launched approximately 540 drone and rocket attacks against Israel.<sup>iv</sup> Despite retaliation from Israel resulting in decreased domestic credibility for Hezbollah and the deaths of 1,238 people in Lebanon, sustained strikes from Hezbollah very likely indicate its willingness to continue attacks despite the heavy costs.<sup>v</sup>

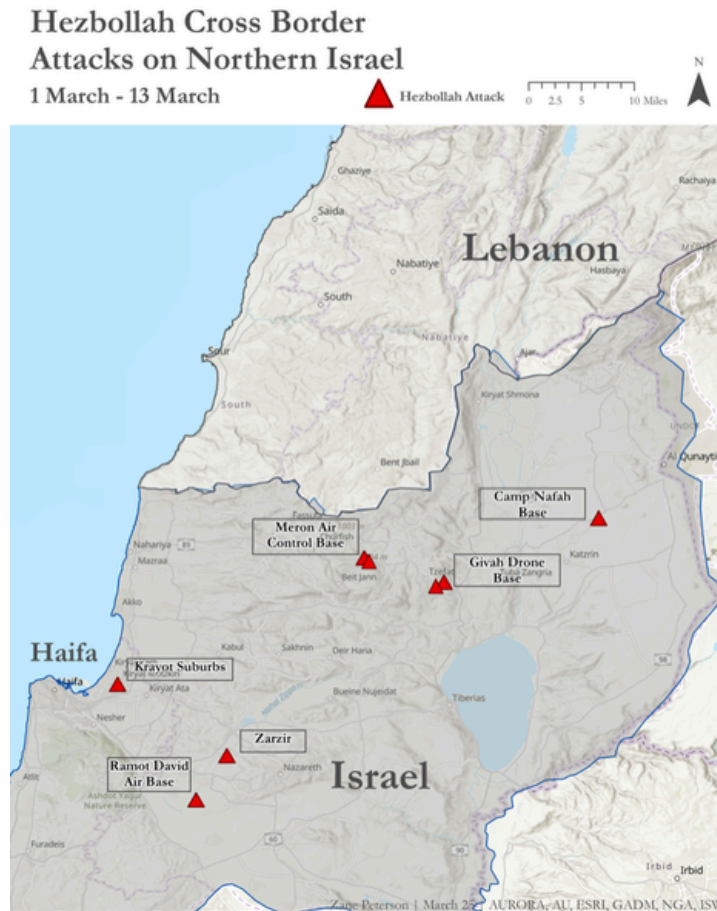
- Hezbollah's rocket and drone attacks on Northern Israel targeted Ramat David Air Base, the Golan Heights, and Haifa. Hezbollah claims it was retaliating for the killing of Iranian leader Ayatollah Ali Khamenei, according to a body of credible second-hand sources.<sup>vi</sup>
- Hezbollah claimed 25 rocket and drone attacks on Israeli forces on 12 March and 13 March, according to a reputable think-tank with a strong record of conflict analysis.<sup>vii</sup>

***We assess that the Iran-aligned Islamic Resistance in Iraq (IRI) will very likely launch operations against U.S. facilities and citizens in Iraq and the region over the next three months to increase the costs of U.S. operations against Iran.*** Multiple factions under the IRI umbrella, with a history of attacking U.S. assets, claimed attacks on the bases of their “enemies” without naming specific targets. Pro-Iran factions under the IRI have also begun targeting and kidnapping Americans. These actions very likely signal increased operational capacity aligned with Iranian objectives and reduced concern about retaliation.

- The IRI conducted twenty-eight missile and drone operations “against enemy bases in Iraq and the region” at the start of the war. Although we cannot verify that these attacks specifically targeted U.S. bases, these claims underscore the IRI's increased operational tempo and alignment with Iranian objectives, according to second-hand reporting by Sabereen News.<sup>viii</sup>
- A faction within the IRI is launching attacks on U.S. interests, including claimed attacks on U.S. bases in Erbil on 1 March and multiple operations against U.S. bases inside and outside of Iraq on 12 March, according to first-hand statements made by Saraya Awliya al Dam. Regional media correspondents reported blasts in Erbil on the same night as the purported attacks.<sup>ix</sup>
- Kataib Hezbollah—an Iraqi militia under the IRI banner that is at the forefront of strikes against U.S. targets in Iraq and the broader region—kidnapped American journalist Shelly Kittleson on 31 March 2026, according to a news outlet with a track record of reliable reporting.<sup>x</sup> Her kidnapping is the first high-profile hostage-taking in Iraq since the conflict began.



# Near East: Transnational Threats



Map showing Lebanese Hezbollah attacks on Northern Israel on 1-13 March 2026.<sup>xi</sup> Created in ArcGIS Pro.

## Source Summary Statement

We assess with high confidence that this body of evidence is reliable and credible. We draw from diverse sources, including from major international media outlets, regional media outlets, think tanks, and primary statements from proxy groups and their members. We used statements from X, Telegram, Houthi state-run outlets, and Sabereen News solely to assess their posture and not for factual verification. Because U.S. and regional media reporting on IRI targets is limited, we cannot reliably verify specific locations of the IRI attacks, only that they are increasing in number. A lack of Israeli reporting on Houthi and Lebanese Hezbollah attacks limits our ability to quantify the damage. The true extent of Iran's direct command and control over proxy operations remains unclear. However, credible sources provide evidence that shows these proxies are aligned and act in support of Iran.



# Near East: Transnational Threats

---

## Notes

<sup>i</sup> Barak Ravid | <https://www.axios.com/2026/03/28/houthis-iran-war-israel-missile> | Houthis join the Iran war, launch missile at Israel | 28 March 2026; Richard Hall | <https://time.com/article/2026/03/28/iran-war-news-houthis-israel/> | 28 March 2026; Bridget Toomey | <https://www.longwarjournal.org/archives/2026/03/yemens-houthis-enter-iran-war-with-drone-and-missile-attacks-on-israel.php> | Yemen's Houthis enter Iran war with drone and missile attacks on Israel | 28 March 2026

<sup>ii</sup> Saba News | <https://saba.ye/ar/news3655990.htm> | Text of the Supreme Leaders Speech Regarding the Developments of the Aggression Against Iran | 28 February 2026 | Houthi-controlled news outlet which publishes resistance messaging; reliable for messaging but not facts.; Al Jazeera | <https://www.facebook.com/aljazeera/videos/houthi-military-spokesman-yahya-saree-says-their-forces-have-fired-a-salvo-of-ba/1606750223944617/> | 2 April 2026

<sup>iii</sup> Middle East Monitor | <https://www.middleeastmonitor.com/20260329-closure-of-bab-al-mandeb-likely-amid-iran-us-war-houthi-official/> | Closure of Bab Al-Mandeb 'likely' amid Iran-US war: Houthi official | 29 March 2026; Priyanka Shankar | <https://www.aljazeera.com/news/2026/3/29/houthis-open-new-front-in-iran-war-will-yemeni-group-block-bab-al-mandeb> | Houthis open new front in Iran war: Will Yemeni group block Bab al-Mandeb? | 28 March 2026; The Times of Israel | <https://www.timesofisrael.com/yemens-houthis-threaten-potential-closure-of-key-red-sea-strait-if-gulf-states-join-war/> | Yemen's Houthis threaten potential closure of key Red Sea strait if Gulf states join war | 2 April 2026

<sup>iv</sup> Institute for the Study of War | <https://understandingwar.org/research/middle-east/iran-update-special-report-march-30-2026/> | Iran Update Special Report | 30 March 2026 | Reliable and Credible think-tank with long track record of Iran conflict updates

<sup>v</sup> Good Morning America | <https://www.goodmorningamerica.com/International/live-updates/iran-live-updates-trumps-48-hour-deadline-expire-131316431/49-killed-in-lebanon-sunday-health-ministry-131526553> | 49 killed in Lebanon Sunday: Health ministry | 30 March 2026 | Generally reliable major U.S. media outlet relaying Lebanese official death tolls

<sup>vi</sup> AA | <https://www.aa.com.tr/en/middle-east/hezbollah-says-it-struck-israeli-bases-with-rockets-and-drones/3847649> | Hezbollah says it struck Israeli bases with rockets and drones | 3 March 2026 ; Alice Cuddy et. al | <https://www.bbc.com/news/articles/c5y4v8g13wxo> | Israel strikes Lebanon after Hezbollah rocket fire as Iran conflict widens | 2 March 2026 ; Matthew Loh | <https://www.businessinsider.com/middle-east-war-spill-open-further-hezbollah-strikes-beirut-idf-2026-3> | War in the Middle East spills further open as Hezbollah and Israel trade strikes | 2 March 2026 ; Christina Goldbaum | <https://www.nytimes.com/live/2026/03/02/world/iran-us-israel-attack-trump> | Iran Escalates Retaliatory Strikes | 2 March 2026 ; Middle East Eye | <https://www.middleeasteye.net/live-blog/live-blog-update/hezbollah-strikes-israeli-bases-after-lebanon-raids> | Hezbollah strikes Israeli bases after Lebanon raids | 3 March 2026 | Left-leaning regional news organization, reliable for factual reporting but with a visible editorial stance

<sup>vii</sup> Institute for the Study of War | <https://understandingwar.org/research/middle-east/iran-update-evening-special-report-march-13-2026/> | Iran Update Evening Special Report, March 13, 2026 | 13 March 2026



# Near East: Transnational Threats

---

## Notes

<sup>viii</sup> Saraya Awliya al Dam | <https://t.me/awlialdm/189> | 1 March 2026 | Propaganda Telegram channel from the group used solely for resistance faction messaging; Mohammad Sio | <https://www.aa.com.tr/en/middle-east/explosions-heard-at-erbil-airport-in-iraq-amid-reports-of-iranian-strike/3845628> | Explosions heard at Erbil airport in Iraq amid reports of Iranian strike | 1 March 2026 | Turkish state-run news agency with reliable reporting despite government ties

<sup>ix</sup> Erica Solomon and Falih Hassan | <https://www.nytimes.com/2026/04/01/world/middleeast/shelly-kittleson-kidnapping-iraq.html?searchResultPosition=2> | Iraqi Militia Offers to Negotiate Release of Kidnapped U.S. Journalist | 1 April 2026 | A credible and reliable media organization in the United States

<sup>x</sup> Institute for the Study of War | Iran Update | 13 March 2026 | Country boundaries from GADM; world baselayer from ESRI (NOAA and NGA data); Strike locations geocoded by AURORA NEA/TT team.



# **South and Central Asia Division**



## Pakistan's Internal Security Very Likely to be Threatened by Increased Militant Attacks

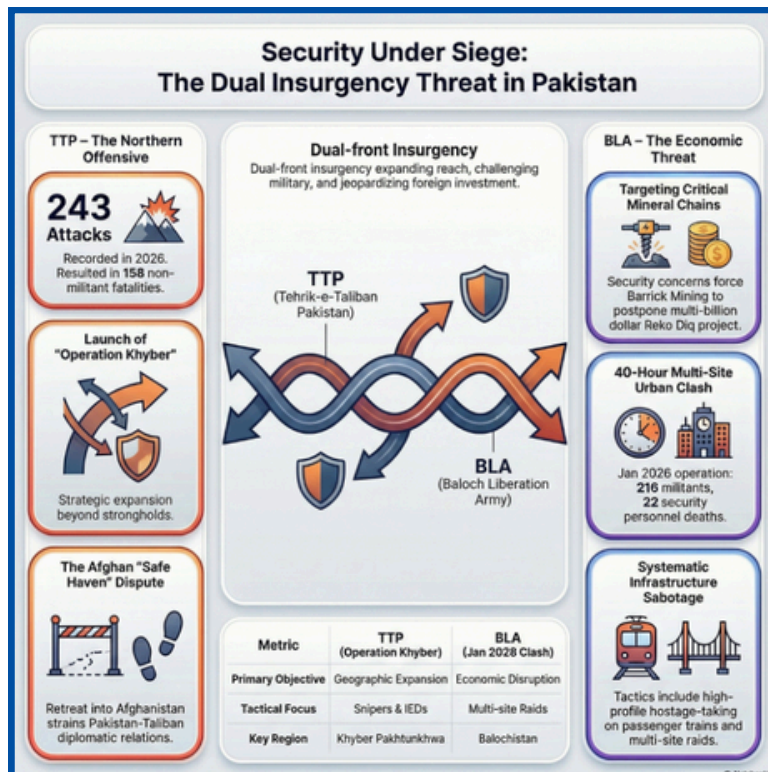
Author: Hawa Amiri

Division Chief: Samuel Goodpaster & Team Lead: Christopher Trimper Jr.

Editor: William Parnell

*We assess with high confidence that Tehrik-e-Taliban Pakistan (TTP) will increase the frequency and scope of its attacks over the next 3-6 months, intensifying pressure on already beleaguered Pakistani security forces.* The TTP primarily conducts operations in Khyber Pakhtunkhwa (KP) and has demonstrated growing adaptability, enabled by its ability to retreat into Afghanistan. These factors complicate Pakistani operations and heighten tensions with the Afghan Taliban, whom Pakistan accuses of harboring TTP members. In March 2026, the TTP announced Operation Khyber, expanding attacks beyond its strongholds.<sup>i</sup>

- On March 26, 2026, the TTP launched 17 coordinated attacks across South Waziristan, the Peshawar periphery (Frontier Regions), Bajaur, Mohmand, Bannu, and Khyber. This multi-district campaign demonstrates sustained pressure across the former Federally Administered Tribal Areas (FATA) under Operation Khyber. The TTP used sniper attacks, ambushes, grenade launcher strikes, and follow-up engagements, resulting in at least seven confirmed security-force casualties, four killed and three injured. The actual number is likely higher due to attacks with unconfirmed casualties, according to a source with firsthand access and a reliable track record of reporting.<sup>ii</sup>
- In 2025, the TTP launched the *Al-Khandaq* operation, aiming to expand beyond traditional strongholds and into Chitral, Pishin, and southern Punjab.<sup>iii</sup> TTP attacks in 2025 increased with over 448 recorded attacks. Many involved coordinated groups using vehicle-borne improvised explosive devices and teams of suicide attackers on foot, according to multiple sources with secondhand access and reliable track records of reporting.<sup>iv</sup>
- Pakistan's strikes in eastern Afghanistan on 22 February 2026, killed approximately 70-80 TTP-linked militants responsible for attacks in Pakistan, according to multiple sources with track records of reliable reporting on the issue.<sup>v</sup>



*Security Under Siege: The Dual Insurgency Threat in Pakistan*



## South and Central Asia: Military and Cyber

*We assess with moderate confidence that the Baloch Liberation Army (BLA) will carry out more sophisticated, economically disruptive attacks over the next 3–6 months, particularly targeting infrastructure, security forces, and mining districts in Balochistan.* Pakistan is unlikely to defeat the insurgency because its counterterrorism strategy focuses on short-term kinetic responses rather than long-term sustainable security. Although Pakistan can prevent the BLA from holding territory and restore order after major incidents, the group continues to launch multi-site raids, convoy attacks, and infrastructure disruptions with impunity. Pakistan's military is overstretched from confronting complex insurgencies in Balochistan and KP as well as tensions with both of its neighbors, India and Afghanistan. Coupled with the TTP's insurgency, BLA violence further destabilizes Pakistan, threatens foreign personnel and infrastructure, and jeopardizes long-term foreign investment in Balochistan's critical mineral supply chains.<sup>vii</sup>

- On 31 January 2026, BLA fighters launched a multi-site operation that resulted in a 40-hour gunfight with the Pakistani security forces. The clashes led to the deaths of 216 militants, 22 security personnel, and 36 civilians, according to multiple sources with reliable track records of reporting, and second-hand access to the information.<sup>viii</sup>
- Barrick Mining, a Canadian company, is postponing its Balochistan project due to security concerns. Barrick estimates the Reko Diq project in Balochistan alone would produce up to 400,000 tons of copper and 500,000 ounces of gold annually once both phases are complete, according to multiple sources with second-hand access to the information.<sup>ix</sup>
- On 11 March 2025, the BLA attacked a passenger train in Kachhi district, Balochistan, taking 214 hostages, including Pakistani military and security personnel. In retaliation the Pakistan Army, Air Force, Frontier Corps (FC), and Special Service Group conducted a joint operation, killing 33 militants. Four FC personnel and 21 hostages also died in the operation, according to the same source.<sup>x</sup>

### Source Summary Statement

Our assessment relies on substantial evidence indicating that Pakistan will continue to suffer its most severe, sophisticated, and persistent damage from internal militant activity stemming from Tehrik-e-Taliban Pakistan and the Baloch Liberation Army, rather than external powers. Although disseminating this evidence is complicated by the military's reluctance to accurately record and disclose cross-border militant activities and threats, including capture and casualty information, the available data still supports a clear evaluation of the trajectory of this low-intensity conflict. These variables compliment and justify a higher confidence level in the first judgement and a medium confidence level in the second.

### Notes

<sup>i</sup> European Union Agency for Asylum | [https://www.euaa.europa.eu/sites/default/files/publications/2026-03/2026\\_03\\_EUAA\\_COI\\_Query\\_Response\\_Q12\\_Pakistan\\_Security\\_Situation\\_in\\_Khyber\\_District.pdf](https://www.euaa.europa.eu/sites/default/files/publications/2026-03/2026_03_EUAA_COI_Query_Response_Q12_Pakistan_Security_Situation_in_Khyber_District.pdf) | Country of Origin Information Query: Pakistan, Security Situation in Khyber District, Q12-2026 | 13 March 2026.

<sup>ii</sup> Terrorism Research Analysis Consortium | <https://trackingterrorism-org.eu1.proxy.openathens.net/chat/ttp-claims-17-attack-on-27-march-2026/> | TRAC Incident Report: Tehreek-e-Taliban Pakistan (TTP) Claims 17 Attacks (Under 'Operation Khyber') in North & South Waziristan, Bajaur, Khyber, Peshawar, Bannu, Karak Province, in Pakistan | 27 March 2026

<sup>iii</sup> Arab News | <https://www.arabnews.com/node/2599265> | Pakistani Taliban's resurrected spring offensive shows its growing strength | 2 May 2025

<sup>iv</sup> ACLED Data | <https://acleddata.com/report/pakistan-battles-rising-militancy-risks-spreading-beyond-frontiers> | Pakistan battles rising militancy that risks spreading beyond the frontiers | 11 December 2025

<sup>v</sup> Associated Press | <https://apnews.com/article/pakistan-afghanistan-militants-strikes-border-b849ad97b462de8067d1b7f20ffd9f9e?> | Pakistan claims to have killed at least 70 militants in strikes along the Afghan border | 22 February 2026; CNN | <https://www.cnn.com/2026/02/27/asia/afghanistan-pakistan-strikes-what-we-know-intl-hnk> | Pakistan's defense minister says latest clashes with Taliban mean 'open war.' What's happening? | 27 February 2026



## South and Central Asia: Military and Cyber

---

<sup>vi</sup> AI Acknowledgement: The author acknowledges the use of generative AI (Notebook LM) in creating the graphic included in this paper. All substantive interpretation, fact-checking, and final edits were completed by the author.

<sup>vii</sup> Associated Press | <https://apnews.com/article/pakistan-militant-attacks-baloch-insurgents-killed-balochistan-11cebda7cfe8b4c7687b9236ae4a3> | Pakistani forces kill 177 Baloch militants in 48 hours, the highest toll in decades | 2 February 2026; Combatting terrorism Center at West Point | <https://ctc.westpoint.edu/the-baloch-insurgency-in-pakistan-evolution-tactics-and-regional-security-implications/> | The Baloch Insurgency in Pakistan: Evolution, Tactics, and Regional Security Implications | April 2025; International Institute for Strategic Studies | <https://www.iiss.org/online-analysis/online-analysis/2019/09/sasia-pakistan-protects-chinese-investments/> | Pakistan refocuses on counter-terrorism to protect China's investments | 19 September 2019

<sup>viii</sup> Janes | [https://customer.janes.com/display/BSP\\_85455-JTIC](https://customer.janes.com/display/BSP_85455-JTIC) | BLA attack on Passenger train and hostage taking in Pakistan's Balochistan highlight group's capability to conduct complex militant attacks | 14 March 2025; Al Jazeera | <https://www.aljazeera.com/features/2026/2/1/everyone-here-is-corrupt-what-fuels-the-balochistan-separatist-violence> | 'Army alone can't neutralise grievances': What fuels Balochistan violence | 1 February 2026

<sup>ix</sup> Reuters | <https://www.reuters.com/world/asia-pacific/barrick-delay-pakistan-copper-gold-project-amid-middle-east-conflict-ft-reports-2026-03-26/> | Barrick delays Reko Diq project in Pakistan amid mounting security concerns | 26 March 2026; Access World News | [https://infoweb-newsbank-com.eu1.proxy.openathens.net/apps/news/document-view?p=AWNB&t=&sort=YMD\\_date%3AD&hide\\_duplicates=2&fld-base-0=alltext&maxresults=60&val-base-0=Reko%20Diq%20&docref=news/1A718CF1230D6768](https://infoweb-newsbank-com.eu1.proxy.openathens.net/apps/news/document-view?p=AWNB&t=&sort=YMD_date%3AD&hide_duplicates=2&fld-base-0=alltext&maxresults=60&val-base-0=Reko%20Diq%20&docref=news/1A718CF1230D6768) | Barrick delays Pakistan mega mine as Iran conflict rattles region | 27 March 2026

<sup>x</sup> Janes | [https://customer.janes.com/display/BSP\\_85455-JTIC](https://customer.janes.com/display/BSP_85455-JTIC) | BLA attack on Passenger train and hostage taking in Pakistan's Balochistan highlight group's capability to conduct complex militant attacks | 14 March 2025



## Taliban-Pakistan Fighting Likely to Intensify in Next 3-6 Months

Author: Elizabeth Wiederholt

Division Chief: Samuel Goodpaster & Team Lead: Maximilian Mooradian

Editor: William Parnell

Graphic Designer: Siya Gupta

---

*We assess it is unlikely that the Taliban will stop supporting the Tehrik-e-Taliban Pakistan (TTP) in the next 3-6 months, which will stymie Taliban-Pakistani peace talks. The Taliban government is almost certainly providing a safe haven for the TTP despite its denials.*<sup>i</sup> Many rank and file Taliban reportedly believe they have an ideological obligation to the TTP based on their shared Deobandi faith.<sup>ii</sup> For its part, Islamabad is unlikely to accept Taliban denials or assurances.<sup>iii</sup> Because the Taliban has an ideological drive to maintain support and will derive few diplomatic benefits from withdrawing it, the Taliban is likely to continue backing the TTP despite Pakistani pressure.

- Negotiations in October 2025 resulted in a ceasefire and a Taliban pledge not to support any groups targeting Pakistan, according to a source with secondhand access and a reliable record of reporting.<sup>iv</sup> However, the UN Analytical Support and Sanctions Monitoring Team, as of 26 February 2026, found that the Afghan Taliban afforded the TTP more freedom and support than it had during the UN's previous reporting cycle, which ended in July 2025.<sup>v</sup>
- Afghan Taliban leadership is concerned that halting support for the TTP would cause internal Taliban divisions and prompt TTP members to join the Islamic State in Khorasan Province, a Taliban rival. The Taliban's refusal to turn over al-Qaida members despite threats of a US invasion also demonstrates their historical reluctance to betray terrorist allies, according to a credible source with secondhand access that has been publishing on the region for nineteen years.<sup>vi</sup>

*We assess that Pakistan will likely intensify its military operations against the TTP presence in Afghanistan in the next 3-6 months in an attempt to reduce the TTP's capacity to conduct cross-border strikes in Pakistan.* TTP attacks on Pakistan have increased since the Taliban takeover of Afghanistan each year, from 187 in 2022 to 595 in 2025.<sup>vii</sup> Past negotiations between the TTP and Pakistan have been unsuccessful because Islamabad rejects TTP demands for control over the Federally Administered Tribal Areas.<sup>viii</sup> Pakistan's recent intensifying rhetoric and air strikes demonstrate that it is willing to violate to strike in Afghanistan to reduce the TTP's operational capabilities.<sup>ix</sup>

- Between 26 February and 2 March, Taliban-Pakistan border clashes caused 185 civilian casualties within Afghanistan, according to a source with firsthand access and a reliable reporting record.<sup>x</sup> Pakistan's Defense Minister Khawaja Mohammad Asif characterized the fighting as an "open war."<sup>xi</sup>
- Pakistan's "Operation Ghazb-lil-Haq" offensive targeted TTP infrastructure and Afghan military targets that Pakistani officials claim have been used to target Pakistan, according to a source with firsthand access who may intend to influence as well as inform.<sup>xii</sup>
- Both sides agreed to pause hostilities for Eid al-Fitr, barring any attacks from the other side, according to sources from the Pakistani and Taliban governments.<sup>xiii</sup>
- Following the temporary ceasefire, the two exchanged heavy fire along the Durand Line, according to a source with second-hand access and a reliable record of reporting.<sup>xiv</sup>



# South and Central Asia: Political and Economic



Graphic depicts timeline of escalation between Afghanistan and Pakistan.<sup>xxi</sup>

## Source Summary Statement

We assess with a high level of confidence that the source material used in this analytic product is reliable and credible. The sources used in this analysis are generally sources with secondhand access, primarily well-respected news outlets or policy institutes. Our analysis also relies on some official government statements or reporting on government statements posted to X (formerly Twitter), which likely intend to influence as well as inform. This body of evidence takes into account expert opinions, current events, and government statements. The situation is rapidly updating, and all research is current as of 1 April 2026.



# South and Central Asia: Political and Economic

## Notes

- <sup>i</sup> Thirty-seventh report of the Analytical Support and Sanctions Monitoring Team submitted pursuant to resolution 2734 (2024) concerning ISIL (Da'esh), Al-Qaida and associated individuals and entities | 04 February 2026 | p. 17 | States that the Taliban government has offered support to the TTP.; Lindsay Maizland | <https://www.cfr.org/backgrounders/taliban-afghanistan> | The Taliban in Afghanistan | 27 February 2026 | Reports that the Taliban denies Pakistani claims that it supports the TTP.
- <sup>ii</sup> Abdul Sayed and Tore Hamming | <https://ctc.westpoint.edu/the-tehrik-i-taliban-pakistan-after-the-talibans-afghanistan-takeover/> | The Tehrik-i-Taliban Pakistan After the Taliban's Afghanistan Takeover | May 2023 | Discusses reasons that Taliban fighters feel obligated to support the TTP.
- <sup>iii</sup> Munir Ahmed | <https://apnews.com/article/pakistan-president-afghanistan-india-backing-militants-911-abbf3e032d95932a672c588d3eec7549> | Pakistan says Afghanistan has created conditions 'similar to or worse than' pre-9/11 attacks | 09 February 2026 | Reports on continuing accusations that the Taliban supports the TTP from the Pakistani government.
- <sup>iv</sup> Rachel Hagan | <https://www.bbc.com/news/articles/cze6nzpl74do> | Taliban and Pakistan agree to ceasefire after days of deadly clashes | 19 October 2025.
- <sup>v</sup> UN Analytical Support and Sanctions Monitoring Team | <https://docs.un.org/en/S/2025/482> | Thirty-sixth report of the Analytical Support and Sanctions Monitoring Team submitted pursuant to resolution 2734 (2024) concerning ISIL (Da'esh), Al-Qaida and associated individuals and entities | 24 July 2025; UN Analytical Support and Sanctions Monitoring Team | <https://docs.un.org/en/S/2026/44> | Thirty-seventh report of the Analytical Support and Sanctions Monitoring Team submitted pursuant to resolution 2734 (2024) concerning ISIL (Da'esh), Al-Qaida and associated individuals and entities | 04 February 2026.
- <sup>vi</sup> Michael Kugelman | <https://www.atlanticcouncil.org/dispatches/while-the-iran-conflict-continues-the-afghanistan-pakistan-crisis-is-only-getting-worse/> | While the Iran conflict continues, the Afghanistan-Pakistan crisis is only getting worse | 05 March 2026.
- <sup>vii</sup> Pearl Pandya | <https://acleddata.com/report/battle-borderlands-tehreek-i-taliban-pakistan-challenges-states-control> | The battle for the borderlands: The Tehreek-i-Taliban Pakistan challenges the state's control | 06 October 2025 Provides TTP attack data for 2022.; Institute for Economics & Peace | <https://www.visionofhumanity.org/wp-content/uploads/2026/03/Global-Terrorism-Index-2026-Report.pdf> | Global Terrorism Index 2026 | March 2026 | p. 17 | Provides TTP attack data for 2025.
- <sup>viii</sup> Abdul Sayed and Tore Hamming | <https://ctc.westpoint.edu/the-tehrik-i-taliban-pakistan-after-the-talibans-afghanistan-takeover/> | The Tehrik-i-Taliban Pakistan After the Taliban's Afghanistan Takeover | May 2023 | Provides key TTP demands of Pakistani government.
- <sup>ix</sup> Munir Ahmed, Elena Becatoros, and E. Eduardo Castillo | <https://apnews.com/article/pakistan-afghanistan-fighting-background-a23c22bd981170679735bd295220bb49> | What to know about the latest fighting between Afghanistan and Pakistan | 27 February 2026 | Discusses the rhetoric and fighting between Afghanistan and Pakistan.
- <sup>x</sup> United Nations Assistance Mission in Afghanistan | <https://unama.unmissions.org/en/press-releases/update-civilian-casualties-afghanistan> | Update on Civilian Casualties in Afghanistan | 06 March 2026.
- <sup>xi</sup> @KhawajaMASif | <https://x.com/KhawajaMASif/status/2027146237275672713> | After the withdrawal of NATO forces... | 26 February 2026.



# South and Central Asia: Political and Economic

---

## Notes

<sup>xii</sup> @TararAttauallah | <https://x.com/TararAttauallah/status/2034276694656438475> | Operation Ghazb-lil-Haq | 18 March 2026.

<sup>xiii</sup> @TararAttauallah | <https://x.com/TararAttauallah/status/2034269962894823924> | TEMPORARY PAUSE IN OPERATION GHAZAB LIL HAQ | 18 March 2026; @Zabehulah\_M33 | [https://x.com/Zabehulah\\_M33/status/2034296138720035069?s=20](https://x.com/Zabehulah_M33/status/2034296138720035069?s=20) | Temporary Suspension of "Redd al-Zolm" Defensive Operations | 18 March 2026.

<sup>xiv</sup> Mushtaq Ali and Sayed Hassib | <https://www.reuters.com/world/china/pakistan-afghanistan-open-fresh-talks-china-end-conflict-say-sources-2026-04-01/> | Pakistan, Afghanistan open fresh talks in China to end conflict, say sources | 01 April 2026.

<sup>xv</sup> Clara Fong | <https://www.cfr.org/articles/why-are-the-afghan-taliban-and-pakistan-in-an-open-war> | Why Are the Afghan Taliban and Pakistan in an 'Open War'? | 18 March 2026 | Provides a summary of recent Taliban-Pakistani relations.



## Al-Qaida Central Likely Leveraging Afghanistan Haven to Rebuild Network

Author: Laura Bucci

Division Chief: Samuel Goodpaster & Team Lead: Natalie Tarby

Editor: William Parnell

*We assess al-Qaida (AQ) is encouraging an anti-U.S. "Jihad" in response to the ongoing war with Iran, which will likely garner greater attention to AQ propaganda in the jihadist media landscape in the next 6-12 months.* AQ's messaging glorifies armed Jihad and focuses on Western action in Muslim-majority regions as an existential threat to Islamic identity and injustice against Muslims globally, with an emphasis on Afghanistan.<sup>i</sup> AQ portrays Western interventions as part of a larger struggle between Western powers and Muslim populations, likely to reinforce grievances and gain support from sympathizers.

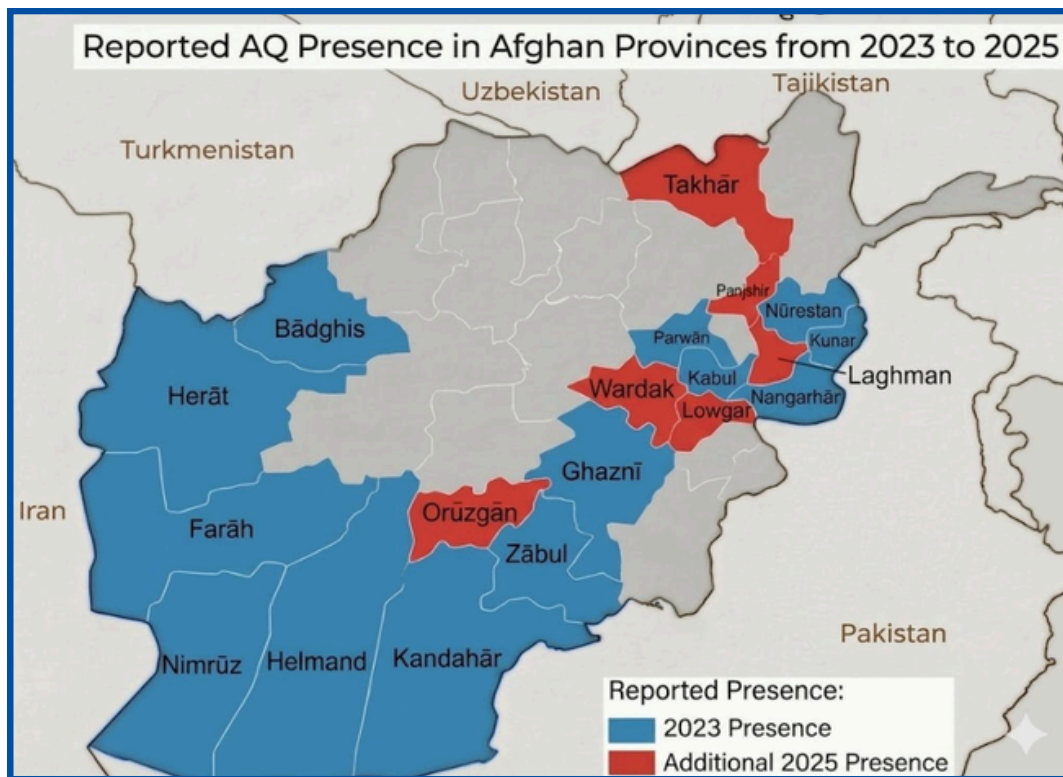
- On 4 February 2026, as-Sahab—the media wing for al-Qaida Central (AQC)—released a statement claiming that U.S. action in Iran is a renewed “Zionist-Crusader” against Islam. The statement warns that Afghanistan and other Muslim states are next, calling for all Muslims to mobilize for Jihad against U.S. military bases, assets, and personnel, according to a credible source with third-hand access to the information and a reliable record of on-the-ground reporting.<sup>ii</sup>
- On 11 September 2025, as-Sahab released the sixth video in the “Wind of Paradise” series to commemorate the 9/11 anniversary after the series’ 14-year hiatus. The 2025 video marked the series’ first release since September 2011 and profiled senior AQC operative Abu Ubayda al-Misri, who led military operations in Afghanistan and Pakistan, and helped carry out AQ’s 2005 attacks against the West, according to two sources with second-hand access to the information and reliable reporting records.<sup>iii</sup>
- A February 2026 report indicated that AQ in South and Central Asia is seeking to conduct “spectacular”—large-scale rather than low-sophistication—attacks to amplify the group’s global media coverage and recognition, according to a highly credible source with second-hand access to the information and a reliable reporting record.<sup>iv</sup>

*We assess that AQ is likely expanding its presence in Afghanistan in order to reestablish its organizational structure, which will increase the group's capabilities to conduct external operations in the next 6-12 months.* AQC referenced the growth of its camps in Afghanistan as a strategic U.S. military loss.<sup>v</sup> Indicators of AQ expanding its presence in Afghan provinces include personnel, training camps, weapons stockpiles, madrasas, safe houses, media infrastructure, and al-Qaida in the Indian Subcontinent training facilities.<sup>vi</sup> Despite AQ’s increased presence in Afghan provinces since 2023, we lack information on AQ’s force size and operational density in each province.

- AQ personnel and infrastructure presence expanded from 13 Afghan provinces in 2023 to 19 provinces by 2025. This reflects approximately 46 percent geographic growth between 2023 and 2025, with an AQ presence spanning 55 percent of Afghan provinces by 2025, according to aggregated data from a body of highly credible sources with second-hand access to the information and reliable reporting records.<sup>vii</sup>
- A February 2026 report indicated that AQ in South and Central Asia is seeking to expand external operations, according to a highly credible source with second-hand access to the information and a reliable reporting record.<sup>viii</sup>
- On 5 September 2025, a report on a news Telegram channel post indicated that the Afghan Taliban transferred a former training base in the Lowgar province—a new province from 2023—to the Tehrik-e Taliban Pakistan (TTP), where AQ members train in building and using combat drones, placing AQ and TTP militants at the same Afghan Taliban-transferred facility. The channel also reported that the Afghan Taliban handed over bases in Panjshir—another new province beyond 2023 presence—to AQ, according to a source with third-hand access to the information who intended to influence as well as inform.<sup>ix</sup>



## South and Central Asia: Transnational Threats



This map details the 13 Afghan provinces with a reported AQ presence in 2023 (blue) and the additional provinces with a reported AQ presence by 2025 (red), totaling 19 provinces by 2025—an increase from 2023.<sup>x</sup>

*We assess the Afghan Taliban is likely institutionalizing AQ's presence in Afghanistan, which will aid in AQ's ability to rebuild its network in the next 12-24 months.* AQ previously operated in Afghanistan under Taliban protection from 1996 to 2001, utilizing the country as a base to freely recruit, train, and conduct external operations.<sup>xi</sup> AQ has repeatedly pledged bay'ah—a sacred pledge of loyalty—to the Afghan Taliban.<sup>xii</sup> The Afghan Taliban-AQ relationship is “mutually beneficial,” with AQ providing training in exchange for the Taliban's haven.<sup>xiii</sup>

- A February 2026 report indicated AQ's de facto leader—Saif-al-Adl—sent a message to the Afghan Taliban leader—Mullah Hibatullah Akhundzada—requesting a haven to temporarily relocate AQ's headquarters to Afghanistan if pressure in Iran forced the group's leadership to move, according to a credible source with third-hand access to the information and a reliable record of reporting on Afghanistan.<sup>xiv</sup>
- AQ is establishing madrasas in Afghanistan—including in Laghman, Kunar, Nangahar, Nuristan, and Parwan provinces—that promote extremist propaganda and glorify Jihad and AQ ideology, according to two reliable and credible sources with second and third-hand access to the information and a history of reporting on AQ in Afghanistan.<sup>xv</sup>
- The Afghan Taliban built residential settlements and bases in the Ghanzi province with large religious schools, including dormitories intended for AQ and TTP members, calling on neighboring provinces—Zabul and Paktika—to send their children to these centers, according to a credible source with second and third-hand access to the information and a reliable record of reporting on Afghanistan.<sup>xvi</sup>
- On 12 December 2025, the Afghan Taliban are building an “important center” for AQ, including a school in the Ghor Province, which the Afghan Taliban is transferring equipment to, according to a SOCMINT source with second-hand access to the information and an unverified reporting track record.<sup>xvii</sup>



# South and Central Asia: Transnational Threats

## Source Summary Statement

We assess this body of reporting with moderate confidence, based on second and third-hand reporting. We used sources who intended to influence as well as inform solely to access and translate otherwise inaccessible primary materials; however, to increase confidence, we cross-checked the translation by uploading source-provided images of the original media into Google Translate and DeepL. We used dated sources in select instances due to reporting gaps on AQC in Afghanistan, driven by the group's contested presence and low visibility, compounded by limited open-source intelligence access and Afghanistan's broader media vacuum. We drew from credible reports from the United Nations. The percentages derived from UN reports required the analyst's calculations. First-hand access to primary sources would increase overall confidence; however, we assess that this body of reporting is sufficient to support our judgments.

## Notes

- <sup>i</sup> Rohan Gunaratna | <https://www.hudson.org/national-security-defense/al-qaeda-s-ideology#:~:text=This%20is%20because%20al%2DQaeda's,United%20States%20and%20its%20allies.> | Al-Qaeda's Ideology | 19 May 2005.
- <sup>ii</sup> Terrorism Research and Analysis Consortium | <https://trackingterrorism-org.eu1.proxy.openathens.net/chatting/al-qaeda-central-command-aqc-consider-o-people-of-insight/> | (Statement) as-Sahab Media (al-Qaeda Central Command/AQC): "Consider, O People of Insight" | 4 February 2026.
- <sup>iii</sup> Terrorism Research and Analysis Consortium | <https://trackingterrorism-org.eu1.proxy.openathens.net/chatting/al-qaeda-central-releases-25th-anniversary-video-of-911/> | TRAC Insight: Al-Qaeda Command Media Wing 'as-Sahab' Releases a New Video Titled "Wind of Paradise," Marking the 24th Anniversary of the 9/11 Attacks | 11 September 2025; Thomas Joscelyn | <https://www.longwarjournal.org/archives/2021/09/al-qaeda-affiliated-media-group-stresses-importance-of-idea-development-in-9-11-video.php> | Al-Qaeda Affiliated Media Group Stresses Importance of 'Idea Development' in 9/11 Video | 18 September 2021.
- <sup>iv</sup> United Nations Security Council | <https://docs.un.org/en/S/2026/44> | Thirty-Seventh Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 4 February 2026.
- <sup>v</sup> Terrorism Research and Analysis Consortium | <https://trackingterrorism-org.eu1.proxy.openathens.net/chatting/aqc-series-this-is-gaza-a-war-of-existence-not-a-war-of-borders-trac/> | (PDF) as-Sahab media (al-Qaeda Central/AQC) Releases the Last Issue of the Pamphlet Series 'This is Gaza: A War of Existence, Not a War of Borders' | 17 July 2024 ; Terrorism Research and Analysis Consortium | <https://trackingterrorism-org.eu1.proxy.openathens.net/chatting/al-malahim-electronic-army-aqc-releases-letter-trac/> | (PDF) Al-Malahim Electronic Army (al-Qaeda Central Command/AQC) Releases an Open Letter Titled, 'A Message We Hope Every American Citizen Will Read' | 30 July 2024.
- <sup>vi</sup> United Nations Security Council | <https://docs.un.org/en/S/2023/370> | Fourteenth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) | 1 June 2023 | Used as baseline reporting of AQ presence to show percent increase from 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2024/499> | Fifteenth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) | 8 July 2024 | Used to aggregate reported AQ presence data between 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2024/92> | Thirty-Third Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 29 January 2024 | Used to aggregate reported AQ presence data between 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2025/71> | Thirty-Fifth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 6 February 2025 | Used to aggregate reported AQ presence data between 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2026/44> | Thirty-Seventh Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 4 February 2026.



# South and Central Asia: Transnational Threats

---

## Notes

vii United Nations Security Council | <https://docs.un.org/en/S/2023/370> | Fourteenth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) | 1 June 2023 | Used as baseline reporting of AQ presence to show percent increase from 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2024/499> | Fifteenth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) | 8 July 2024 | Used to aggregate reported AQ presence data between 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2024/92> | Thirty-Third Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 29 January 2024 | Used to aggregate reported AQ presence data between 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2025/71> | Thirty-Fifth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 6 February 2025 | Used to aggregate reported AQ presence data between 2023 to 2025 ; Terrorism Research and Analysis Consortium | <https://trackingterrorism-org.eu1.proxy.openathens.net/chat/distribution-of-jihadist-militant-camps-across-afghanistan/> | (Map) Distribution of Suspected Jihadist Militant Camps and Facilitation Hubs across Afghanistan | 7 September 2025; Terrorism Research and Analysis Consortium | <https://trackingterrorism-org.eu1.proxy.openathens.net/chat/hamza-bin-laden-alive-al-qaeda-group-afghanistan-trac/> | TRAC Incident Report: Osama bin Laden's Presumed Dead Son, Hamza bin Laden, Suspected to Be Alive and Running al-Qaeda From Afghanistan | 13 September 2024

viii United Nations Security Council | <https://docs.un.org/en/S/2026/44> | Thirty-Seventh Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 4 February 2026.

ix Middle East Media Research Institute | <https://www.memri.org/jttm/telegram-channel-afghan-taliban-handed-over-former-bases-al-qaeda-and-tehreek-e-taliban> | Telegram Channel Afghan Taliban Handed Over Former Bases to Al-Qaeda and Tehreek-e-Taliban Pakistan (TTP) To Build Copies of Turkish Drones, Use 'An Airfield With a 2,300-Meter Runway' | 30 September 2025 | Low credibility, right wing bias source to access otherwise inaccessible information, verified using Google Translate.

x United Nations Security Council | <https://docs.un.org/en/S/2023/370> | Fourteenth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) | 1 June 2023 | Used as baseline reporting of AQ presence in 2023 to produce graphic ; This graphic was generated with the assistance of Gemini3, a generative AI tool hosted by Google. We used Gemini to assist in generating the graphic on Reported AQ Presence in Afghan Provinces from 2023 to 2025. The author has reviewed all AI-generated content to ensure accuracy ; Wikimedia Commons | [https://commons.wikimedia.org/wiki/File:Afghanistan\\_provinces\\_named.png](https://commons.wikimedia.org/wiki/File:Afghanistan_provinces_named.png) | Afghanistan Provinces Named | Used as a reference for provincial lines uploaded to Gemini3 to produce graphic ; United Nations Security Council | <https://docs.un.org/en/S/2023/370> | Fourteenth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) | 1 June 2023 | Used as baseline reporting of AQ presence to show percent increase from 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2023/370> | Fourteenth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) | 1 June 2023 | Used as baseline reporting of AQ presence to show percent increase from 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2024/499> | Fifteenth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) | 8 July 2024 | Used to aggregate reported AQ presence data between 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2024/92> | Thirty-Third Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 29 January 2024 | Used to aggregate reported AQ presence data between 2023 to 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2025/71> | Thirty-Fifth Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 6 February 2025 | Used to aggregate reported AQ presence data between 2023 to 2025

xi Office of the Director of National Intelligence Counterterrorism Guide | [https://www.dni.gov/nctc/groups/afghan\\_taliban.html#:~:text=In%20the%20years%20leading%20up,against%20al%20Qa'ida.](https://www.dni.gov/nctc/groups/afghan_taliban.html#:~:text=In%20the%20years%20leading%20up,against%20al%20Qa'ida.) | Afghan Taliban.



# South and Central Asia: Transnational Threats

---

## Notes

<sup>xii</sup> Afghanistan International | <https://www.afintl.com/en/202410090797> | Many Jihadi Groups in Asia & Africa Pledge Allegiance to Taliban Leader, Group Sources | 9 October 2024.

<sup>xiii</sup> United Nations Security Council | <https://docs.un.org/en/S/2020/53> | Twenty-fifth report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 20 January 2020.

<sup>xiv</sup> Afghanistan International | <https://www.iranintl.com/ar/202602048589> | Al-Qaeda is discussing moving its leadership headquarters from Iran to Afghanistan if the Khamenei regime falls | 4 February 2026.

<sup>xv</sup> Muhammad Qasem | [https://afghanistan.asia-news.com/en\\_GB/articles/cnmi\\_st/features/2025/10/01/feature-01#:~:text=Children's%20future%20under%20al-Qaeda's%20influence&text=By%20depriving%20children%20of%20proper,security%20priority%2C%22%20Ahadi%20said](https://afghanistan.asia-news.com/en_GB/articles/cnmi_st/features/2025/10/01/feature-01#:~:text=Children's%20future%20under%20al-Qaeda's%20influence&text=By%20depriving%20children%20of%20proper,security%20priority%2C%22%20Ahadi%20said) | Al-Qaeda Uses Unregulated Madrasas to Indoctrinate Children in Afghanistan, Pakistan | 1 October 2025 ; United Nations Security Council | <https://docs.un.org/en/S/2024/92> | Thirty-Third Report of the Analytical Support and Sanctions Monitoring Team Pursuant to Resolutions 1526 (2004) and 2253 (2015) | 29 January 2024 | Used to identify provinces with Madrasas.

<sup>xvi</sup> Amin Kawa | <https://8am.media/eng/the-taliban-host-terrorist-groups-four-new-settlements-built-for-al-qaeda-and-ttp/> | The Taliban Host Terrorist Groups: Four New Settlements Built for Al-Qaeda and TTP | 30 June 2024 | Dated reporting due to the limited intelligence access and low AQ visibility in Afghanistan ; Due to the media vacuum in Afghanistan and AQ's low visibility in the region, this is a 2024 report. However, we assess the information remains relevant because collection and reporting constraints in Afghanistan persist.

<sup>xvii</sup> Bazgshat News | <https://x.com/BZGTnews/status/1999895836587708490/photo/1>



## Balochistan Liberation Army (BLA) Attacks Likely to Increase Against Chinese Presence in Pakistan and Afghanistan

Author: Anne Marie Arthington

Division Chief: Samuel Goodpaster & Team Lead: Natalie Tarby

Editor: William Parnell

*We assess with moderate confidence that BLA attacks against Chinese targets in Balochistan will increase, which will further weaken Pakistan's already fragile economy and worsen its precarious security situation in the next 6 to 12 months.* The BLA attacks China-Pakistan Economic Corridor (CPEC) infrastructure to target China's presence in the province, which the group perceives as exploitation and dispossession of the Baloch people and resources.<sup>i</sup> On 25 August 2024, BLA launched phase one of Operation Herof—a two-part series of large, coordinated BLA attacks—in which the group conducted strikes across 12 cities.<sup>ii</sup> In the second phase, from 31 January to 5 February 2026, the group conducted strikes across 14 cities.<sup>iii</sup>

- Herof 2.0 demonstrated the BLA's expanded tactical capabilities, its ability to mobilize in large numbers, and its manpower to sustain an insurgency and a geographically diverse campaign, according to a body of sources with second and third-hand access to the information and a reliable history of reporting on the BLA.<sup>iv</sup>
- In January 2026, Pakistan saw a 28 percent increase in attacks from the month prior—largely due to the activity of Baloch militant groups, particularly the BLA, according to a source with third-hand access to the information and a reliable track record of reporting on Pakistan's security landscape.<sup>v</sup>
- The notoriety that the BLA received from Herof 2.0 will boost the group's morale, as significant media coverage often increases the risk of further terror attacks, according to a body of sources with third-hand access to the information and reliable track records of reporting on the BLA and the psychology of terrorist groups.<sup>vi</sup>

The Evolution of BLA Capability in Operation Herof		
Capability dimension	Herof 1.0 (Aug 2024)	Herof 2.0 (Jan-Feb 2026)
Duration	Single day (Aug 25)	6 days (Jan 31-Feb 5)
Geographic scope	12 cities across the province	14 cities across the province
Target type	Rail and road networks (CPEC infrastructure)	CPEC infrastructure, urban centers, security forces
Operational style	Remote insurgency	Urban warfare
Scale of attacks	Limited, focused	76 claimed attacks
Casualty claims	130 security forces; 6 BLA fighters	362 security forces; 93 BLA fighters
Tactical sophistication	Conventional sabotage	Expanded — large scale mobilization
Propaganda value	Moderate	High — significant media notoriety
Recruitment signal	Unknown	Demonstrated ability to sustain an insurgency

*This chart details the shifts between the first and second phases of BLA's Operation Herof. It shows how, over the course of two years, the BLA's attack and recruitment campaigns have evolved to be more effective and long-lasting.<sup>vii</sup>*



# South and Central Asia: Transnational Threats

*We assess with moderate confidence that, despite increased BLA attacks on Chinese infrastructure, China will not decrease investment in Pakistan within the next 6 to 12 months, due to Pakistan's efforts to increase security measures.* CPEC—present in Pakistan since 2015—provides China access to the Arabian Sea, namely through Gwadar Port in Balochistan. The \$62 billion project established deep economic ties between China and Pakistan.<sup>viii</sup> Previously in 2017—in response to targeted attacks against CPEC infrastructure—Islamabad created a special security division of roughly 15,000 armed forces.<sup>ix</sup>

- In January 2026, Islamabad and Beijing announced a new special security unit, joint police training programs, and a rapid response system to protect Chinese citizens in Pakistan, according to three sources with second-hand access to the information and reliable track records of reporting on Pakistan and China.<sup>x</sup>
- On 5 February 2026, Pakistan's military concluded a weeklong security operation in response to Herof 2.0 that killed 216 militants, according to two sources with first and third-hand access to the information and reliable track records of reporting on Pakistani military affairs.<sup>xi</sup>
- On 7 January 2026, China's Interior Minister Wang Zhao Hong expressed satisfaction with the recent Pakistani measures taken to increase protection for Chinese nationals and projects, according to a source with first-hand access to the information.<sup>xii</sup>
- CPEC 2.0 establishes 37 new special economic zones, signaling China's further financial investment in Pakistan's manufacturing base and supply chains, according to a body of sources with third-hand access to the information and reliable track records of reporting on China-Pakistan cooperation.<sup>xiii</sup>

## Source Summary Statement

We assess with moderate confidence that this body of reporting is both credible and reliable, and supports the judgments drawn in the analysis. While the body of the reporting is primarily second-hand, there are some levels of first-hand access from government websites and social media platforms. This reporting pulls primarily from well-established news sources and some American think-tanks. Some of the sources, such as the Janes report and Manohar Parrikar Institute for Defense Studies and Analyses, have analysts who are stationed based in India and thus may have bias against Pakistan. We acknowledge that there is an intelligence gap regarding what level of security concerns would change Beijing's relationship with Islamabad or its level of investment in Balochistan. Sources with firsthand access to the BLA, specifically social media or public statements from the BLA, would increase our confidence in the group's intent.

## Notes

<sup>i</sup> Modern Diplomacy | <https://moderndiplomacy.eu/2026/02/01/who-is-the-bla-the-terrorist-group-targeting-pakistan-in-balochistan/> | Who is the BLA? The Terrorist Group Targeting Pakistan in Balochistan | 01 February 2026 ; Salman, Muneeb & Usmani, Saeeda. | <https://blogs.lse.ac.uk/southasia/2025/05/19/balochistan-cpec-anti-china-sentiment-and-the-way-ahead/> | Balochistan: CPEC, Anti-China Sentiment and the Way Ahead | 19 May 2025 ; Oxenvad, Ian | <https://www.gisreportsonline.com/r/china-balochistan/> | China's Success and Eurasia's Future Lie in Balochistan | 07 October 2025

<sup>ii</sup> Gayakwad, Shivani & Sarkar, Saurav | <https://customerportal.janes.com/entity/news/2TSWLLzUIwKPsUDDrCV?> | Co-Ordinated Baloch Separatist Militant Attacks in Pakistan's Balochistan Province Indicate a Shift in Tactics and Increased Militant Threat | 02 September 2024 ; Gayakwad, Shivani & Sarkar, Saurav | <https://customerportal.janes.com/entity/news/2TSWLLzUIwKPsUDDrCV?> | Co-Ordinated Baloch Separatist Militant Attacks in Pakistan's Balochistan Province Indicate a Shift in Tactics and Increased Militant Threat | 02 September 2024

<sup>iii</sup> Durand Dispatch | [www.duranddispatch.com](http://www.duranddispatch.com) | Strategic Messaging, Baloch Militant Organizations | March 2026 | Volume 1, Issue 2, p12 |



# South and Central Asia: Transnational Threats

## Notes

<sup>iv</sup> Ali, Ammarah | <https://cscr.pk/explore/themes/defense-security/how-operation-herof-2-0-was-designed-to-communicate/> | How Operation Herof 2.0 Was Designed to Communicate | 23 February 2026 ; Mumtaz, Shomalia | <https://www.picss.net/latest-reports/from-herof-2-0-to-strategic-partnerships-pakistans-security-and-diplomatic-crossroads/> | From Herof 2.0 to Strategic Partnerships: Pakistan's Security and Diplomatic Crossroads | 8 February 2026 ; Musab, Muhammad | <https://www.eurasiareview.com/10022026-operation-herof-2-0-pakistans-strategic-resilience-in-balochistan-oped/> | Operation Herof 2.0: Pakistan's Strategic Resilience in Balochistan – OpEd | 10 February 2026 ; Sarkar, Saurav | [https://customer.janes.com/Janes/Display/BSP\\_99066-JTIC](https://customer.janes.com/Janes/Display/BSP_99066-JTIC) | Multiple Co-Ordinated BLA Attacks in Pakistan's Balochistan Province Highlight the Group's Increased Capability to Organize Large-Scale Attack Campaigns | 06 February 2026

<sup>v</sup> Mumtaz, Shomalia | <https://www.picss.net/latest-reports/january-2026-the-balochistan-surge-and-pakistans-expanding-counterterrorism-front/#:~:text=February%20%2C%202026-,January%202026:%20The%20Balochistan%20Surge%20and%20Pakistan's%20Expanding%20Counterterrorism%20Front,final%20days%20of%20the%20month> | January 2026: The Balochistan Surge and Pakistan's Expanding Counterterrorism Front | 6 February 2026

<sup>vi</sup> Sarkar, Saurav | [https://customer.janes.com/Janes/Display/BSP\\_99066-JTIC](https://customer.janes.com/Janes/Display/BSP_99066-JTIC) | Multiple Co-Ordinated BLA Attacks in Pakistan's Balochistan Province Highlight the Group's Increased Capability to Organize Large-Scale Attack Campaigns | 06 February 2026 ; White, Jessica | [https://static.rusi.org/terrorism\\_and\\_the\\_mass\\_media\\_final\\_web\\_version.pdf](https://static.rusi.org/terrorism_and_the_mass_media_final_web_version.pdf) | Terrorism and the Mass Media | May 2020 ; Schmid, Alex | <https://icct.nl/sites/default/files/2023-01/Chapter-18-Handbook.pdf> | Prevention of (Ab-) Use of Mass Media by Terrorists (and vice versa) | June 2021 ; Schmid, Alex | [https://icct.nl/sites/default/files/2023-03/Schmidt%20-%20Defining%20Terrorism\\_1.pdf](https://icct.nl/sites/default/files/2023-03/Schmidt%20-%20Defining%20Terrorism_1.pdf) | Defining Terrorism | March 2023 ; Al-Sadoon, Watheq | [https://www.imctc.org/en/eLibrary/DriversOfTerrorism/Documents/Drivers\\_Terrorism-11-En.pdf](https://www.imctc.org/en/eLibrary/DriversOfTerrorism/Documents/Drivers_Terrorism-11-En.pdf) | The Impact of News Platforms on Awareness of Terrorism Risks | June 2024

<sup>vii</sup> This graphic was generated with the assistance of Claude.ai, and AI assistant developed by Anthropic. Claude was used to assist in generating the graphic on The Evolution of BLA Capability in Operation Herof. The author has reviewed all AI-generated content to ensure accuracy. Gayakwad, Shivani & Sarkar, Saurav | <https://customerportal.janes.com/entity/news/2T5WLLzUIwKPsUDDrCV?> | Co-Ordinated Baloch Separatist Militant Attacks in Pakistan's Balochistan Province Indicate a Shift in Tactics and Increased Militant Threat | 02 September 2024 ; Ali, Ammarah | <https://cscr.pk/explore/themes/defense-security/how-operation-herof-2-0-was-designed-to-communicate/> | How Operation Herof 2.0 Was Designed to Communicate | 23 February 2026 ; Musab, Muhammad | <https://www.eurasiareview.com/10022026-operation-herof-2-0-pakistans-strategic-resilience-in-balochistan-oped/> | Operation Herof 2.0: Pakistan's Strategic Resilience in Balochistan – OpEd | 10 February 2026 ; Durand Dispatch | [www.duranddispatch.com](http://www.duranddispatch.com) | Strategic Messaging, Baloch Militant Organizations | March 2026 | Volume 1, Issue 2, p12 ; Shangwan, Muskan | <https://trackingterrorism-org.eu1.proxy.openathens.net/chat/blamajeed-brigade-launches-operation-herof-black-storm/> | TRAC Incident Report: Baloch Liberation Army's (BLA) Majeed Brigade Launches 'Operation Herof' (Black Storm), Establishes Siege of Bela Camp, and Seizes Highways Across Balochistan, Pakistan – 25 August 2024 | 26 August 2024 ; South Asia Terrorism Portal | <https://www.satp.org/datasheet-terrorist-attack/major-incidents/pakistan> | Pakistan Major Incidents Datasheet, Number of Terrorism Related Incidents, 25 August 2024 and 26 August 2024

<sup>viii</sup> Afzal, Madiha | <https://www.brookings.edu/articles/at-all-costs-how-pakistan-and-china-control-the-narrative-on-the-china-pakistan-economic-corridor/> | "At All Costs": How Pakistan and China Control the Narrative on the China-Pakistan Economic Corridor | June 2020



# South and Central Asia: Transnational Threats

---

## Notes

<sup>ix</sup> Ali, Ghulam | <https://www.thinkchina.sg/politics/security-clouds-over-china-pakistan-relations-threaten-belt-and-road> | Security Clouds Over China-Pakistan Relations Threaten Belt and Road | 22 October 2024

<sup>x</sup> Khattak, Daud | <https://www.rferl.org/a/china-pakistan-cpec-police-terrorism-attack-worker-infrastructure/33643164.html> | Pakistan Creates Special Security Unit to Protect Chinese Citizens Amid a Rise in Attacks | 08 January 2026 ; Andreopoulos, Marcus | <https://thediplomat.com/2026/02/pakistans-new-special-security-unit-underscores-chinas-hold-on-the-country/> | Pakistan's New Special Security Unit Underscores China's Hold on the Country | 21 February 2026 ; EDEX | <https://www.edexlive.com/news/why-islamabads-new-china-only-security-force-is-raising-tough-questions-at-home> | Why Islamabad's new China-only security force is raising tough questions at home | 21 February 2026

<sup>xi</sup> Haider, Sarah | <https://www.aljazeera.com/news/2026/2/5/pakistan-army-says-it-killed-216-fighters-in-weeklong-balochistan-campaign> | Pakistan Army Says It Killed 216 Fighters in Weeklong Balochistan Campaign | 5 February 2026 ; Lieutenant General Ahmed Sharif Chaudhry, Spokesperson Pakistan Armed Forces | <https://x.com/OfficialDGISPR/status/2019494516357816754> | 5 February 2026

<sup>xii</sup> Ministry of Interior Government of Pakistan | <https://x.com/MOIofficialGoP/status/2008820068504002994?s=20> | 07 January 2026

<sup>xiii</sup> Barthwal, Namita | [https://idsa.in/publisher/issuebrief/cpec-phase-ii-and-china-linked-supply-chains-in-pakistan#\\_edn3](https://idsa.in/publisher/issuebrief/cpec-phase-ii-and-china-linked-supply-chains-in-pakistan#_edn3) | CPEC Phase II and China-Linked Supply Chains in Pakistan | 13 March 2026 ; Akram, Aqeel | <https://www.eurasiareview.com/28022026-the-china-pakistan-economic-corridor-cpec-strategic-shifts-and-future-prospects-oped/> | The China-Pakistan Economic Corridor (CPEC): Strategic Shifts And Future Prospects – OpEd | 28 February 2026 ; Ministry of Interior Government of Pakistan | <https://cpec.gov.pk/special-economic-zones-projects> | Industrial Cooperation/Special Economic Zones (SEZs) ; Khan, Umair | <https://www.eurasiareview.com/18012026-pakistans-industrial-renaissance-under-cpec-2-0-from-infrastructure-to-export-led-growth-oped/> | Pakistan's Industrial Renaissance Under CPEC 2.0: From Infrastructure To Export-Led Growth – OpEd | 18 January 2026



## Increased Islamic State Khorasan (ISK) Attacks Likely to Erode China-Taliban Relations

Author: Anne Marie Arthington

Division Chief: Samuel Goodpaster & Team Lead: Natalie Tarby

Editor: William Parnell

---

*We assess with moderate confidence that ISK attacks against Chinese personnel will increase due to the ineffectiveness of Taliban counterterrorism efforts, which will cause China-Taliban relations to erode within the next 6 to 12 months.* An ISK bombing of a Chinese restaurant in the Shaher-e-Naw neighborhood of Kabul on 19 January 2026 killed approximately 25 people.<sup>i</sup> ISK opposes the Taliban's relationship with Beijing and frames China as an oppressor of Muslims, particularly due to Beijing's treatment of Uyghurs in north China. ISK has repeatedly demonstrated its ability to adapt and exploit security gaps in Afghanistan.<sup>ii</sup> The Afghan Taliban has been conducting counterterrorism operations against the group, although they have been insufficient to thwart ISK's attacks.<sup>iii</sup>

- ISK's attack in Shaher-e-Naw—one of Kabul's key commercial and diplomatic zones—highlights its intent to generate international attention. Following a period of operational decline, striking the Chinese restaurant is a calculated re-entry into the militant landscape, according to two sources with third-hand access to the information and reliable track records of reporting on ISK.<sup>iv</sup>
- On 5 February 2026, Taliban spokesperson Zabihullah Mujahid described China's security concerns as unfounded. In response, China's representative in Afghanistan expressed concern about militant groups and urged the Taliban to act, according to a source with third-hand access to the information and a reliable track record of reporting on Afghanistan.<sup>v</sup>
- Because China's economic investment strategy in Afghanistan remains cautious, the Taliban is turning towards India and the United Arab Emirates for economic engagement, according to a body of sources with third-hand access to the information and reliable track records of reporting on China and Afghanistan relations.<sup>vi</sup>

### Source Summary Statement

We assess with moderate confidence that this body of reporting is both credible and reliable, and supports the judgments drawn in the analysis. While the body of the reporting is primarily third-hand, there are some sources with second-hand access. This reporting pulls primarily from well-established U.S. think tanks and the Terrorism Research and Analysis Consortium. We acknowledge intelligence gaps regarding Beijing's threshold for significantly reducing its engagement with the Taliban amidst its security concerns. Sources with firsthand access to ISK, specifically social media or public statements from ISK, would increase our confidence in its intentions.



# South and Central Asia: Transnational Threats

---

## Notes

<sup>i</sup> Prange, Nathalie | <https://trackingterrorism-org.eu1.proxy.openathens.net/chat/ied-detonates-near-chinese-hotel-in-kabul-trac/> | TRAC Incident Report: Islamic State Khurasan (ISK) Suicide Bomber Targets Chinese Restaurant on Gulfaroshi Street, Shahr-e-Naw Area, Kabul, Afghanistan | 19 January 2026

<sup>ii</sup> Stimson Center | <https://www.stimson.org/2024/transcript-afghanistans-evolving-terrorism-landscape-under-the-taliban/> | Transcript- Afghanistan's Evolving Terrorism Landscape Under the Taliban | 21 August 2024

<sup>iii</sup> Stimson Center | <https://www.stimson.org/2024/transcript-afghanistans-evolving-terrorism-landscape-under-the-taliban/> | Transcript- Afghanistan's Evolving Terrorism Landscape Under the Taliban | 21 August 2024

<sup>iv</sup> Prange, Nathalie | <https://trackingterrorism-org.eu1.proxy.openathens.net/chat/ied-detonates-near-chinese-hotel-in-kabul-trac/> | TRAC Incident Report: Islamic State Khurasan (ISK) Suicide Bomber Targets Chinese Restaurant on Gulfaroshi Street, Shahr-e-Naw Area, Kabul, Afghanistan | 19 January 2026 ; Shtuni, Adrian | <https://icct.nl/publication/islamic-state-2025-evolving-threat-facing-waning-global-response> | The Islamic State in 2025: An Evolving Threat Facing a Waning Global Response | 11 July 2025

<sup>v</sup> Afghanistan International | <https://www.afintl.com/en/202602051173> | Taliban Deny Militant Presence at Home, Blame Neighbours for ISIS Threat | 05 February 2026

<sup>vi</sup> Godek, Sarah | <https://www.stimson.org/2025/chinas-unenthusiastic-economic-engagement-with-taliban-led-afghanistan/> | China's Unenthusiastic Economic Engagement with Taliban-Led Afghanistan | 9 April 2025 ; Glasserman, Aaron & Mansoori, Ramin | <https://strategicspace.nbr.org/chinas-great-waiting-game-in-afghanistan/#easy-footnote-13-1079> | 22 January 2026 ; Andreopoulos, Marcus | <https://www.ispionline.it/en/publication/chinas-risky-bet-on-pakistan-228253> | China's Risky Bet on Pakistan | 27 January 2026 ; Shah Makhdum Karam | <https://www.wilsoncenter.org/blog-post/mining-influence-chinas-mineral-ambitions-taliban-led-afghanistan> | Mining for Influence: China's Mineral Ambitions in Taliban-Led Afghanistan | 19 August 2024



## Tehrik-e-Taliban Pakistan (TTP) Likely to Move Toward Formalized Governance

Author: Hat Alzahrani

Division Chief: Samuel Goodpaster & Team Lead: Natalie Tarby

Editor: William Parnell

---

*We assess with moderate confidence that the TTP will evolve into a proto-state capable of operating a shadow government in Pakistan's tribal regions by late 2026, which will challenge Islamabad's authority.* Under leader Noor Wali Mehsud, the TTP has replaced its "fiefdom" model of independent warlords with a centralized shadow government that imposes taxation as well as provides laws and services, such as courts, based on the Afghan Taliban's blueprint.<sup>i</sup> This shift has likely transformed the TTP from a terrorist threat into a political rival to Islamabad by filling the service gaps left by the Pakistani state in the territories formerly known as the Federally Administered Tribal Areas (FATA), now part of Khyber-Pakhtunkhwa.<sup>ii</sup> The TTP is building a local base—specifically in South Waziristan and Khyber—that will almost certainly be difficult to dismantle through military force alone.

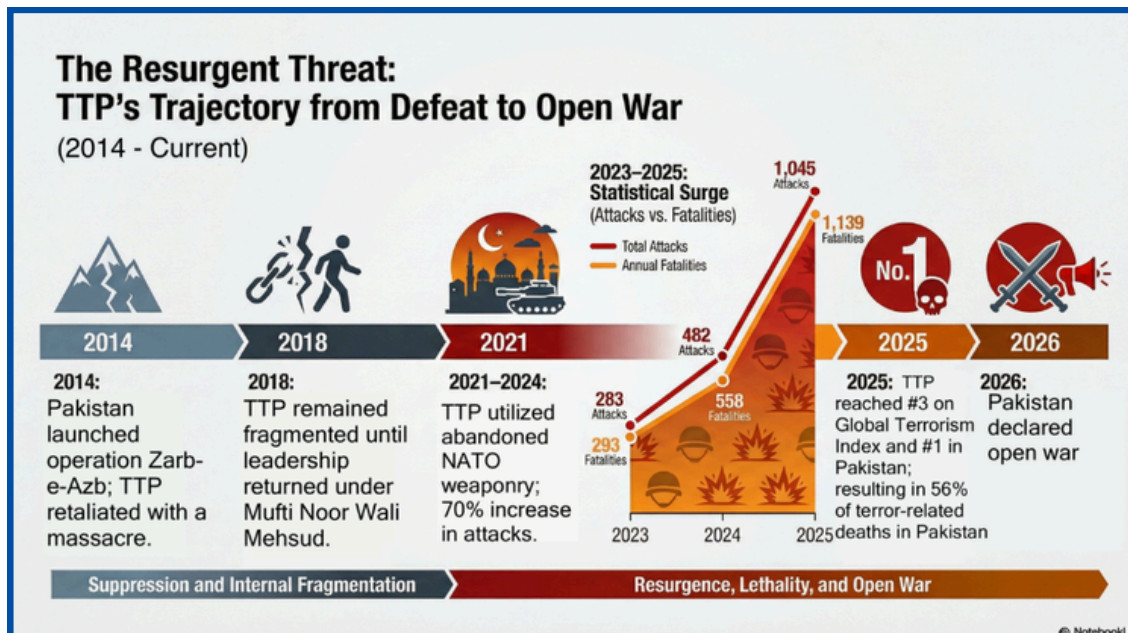
- As of late 2025, the TTP released a formal organizational blueprint that divides Pakistan into 11 provinces, formalizes its hierarchy, and portrays the organization as a governing body rather than just an insurgent group, according to a research body with second-hand access and an independent, Afghanistan-based news outlet with second-hand access to the information.<sup>iii</sup>
- On 27 March 2026, TTP militants seized a police station in Kurram District, signaling an intent to displace Pakistani law enforcement and install shadow administrative control in FATA, according to a digital repository with second-hand access to the information.<sup>iv</sup>
- The TTP operates seven functional ministries, including Economics, Political Affairs, and a parallel judicial system, to provide dispute resolution and taxation that mirror state functions, according to a digital repository with second-hand access to the information and corroborated by a body of sources.<sup>v</sup>

*We assess with moderate confidence that the TTP will further strengthen its internal unity, which will further expand the group's operations and shadow government capabilities in the next six months.* The TTP, since reunifying under Noor Wali Mehsud in 2018, has prioritized central command and cohesion to avoid the fragmentation that weakened it in the past. For its part, Islamabad has shifted toward intelligence-based operations to remove high-value targets.<sup>vi</sup>

- The TTP has implemented a succession strategy that includes training a deeper bench, ensuring the group can replace high-ranking members and continue with limited disruption, according to a reliable source with second-hand access to the information.<sup>vii</sup>
- The TTP utilizes advanced tactics, including drones, which point to a centralized procurement and training pipeline, according to two credible sources with second-hand access to the information.<sup>viii</sup>
- The TTP has recently extended its reach into areas beyond FATA, such as Balochistan and Punjab, according to a credible source with third-hand access to the information and a track record of reporting on the TTP and Afghanistan.<sup>ix</sup>



# South and Central Asia: Transnational Threats



*This graphic provides a breakdown TTP timeline (2014 – current); timeline illustrates how external support and shifting regional dynamics transformed a displaced militant group into a primary driver of the current state of open war.<sup>xv</sup>*

*We assess with moderate confidence that the TTP will increase its reliance on the Afghan Taliban and its haven in Afghanistan in the next 3-6 months, despite Islamabad's intensified military operations, which will enable sustained cross-border attacks into Pakistan.* TTP conducts cross-border attacks in Pakistan often using NATO weapons and military equipment left in Afghanistan. This evolution is enabled by the TTP's relationship with the Afghan Taliban, which provides the group with a safe haven. In response to this escalating threat, Islamabad launched Operation Ghazab lil-Haq (Wrath for the Truth) in February 2026, marking a shift from internal containment to large-scale aerial and ground strikes against TTP hideouts.<sup>xi</sup>

- The Afghan Taliban reportedly paid the family of TTP leader Noor Wali Mehsud approximately \$43,000 USD, according to three credible sources with second and third-hand access to the information and sustained records reporting in the region.<sup>xii</sup>
- TTP attacks from Afghanistan have increased since 2021, and the group is able to operate with impunity inside Afghanistan, according to a highly credible source with second-hand access to the information and a reliable history reporting on Afghanistan.<sup>xiii</sup>
- In March 2026, Pakistani President Asif Ali Zardari accused the Afghan Taliban regime of creating permissive conditions for militant networks, including the TTP, to operate within Afghanistan, according to a credible source with first-hand access to the information and a political bias.<sup>xiv</sup>

## Source Summary Statement

We have moderate confidence in the sources used in this assessment, a mix of official intergovernmental reporting, insurgent data, and corroborated independent journalism. We utilized primary sources to extract specific tactical statistics and geographic distributions; however, to mitigate the risk of propaganda and mis/disinformation, we cross-referenced these claims against verification from independent worldwide wire agencies and third-party research agencies. Our confidence is currently tempered by several critical intelligence gaps. Specifically, open-source reporting provides limited visibility into effectiveness of TTP governance within the border regions and the precise nature of financial arrangements between the Afghan Taliban and the TTP, beyond anecdotal reports of individual payments. While some evidence relies on official government statements, which may contain political bias, we cross-checked these against independent expert analysis to ensure balance. First-hand access to primary sources would increase overall confidence, but we assess that this body of reporting is sufficient to support our judgements.



# South and Central Asia: Transnational Threats

---

## Notes

<sup>i</sup> XCEPT | [https://www.xcept-research.org/wp-content/uploads/2025/03/The-reinvention-of-the-Tehrik-e-Taliban-Pakistan\\_a-case-study.pdf](https://www.xcept-research.org/wp-content/uploads/2025/03/The-reinvention-of-the-Tehrik-e-Taliban-Pakistan_a-case-study.pdf) | The Reinvention of the Tehrik-e-Taliban Pakistan: A Case Study | March 2025 |; DID PRESS AGENCY | <https://en.didpress.com/23705/> | TTP Announces Provincial and Governance Structure in Pakistan | 28 December 2025 |; TRACKING TERRORISM | <https://trackingterrorism-org.eu1.proxy.openathens.net/chatter/ttps-umar-media-released-organizational-framework-and-structure/> | TTP's Umar Media Released Organizational Framework and Structure | December 2025 |

<sup>ii</sup> ACLED | <https://acleddata.com/report/battle-borderlands-tehreek-i-taliban-pakistan-challenges-states-control> | The Battle for the Borderlands: Tehreek-i-Taliban Pakistan Challenges the State's Control | 06 October 2025 |

<sup>iii</sup> XCEPT | [https://www.xcept-research.org/wp-content/uploads/2025/03/The-reinvention-of-the-Tehrik-e-Taliban-Pakistan\\_a-case-study.pdf](https://www.xcept-research.org/wp-content/uploads/2025/03/The-reinvention-of-the-Tehrik-e-Taliban-Pakistan_a-case-study.pdf) | The Reinvention of the Tehrik-e-Taliban Pakistan: A Case Study | March 2025 |; DID PRESS AGENCY | <https://en.didpress.com/23705/> | TTP Announces Provincial and Governance Structure in Pakistan | 28 December 2025 |

<sup>iv</sup> Terrorism Research & Analysis Consortium (TRAC) | <https://trackingterrorism-org.eu1.proxy.openathens.net/chatter/video-ttp-seized-a-police-station-in-kurram-kp-pakistan/> | Tehreek-e-Taliban Pakistan (TTP) Militants Seized a Police Station Under the Leadership of Wali Kazim (Operation 'Khyber') in Kurram District, Khyber Pakhtunkhwa, Pakistan | 26 March 2026 |

<sup>v</sup> TRACKING TERRORISM | <https://trackingterrorism-org.eu1.proxy.openathens.net/chatter/ttps-umar-media-released-organizational-framework-and-structure/> | TTP's Umar Media Released Organizational Framework and Structure | December 2025 |; SATP | <https://www.satp.org/terrorism-update/ttp-announce-new-administrative-and-operational-structure-for-2026> | TTP announce new administrative and operational structure for 2026 | 26 December 2025 | THE SUNDAY GUARDIAN | <https://sundayguardianlive.com/news/top-5/ttp-unveils-2026-plan-signals-shift-to-shadow-govern-pak-162848/> | TTP unveils 2026 plan, signals shift to 'shadow-govern' Pak | 28 December 2025 | DID PRESS AGENCY | <https://en.didpress.com/23705/> | TTP Announces Provincial and Governance Structure in Pakistan | 28 December 2025 |

<sup>vi</sup> XCEPT | [https://www.xcept-research.org/wp-content/uploads/2025/03/The-reinvention-of-the-Tehrik-e-Taliban-Pakistan\\_a-case-study.pdf](https://www.xcept-research.org/wp-content/uploads/2025/03/The-reinvention-of-the-Tehrik-e-Taliban-Pakistan_a-case-study.pdf) | The Reinvention of the Tehrik-e-Taliban Pakistan: A Case Study | March 2025

<sup>vii</sup> TRACKING TERRORISM | <https://trackingterrorism-org.eu1.proxy.openathens.net/chatter/ttps-umar-media-released-organizational-framework-and-structure/> | TTP's Umar Media Released Organizational Framework and Structure | December 2025 |

<sup>viii</sup> Terrorism Research & Analysis Consortium (TRAC) | <https://trackingterrorism.org/chatter/ttp-conducted-12-attacks-under-operation-khyber-on-15-march/> | TTP Conducted 12 Attacks Under Operation Khyber on 15 March | 16 March 2026 |; Reuters | <https://www.reuters.com/world/asia-pacific/eleven-security-personnel-one-child-killed-militant-attack-pakistan-2026-02-17/> | Eleven Security Personnel, One Child Killed in Militant Attack in Pakistan | 17 February 2026 |

<sup>ix</sup> Combatting Terrorism Center at West Point | <https://ctc.westpoint.edu/leaders-fighters-and-suicide-attackers-insights-on-ttp-militant-mobility-through-commemorative-records-2006-2025/> | Leaders, Fighters, and Suicide Attackers; Insights on TTP Militant Mobility Through Commemorative Records 2006-2025 | May 2025

<sup>x</sup> This document includes content generated with the assistance of NotebookLM, a generative AI tool hosted by Google. NotebookLM was used to create this graphic. The author has reviewed and edited all AI-generated content to ensure accuracy; Dawn News | 2013-2023: Timeline of terrorist attacks on high-security sites in Pakistan in the past decade | 2013-2023: Timeline of terrorist attacks on high-security sites in Pakistan in the past decade | 18 February 2023 |



# South and Central Asia: Transnational Threats

---

## Notes

<sup>xi</sup> Council on Foreign Relations <https://www.cfr.org/articles/why-are-the-afghan-taliban-and-pakistan-in-an-open-war> | Why are the Afghan Taliban and Pakistan in an ‘Open War’? | March 2025

<sup>xii</sup> South Asia Terrorism Portal | <https://www.satp.org/terrorism-update/ttp-still-gets-financial-logistic-support-from-afghan-taliban;-says-unsc-report> | TTP Still Gets Financial, Logistic Support From Afghan Taliban; Says UNSC Report | 01 February 2026 | Security Council Report | <https://www.securitycouncilreport.org/monthly-forecast/2026-03/afghanistan-33.php> | Monthly Forecast: Afghanistan | 01 March 2026 | CACI Analyst | <https://caciaanalyst.org/publications/analytical-articles/item/13888-russias-recognition-of-the-taliban-a-counterterrorism-gamble-or-regional-security-risk?> | Russia’s Recognition of the Taliban: A Counterterrorism Gamble or Regional Security Risk? | 04 March 2026 |

<sup>xiii</sup> United Nations Security Council | <https://docs.un.org/en/S/2026/44> | Thirty-fourth Report of the Analytical Support and Sanctions Monitoring Team | 28 January 2026 |

<sup>xiv</sup> President of the Islamic Republic of Pakistan | <https://president.gov.pk/news/president-thanks-global-community-for-solidarity-calls-for-collective-resolve-against-terrorism-2> | President Thanks Global Community for Solidarity; Calls for Collective Resolve Against Terrorism | 09 February 2026 |



# Western Hemisphere Division



## ELN Likely to Sustain Low-Intensity Operations Along the Colombia-Venezuela Border in the Medium Term

Author: Tenzin Tsarong, Madeline Michel  
Division Chief: Ria Nair & Team Lead: Julie Schultz  
Editor: Joey Stabile, Julie Schultz  
Graphic Designer: Jordan Miranda

---

*We assess with moderate confidence that National Liberation Army (ELN) attacks will increase over the next six months despite planned Colombian military strikes against them, enabling the group to maintain the Colombia-Venezuela border as a hub for terrorist activity.* The Colombian military's planned strikes signal a shift in President Petro's strategy against the ELN, moving away from peace talks and negotiations.<sup>i</sup> The first strike of this new campaign occurred on 4 February 2026 and involved coordinated operations by the Colombian Aerospace Force, National Army, and National Police in El Tarra and Tibú in the Norte de Santander Department near the Venezuelan border.<sup>ii</sup> During the operation, government forces destroyed guerrilla infrastructure, seized weapons and materiel, including unmanned aerial vehicles (UAVs) and improvised explosive devices (IEDs), and killed seven ELN members.<sup>iii</sup> However, the ELN will likely increase attack frequency and engage in retaliatory violence in response to military pressure.

- On 6 February, 2026, the ELN conducted an IED attack against a Colombian military battalion in Ocaña, injuring two officers in apparent retaliation for the 4 February strike, according to an intelligence database with a reliable track record of reporting on conflict monitoring and second-hand access to statements from Colombian military leadership.<sup>iv</sup>
- On 23 February, 2026, the ELN and a 'Fuerzas Armadas Revolucionarias de Colombia-Disidente' dissident group conducted a combined IED and UAV attack against Colombian military personnel, injuring two officers, according to an open-source intelligence database with third-hand access to the Colombian military's medical response.<sup>v</sup>
- ELN retaliatory attacks resulted in a 55% increase in violence in Norte de Santander in February compared to January, according to an independent conflict monitoring organization with second-hand access to event-based data and reliable analytical track record.<sup>vi</sup>
- As of December 2025, the ELN performed state functions for economically impoverished and unstable towns on the Venezuelan side of the border, where it receives protection from the locals and plans future attacks, according to a reliable regional crime research organization with first-hand access to locals in the region and reliable track record of reporting on armed group activity.<sup>vii</sup>

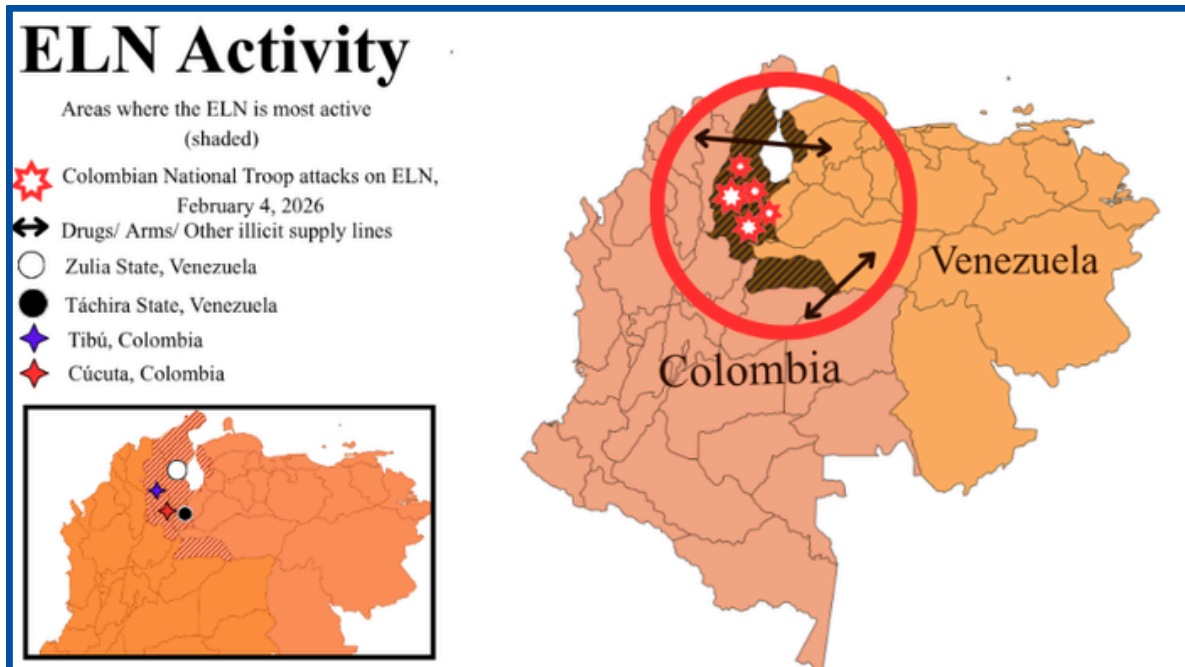
*We assess with high confidence that the ELN will consolidate its existing strongholds along the Colombia-Venezuela border over the next six months in order to generate revenue from illicit economies.* Since 2017, the ELN has maintained strongholds along the Colombia-Venezuela border, including Catatumbo and Arauca in Colombia, and across eight of Venezuela's 24 states, where it expanded its presence by displacing rival groups.<sup>viii</sup> The group operates through the control of illicit economies, such as cocaine trafficking, illegal gold mining, and extortion, which fund recruitment and logistics. By using Venezuela as a permissive sanctuary to evade military pressure, the ELN probably secures the resources and mobility needed to conduct persistent, low-intensity attacks.<sup>ix</sup> Despite the January 2026 Venezuelan leadership transition from Nicolas Maduro, ELN operations will likely persist as there is no indication of a policy shift and regime-linked networks remain intact.<sup>x</sup>

- The ELN has prioritized consolidating border control, reflecting a strategic shift toward controlling territory and securing illicit revenue streams rather than maintaining dispersed positions, according to a reliable regional crime research organization with first- and second-hand access to armed group activity reporting in Colombia and Venezuela.<sup>xi</sup>
- The ELN's Northern and Northeastern War Fronts have established a continuous corridor across the Venezuelan border state of Zulia, leveraging terrain and transit routes to move fighters and illicit resources between Venezuela and Colombia, according to a reliable regional crime research organization with first- and second-hand analytical access to armed group activity reporting.<sup>xii</sup>



## Western Hemisphere: Military and Cyber

- The ELN has developed a permanent rear-guard network of at least ten camps in Venezuela, which serve as staging areas for command, restructuring, and force protection. The group's concurrent movement of snipers and heavy weaponry through key logistics hubs indicates a readiness to project force and defend these consolidated corridors, according to a reliable U.S. Combatant Command publication with second-hand access.<sup>xiii</sup>
- The ELN restricted civilian movement across areas under its control from 14 through 17 December 2025. The group uses such actions to facilitate internal coordination and move high-value fighters across the Colombia-Venezuela border, according to first-hand ELN communications, likely intended to influence as well as inform, and corroborated by U.S. government sources with second-hand access.<sup>xiv</sup>



*This map illustrates the concentration of ELN activity along the Colombia-Venezuela border and highlights its geographic entrenchment and cross-border operating environment. Graphic created by: Canva and MapChart.<sup>xv</sup>*

### Source Summary Statement

We assess with high confidence that this body of reporting is sufficiently credible and reliable to support the analytical judgments presented in the BLUFs. Reporting from Janes and InSight Crime, both credible and well-established sources on security and organized crime, primarily informs this assessment. However, 13 of 17 sources derive from these two organizations, creating a concentration of sourcing that may limit source diversity. While some reporting is third-hand and reflects potential left-leaning bias, mainstream media has corroborated key findings. Discerning where exactly new ELN locations are along the borders is an intelligence gap as imagery is difficult to obtain due to dense tree cover.

### Notes

<sup>i</sup> Tiziano Breda, ACLED (Armed Conflict Location & Event Data) | <https://acleddata.com/report/total-peace-paradox-colombia-petros-policy-reduced-violence-armed-groups-grew-stronger> | "Total Peace" Paradox in Colombia: Petro's Policy Reduced Violence, But Armed Groups Grew Stronger | 28 November 2024 | Data project website with second-hand access to news about government policies ; Janes | [https://customer.janes.com/display/BSP\\_99366-JIR](https://customer.janes.com/display/BSP_99366-JIR) | Colombian Aerospace Force Airstrike Targeting ELN Likely To Maintain Armed Group Violence High in The Short-To-Medium Term | 12 February 2026 | Intelligence database with reliable record of reporting and access to intelligence on ELN operational methods



## Western Hemisphere: Military and Cyber

---

- <sup>ii</sup> Janes | <https://customer.janes.com/TerrorismInsurgency/Event/5mlUdtPoswhjegHcMpbRfg> | Security Forces Conduct Operation Against ELN and FARC-D Militant Groups in Colombia's Norte de Santander Department | 04 February 2026 | Intelligence database with third-hand access to news about official field reports
- <sup>iii</sup> Janes | [https://customer.janes.com/TerrorismInsurgency/GroupProfiles/Display/JTICGroup\\_1431](https://customer.janes.com/TerrorismInsurgency/GroupProfiles/Display/JTICGroup_1431) | ELN Operational Profile | 20 March 2026 | Intelligence database with reliable record of reporting and access to intelligence on ELN operational methods
- <sup>iv</sup> Janes | <https://customer.janes.com/TerrorismInsurgency/Event/2eA3hb3v1YNWZSWV507gPU> | ELN Militants Attack Security Forces in Colombia's Norte de Santander Department | 06 February 2026
- <sup>v</sup> Janes | <https://customer.janes.com/TerrorismInsurgency/Event/0QPhJfQSEXA8KY7KoBAcSq> | Suspected ELN and FARC-D Militants Attack Security Forces in Colombia's Antioquia Department | 23 February 2026
- <sup>vi</sup> ACLED | <https://acleddata.com/update/latin-america-and-caribbean-overview-march-2026#text-block-3034> | Colombia: Military Airstrike on ELN Sparks Retaliation in Norte de Santander | 09 March 2026
- <sup>vii</sup> InSight Crime [Venezuela Investigative Unit] | <https://insightcrime.org/investigations/guerrilla-governance-eln-social-control-tachira/> | Guerrilla Governance: The ELN's Social Control in Táchira | 08 December 2025
- <sup>viii</sup> InSight Crime | <https://insightcrime.org/colombia-organized-crime-news/eln-profile/> | National Liberation Army (ELN) | 12 January 2026 | Reliable regional crime research organization with first- and second-hand analytical access to organized crime activity
- <sup>ix</sup> Dialogo Americas & Julieta Pelcastre <https://dialogo-americas.com/articles/eln-rear-guard-in-venezuela-a-platform-for-transnational-projection/> | ELN Rear Guard in Venezuela: A Platform for Transnational Projection | 19 February 2026 | Reliable second-hand U.S. Combatant Command Publication
- <sup>x</sup> The Guardian | [https://www.theguardian.com/world/2026/jan/09/clashes-colombia-venezuela-border-after-maduro-capture?CMP=share\\_btn\\_url](https://www.theguardian.com/world/2026/jan/09/clashes-colombia-venezuela-border-after-maduro-capture?CMP=share_btn_url) | Clashes on Colombia-Venezuela Border After Maduro Capture | 09 January 2026 | Credible international news outlet citing regional security analyst with second-hand assessment of ELN-State relationships
- <sup>xi</sup> Insight Crime | <https://insightcrime.org/venezuela-organized-crime-news/eln-in-venezuela/> | ELN in Venezuela | 13 January 2026 | Overview of the history of ELN activity in Venezuela
- <sup>xii</sup> Jeremy McDermott, Insight Crime | <https://insightcrime.org/investigations/the-future-of-the-eln/> | The Future of the ELN | 08 December 2025 | Analytical article discussing the future of the ELN
- <sup>xiii</sup> InSight Crime | <https://x.com/InSightCrime/status/2015817607689965819> | The ELN's Presence and Criminal Activities in Zulia, Venezuela | 26 January 2026 | Graphic detailing the ELN's presence in Zulia, Venezuela
- <sup>xiv</sup> InSight Crime [Venezuela Investigative Unit] | <https://insightcrime.org/news/will-guerrillas-lose-haven-post-maduro-venezuela/> | Will Colombian Guerrillas Lose Their Safe Haven in Post-Maduro Venezuela? | 22 January 2026 | Analytical article discussing stability of Colombian Guerilla activities in a Post-Maduro Venezuela
- <sup>xv</sup> Janes | [https://customer.janes.com/display/BSP\\_99366-JIR](https://customer.janes.com/display/BSP_99366-JIR) | Colombian Aerospace Force Airstrike Targeting ELN Likely To Maintain Armed Group Violence High in The Short-To-Medium Term | 12 February 2026 | Intelligence database with reliable record of reporting and access to intelligence on ELN operational methods ; Janes | [https://customer.janes.com/TerrorismInsurgency/GroupProfiles/Display/JTICGroup\\_1431](https://customer.janes.com/TerrorismInsurgency/GroupProfiles/Display/JTICGroup_1431) | ELN Operational Profile | 20 March 2026 | Intelligence database with reliable record of reporting and access to intelligence on ELN operational methods



## Mexico Unlikely to Meet Asylum Demand, Leaving Migrants Vulnerable to Exploitation Through 2027

Author: Sonya Purcell, Aidan Ford

Division Chief: Ria Nair & Team Lead: Aidan Ford

Editor: Joey Stable

Graphic Designer: Aidan Ford

---

***We assess with moderate confidence that Mexico will increasingly reduce focus on refugee management over the next year, which will further strain processing capacity and increase migrants' vulnerability to criminal exploitation.***

Mexico received over 500,000 asylum applications over the last five years, becoming an increasingly common destination country – most from northern Central America, Cuba, Haiti, and Venezuela.<sup>i</sup> Mexico's asylum management agency, the Mexican Commission for Refugee Assistance (COMAR), has not been funded to meet demand, limiting the country's processing capability.<sup>ii</sup> As demand has grown, asylum seekers have faced months-long processing timelines, which has almost certainly resulted in Mexico failing to abide by existing national, regional, and international agreements on human rights for asylum seekers.<sup>iii</sup>

- Although irregular arrivals have declined from 2024 to 2025, asylum cases grew ~15% while Mexico's United Nations High Commissioner for Refugees' (UNHCR) budget decreased ~15.3% from 2024 through 2025, according to a first-hand UN source with a reliable track record of reporting international humanitarian statistical developments.<sup>iv</sup>
- Mexico's Institute of National Migration is further restricting legal options for asylum seekers by largely suspending the issuance of Temporary Cards for Humanitarian Reasons – a key pathway for legal protection – with issuances declining by ~97% in 2024, according to a first-hand reporting from the UN refugee agency and second-hand NGO policy analysis of humanitarian documentation trends.<sup>v</sup>
- More than half of migrants in northern Mexico in 2025 reported being victims of crime, primarily kidnapping, while criminal networks in border cities have shifted from smuggling to targeting stranded migrants as an alternative revenue source, according to reliable first-hand survey data and second-hand analytical reporting on organized crime dynamics and migration trends.<sup>vi</sup>

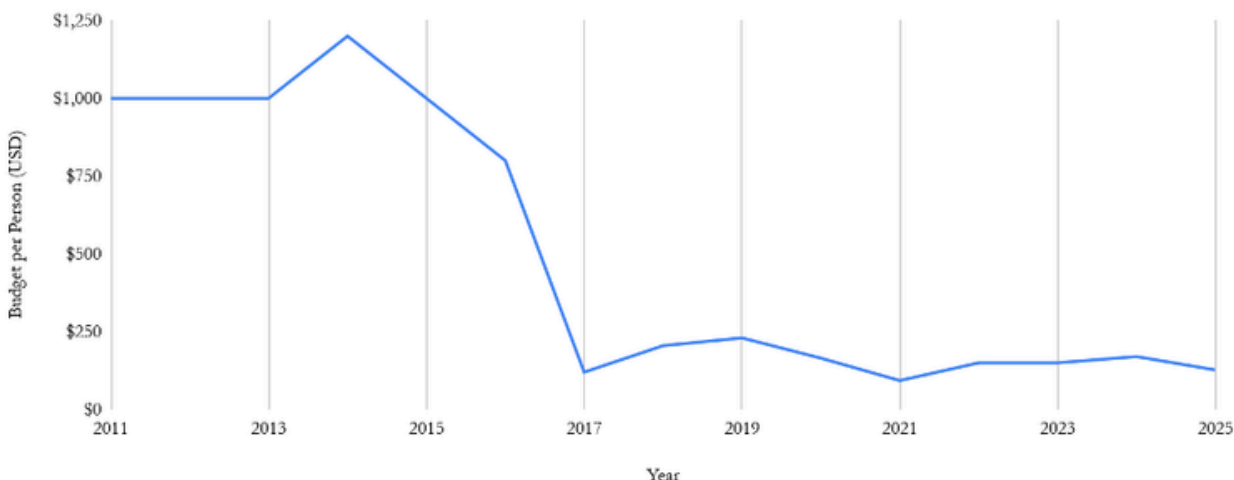
***We assess with moderate confidence that institutional fragmentation and continued strain on Mexico's asylum system will burden NGO support networks over the next year, reducing their capacity to provide fundamental migrant protections.*** Mexico is bound by international protection agreements guaranteeing asylum access and humane treatment, yet gaps between legal commitments and domestic implementation have produced persistent capacity shortfalls.<sup>vii</sup> The resource shortfall intensifies pressure on NGO infrastructure to pick up the slack, heightening shelter overcrowding, reducing service availability, and leaving many on the street vulnerable to exploitation and violence.<sup>viii</sup>

- Mexican state detention infrastructure can only hold about 5,000 people per day, and a Mexican Supreme Court ruling limits detention to 36 hours. These capacity limitations have not adapted to rising migrant flows, forcing the government to increasingly rely on large-scale internal migrant relocation, according to a recent first-hand original research source with a reliable track of reporting on international legal frameworks.<sup>ix</sup>
- Institutions such as COMAR remain reliant on external financial and technical support, while gaps in interinstitutional coordination, limited stay alternatives, and reduced access to temporary documentation disrupt continuity in asylum processing, according to a body of first- and second-hand reporting from UN agencies and humanitarian organizations.<sup>x</sup>
- Multiple migrant-support organizations have reduced staff or ceased operations since early 2025. These constraints, combined with funding uncertainty, are limiting NGOs' ability to provide accommodation and essential services to unprocessed migrants, leaving many asylum seekers stranded with no protection, according to a source with first-hand access to UN data and a journalistic source with second-hand access to on-the-ground aid workers.<sup>xi</sup>



# Western Hemisphere: Political and Economic

**Humanitarian Budget per Displaced Person (USD), 2014-2025**



*Data showing an ~85% reduction in amount of humanitarian funding per displaced person in Mexico since 2014.<sup>xii</sup>*

## Source Summary Statement

We assess with high confidence that this body of reporting is credible and sufficiently diverse to support the analytical judgments presented in the BLUFs, though confidence in projected outcomes is tempered by a gap in recent data trends beyond early 2025. The source base combines peer-reviewed academic research, international organization reporting, government publications, investigative journalism, and field-based humanitarian reporting — with multiple sources incorporating first-hand access, including UNHCR operational reporting, NGO and legal practitioner documentation, and on-the-ground humanitarian monitoring of asylum seekers and shelter conditions in Mexico. Academic studies by Gómez-Mera provide theoretically grounded and empirically supported assessments of institutional capacity gaps and protection outcomes, while UNHCR strategy documents and factsheets supply operational and funding data that, although current at time of publication, do not yet reflect recent shifts in the latter half of 2025. The convergence of humanitarian, academic, legal, and policy sources — further corroborated by litigation reporting from the Global Strategic Litigation Council, U. S. Committee for Refugees and Immigrants (USCRI), and regional investigative journalism — provides corroborated evidence on asylum system strain, institutional limitations, and migrant protection risks. However, because confirmed trend data for the remainder of 2025 has not yet been released, our judgments reflect directional assessment and should be revisited as updated reporting becomes available.

## Notes

<sup>i</sup> Secretaría de Relaciones Exteriores | <https://www.gob.mx/sre/prensa/mexico-defends-humanist-tradition-of-political-asylum?idiom=en> | Mexico Defends Humanist Tradition of Political Asylum | 04 November 2025 | Government statement outlining Mexico’s asylum policy tradition and diplomatic positioning.

<sup>ii</sup> UNHCR | <https://www.unhcr.org/us/where-we-work/countries/mexico> | Mexico | 12 June 2025 | UN refugee agency country profile summarizing asylum trends, capacity, and protection conditions

<sup>iii</sup> Rodríguez, Luis Carlos | <https://www.eluniversal.com.mx/nacion/mexico-solo-otorga-asilo-a-3-de-migrantes-que-lo-solicitan/> | México Sólo Otorga Asilo a 3% de Migrantes Que Lo Solicitan | 17 January 2026 | Investigative news article reporting asylum approval rates and migration trends.

<sup>iv</sup> UNHCR | <https://www.unhcr.org/us/where-we-work/countries/mexico> | Mexico | 12 June 2025 | UN refugee agency country profile summarizing asylum trends, capacity, and protection conditions.



## Western Hemisphere: Political and Economic

---

<sup>v</sup> USCRI | <https://refugees.org/the-struggle-for-documentation-in-mexicos-asylum-system-the-human-impact-of-withholding-the-tvrh/> | The Struggle for Documentation in Mexico's Asylum System: The Human Impact of Withholding the TVRH | 10 December 2025 | NGO policy analysis documenting barriers to humanitarian documentation for asylum seekers; UNHCR | <https://www.unhcr.org/us/where-we-work/countries/mexico> | Mexico | 12 June 2025 | UN refugee agency country profile summarizing asylum trends, capacity, and protection conditions.

<sup>vi</sup> Gómez-Mera, Laura | <https://doi.org/10.1111/lamp.12329> | A Global Protection Gap: Migrant Insecurity in Mexico | 26 February 2024 | Academic peer-reviewed article examining insecurity and protection gaps affecting migrants.; Asmann, Parker | <https://insightcrime.org/news/us-mexico-border-encounters-plummet-migrants-vulnerable/> | Even as US-Mexico Border Encounters Plummet, Migrants Are Still Vulnerable to Organized Crime | 13 October 2025 | Organized crime monitoring organization analyzing criminal exploitation of migrants.

<sup>vii</sup> UNHCR | <https://www.unhcr.org/us/where-we-work/countries/mexico> | Mexico | 12 June 2025 | UN refugee agency country profile summarizing asylum trends, capacity, and protection conditions.

<sup>viii</sup> UNHCR | <https://www.unhcr.org/us/where-we-work/countries/mexico> | Mexico | 12 June 2025 | UN refugee agency country profile summarizing asylum trends, capacity, and protection conditions.

<sup>ix</sup> Ruiz, Ariel G. | <https://www.migrationpolicy.org/research/us-mexico-relations-interests> | 12 May 2025 | Facing New Migration Realities: U.S.-Mexico Relations and Shared Interests | Policy research report from the Migration Policy Institute analyzing U.S.-Mexico migration relations and shared interests

<sup>x</sup> UNHCR | <https://www.unhcr.org/us/where-we-work/countries/mexico> | Mexico | 12 June 2025 | UN refugee agency country profile summarizing asylum trends, capacity, and protection conditions.; USCRI | <https://refugees.org/the-struggle-for-documentation-in-mexicos-asylum-system-the-human-impact-of-withholding-the-tvrh/> | The Struggle for Documentation in Mexico's Asylum System: The Human Impact of Withholding the TVRH | 10 December 2025 | NGO policy analysis documenting barriers to humanitarian documentation for asylum seekers.; UNHCR | <https://data.unhcr.org/en/documents/details/119406> | Mexico Operation Fact Sheet – Sep 2025 | 26 September 2025 | UN operational fact sheet summarizing asylum trends, system capacity, and protection conditions in Mexico; International Rescue Committee | <https://www.rescue.org/sites/default/files/2025-05/Mexico%20Rapid%20Needs%20Assessment%20%28Jan%202025%29.pdf> | 2025 Mexico Rapid Needs Assessment (January) | 01 May 2025 | Humanitarian needs assessment documenting service gaps, protection risks, and migrant support requirements in Mexico

<sup>xi</sup> Morrissey, Kate | [https://www.calonews.com/featured-topics/immigration/giving-up-on-the-dream-asylum-seekers-try-other-options-in-mexico/article\\_7f53487b-4e7d-4894-944b-a38181b51f29.html](https://www.calonews.com/featured-topics/immigration/giving-up-on-the-dream-asylum-seekers-try-other-options-in-mexico/article_7f53487b-4e7d-4894-944b-a38181b51f29.html) | Giving up on the Dream: Asylum Seekers Try Other Options in Mexico | 11 December 2025 | Regional investigative journalism covering migrant decision-making and asylum backlog conditions.; UNHCR | <https://www.unhcr.org/media/mexico-strategy-2025-2027-pdf> | Mexico Strategy 2025–2027 | November 2025 | UNHCR strategic planning document outlining operational priorities and funding needs.

<sup>xii</sup> Graphic created by Aidan Ford in Google Sheets with data from UNHCR | <https://www.unhcr.org/us/where-we-work/countries/mexico> | Mexico | 12 June 2025 | UN refugee agency country profile summarizing asylum trends, capacity, and protection conditions.



## Increased Cartel Violence in Mexico's Critical Industrial Areas Likely to Deter Nearshoring Efforts

Author: Taylor Hanak, Aidan Ford

Division Chief: Ria Nair & Team Lead: Aidan Ford

Editor: Joey Stabile

Graphic Designer: Aidan Ford

---

*We assess with high confidence that Mexican cartels will continue to disrupt fuel and oil supply chains in the short to medium term, increasing operational costs and the risk to nearshoring investments in central and southern Mexico.* For decades, fuel theft (*huachicol*) and crude oil diversion have served as major non-drug revenue streams for Mexican transnational criminal organizations, raising the cost of security, insurance, and disruption mitigation for Mexico's state-owned petroleum company, Pemex. This simultaneously discourages domestic and international investment in energy and other sectors due to energy market distortion and supply chain inefficiency as theft imposes downstream costs on consumers and commercial operators.<sup>i</sup>

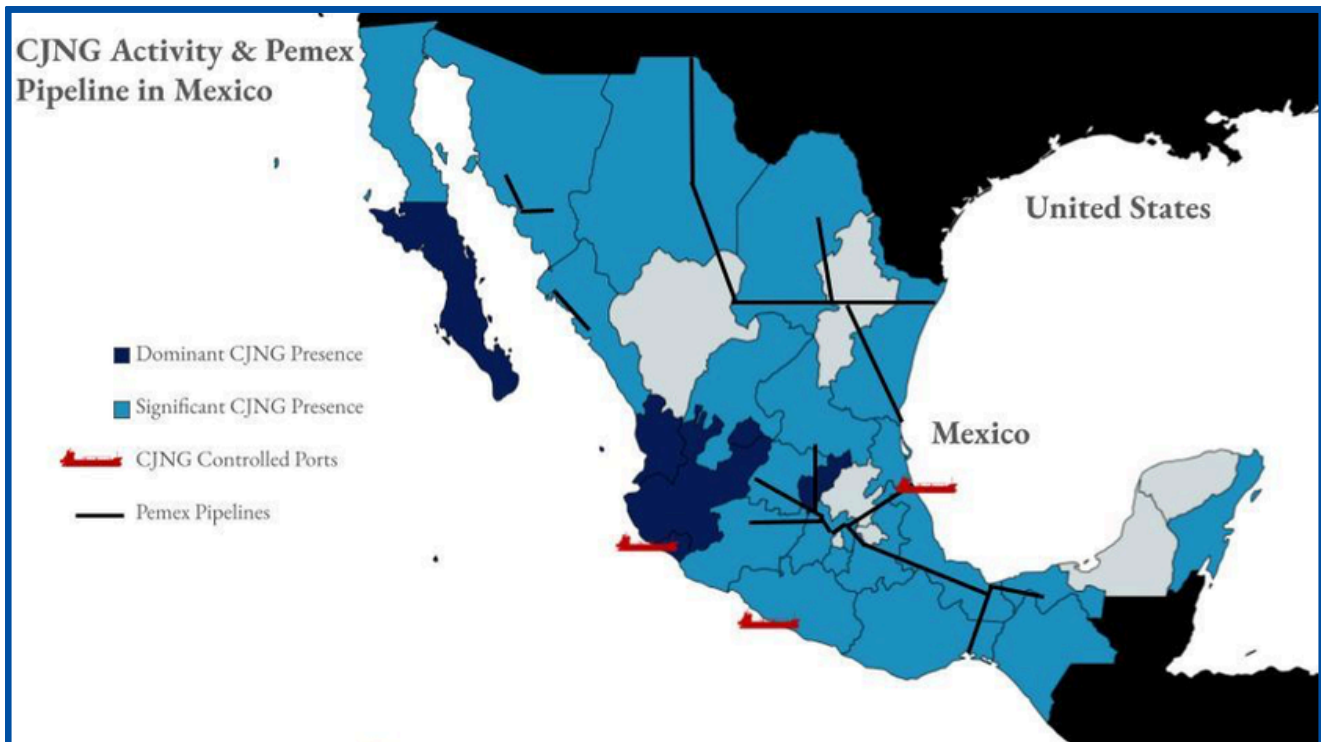
- Mexican cartels obtain crude oil through bribery, extortion, and illegal pipeline taps. Authorities discovered over 11,700 taps in 2024, according to a second-hand report compiled by U.S. government agencies with access to financial intelligence and law enforcement reporting and a body of second-hand sources with access to Pemex data.<sup>ii</sup>
- Over the past decade, *huachicol*-related violence has increasingly affected critical Pemex infrastructure and surrounding commercial activity affecting people and organizations beyond the petroleum industry, according to an analytical source with a reliable record of reporting and second-hand access to crime statistics.<sup>iii</sup>
- Illicit or adulterated fuel accounts for 30% of fuel available nationwide in Mexico as of December 2025, while earlier reporting indicates complaints of vehicle damage from compromised fuel had increased as of September 2024, according to second-hand reporting from a global news outlet citing fuel industry data and a Mexican business news outlet citing energy sector data and second-hand access to Mexican civilians.<sup>iv</sup>

*We assess with moderate confidence that fallout from the death of the *Cártel de Jalisco Nueva Generación (CJNG)* leader will lead to increased criminal violence in the short to medium term, disrupting logistics in energy-critical regions and further deterring investment in central and southern Mexico.* Following the killing of CJNG leader Nemesio Rubén Oseguera Cervantes, commonly known as *El Mencho*, on 22 February 2026, the cartel responded with retaliatory violence across multiple states.<sup>v</sup> Leadership disruptions within cartels often lead to fragmentation and internal competition, contributing to increased violence.<sup>vi</sup> Persistent insecurity via extortion, cargo theft, and disruption along key highway and trade corridors, and fuel distribution hubs in central and southern Mexico will likely continue to shape investor risk assessments.<sup>vii</sup>

- CJNG responded to *El Mencho*'s death by blockading 85 federal highways in 11 of Mexico's 31 states, including routes critical to the oil industry like Veracruz and Guanajuato. Cartels also conducted retaliatory attacks on businesses and burned vehicles, disrupting national and international commerce, according to a news source with second-hand access to crime data and first-hand reporting from security officials.<sup>viii</sup>
- CJNG currently maintains influence over the Port of Veracruz in east-central Mexico, a critical fuel import and distribution hub connected to inland supply networks, according to a body of reliable sources with second-hand access to organized crime activity and oil industry data.<sup>ix</sup>
- In 2025, cartel violence linked to fuel theft activity in central and southern Mexico resulted in hundreds of incidents, causing multiple fatalities, infrastructure damage and explosions. This discouraged investors from the region, according to a reliable source with first- and second-hand access to reporting on criminal networks in the region.<sup>x</sup>
- Since 2023, cartel violence in central and southern Mexico has deterred investment, while northern border states account for just 1% of truck hijackings and face lower overall security risks, according to credible expert analysis with second-hand access focused on hemispheric policy and business risk.<sup>xi</sup>



## Western Hemisphere: Political and Economic



*CJNG is active in much of Mexico, including the port of Veracruz on Mexico's east coast where a major pipeline terminates.<sup>21</sup>*

### Source Summary Statement

We assess with moderate confidence that this body of reporting is credible, reliable, and sufficiently diverse to support the analytical judgments presented. The source base combines peer-reviewed academic research, international organization reporting, government publications, investigative journalism, and corroboration from USG sources. While much of the evidence is second-hand analysis, multiple sources incorporate first-hand access. Regional media reporting and investigative journalism further corroborate trends in violence and other criminal activity. Significant gaps remain regarding the full extent of criminal activity in Mexico, succession plans within CJNG which could potentially avert fracturing violence, and first-hand access to cartel decision-making.



# Western Hemisphere: Political and Economic

## Notes

<sup>i</sup> Sempra Energy | <https://www.sempra.com/newsroom/press-releases/sempra-energys-ienova-unit-acquires-pemex-participation-los-ramones-ii> | Sempra Energy's IEnova Unit Acquires Pemex's Participation In The Los Ramones II Norte Pipeline | 06 October 2017 | First-hand credible report from the company purchasing part of the pipeline ; Taylor & Francis | <https://www.tandfonline.com/doi/full/10.1080/17440572.2021.1925552#references-Section1> | Theft of oil from pipelines: an examination of its crime commission in Mexico using crime script analysis | This is a credible academic article that examines oil theft from pipelines in Mexico and corroborates the significance of huachicol as a prominent revenue source for the cartels.

<sup>ii</sup> FinCEN | <https://www.fincen.gov/system/files/shared/FinCEN-Alert-Oil-Smuggling-FINAL-508C.pdf> | FinCEN Alert on Oil Smuggling Schemes on the U.S. Southwest Border Associated with Mexico-Based Cartels | 01 May 2025 | Credible Report on Mexican Cartel smuggling of crude oil from Petroleos Mexicanos (Pemex), Mexico's state-owned energy company. ; El Universal [https://www.eluniversal.com.mx/estados/hidalgo-se-mantiene-en-primer-lugar-nacional-en-robo-de-combustible-cierra-2024-con-2-mil-450-tomas-clandestinas/?utm\\_](https://www.eluniversal.com.mx/estados/hidalgo-se-mantiene-en-primer-lugar-nacional-en-robo-de-combustible-cierra-2024-con-2-mil-450-tomas-clandestinas/?utm_) | Hidalgo remains in first place nationally for fuel theft; it closes 2024 with 2,450 clandestine taps. | 02 June 2025 | This is a credible source that regionally supports the violence amongst criminal groups for access to oil pipelines and that it is centered in Hidalgo. ; United States Securities and Exchange Commission | [https://www.sec.gov/Archives/edgar/data/932782/000093278225000008/ck0000932782-20241231.htm?utm\\_](https://www.sec.gov/Archives/edgar/data/932782/000093278225000008/ck0000932782-20241231.htm?utm_) | Form 20-F Petróleos Mexicanos Annual Report | 29 April 2025 | This is a credible annual report that captures the amount of fuel theft Pemex has encountered for 2024.; Pemex | <https://www.pemex.com/en/investors/financial-information/Reporte%20de%20Resultados%20no%20Dictaminados%20%20Archivos/Reporte%203Q25.pdf> | 2025 Third Quarter Results | 27 October 2025 | This is a medium credibility report that spot checks the increasing trend of huachicol on Pemex pipelines that they have faced from 2024 to 2025.

<sup>iii</sup> InSight Crime | <https://insightcrime.org/news/mexico-multibillion-dollar-fuel-theft-crisis/#:~:text=Critical%20infrastructure%20has%20also%20drawn,371%20million%20liters%20in%202019.> | The Story of Mexico's Multibillion-Dollar Fuel Theft Crisis | 08 September 2025 | This is a credible article that shows the concentration of illegal tapping in Pemex terminals, pipelines, and refineries.

<sup>iv</sup> Mexico Business News | <https://mexicobusiness.news/automotive/news/adulterated-fuel-sparks-surge-vehicle-damagecomplaints#:~:text=These%20repairs%20often%20come%20with,could%20reach%20up%20to%2070%25.> | Adulterated Fuel Sparks Surge in Vehicle Damage Complaints | 19 September 2024 | This is a credible article that expands on Mexico's Energy Regulatory Commission's estimate of how much huachicol is prevalent in Mexico's available fuel markets. ; Bloomberg | <https://archive.is/JBnLK> | Fuel-Smuggling Crackdown Threatens to Backfire on Mexico's Sheinbaum | 18 December 2025 | This is a credible news report on the scale and supply chain integration, and reliance on industry estimates

<sup>v</sup> Atlantic Council | <https://www.atlanticcouncil.org/dispatches/decapitation-strikes-are-not-enough-to-take-on-mexicos-cartels-heres-what-else-the-us-should-do/> | Decapitation strikes are not enough to take on Mexico's cartels. Here's what else the US should do. | 02 March 2026 | Credible second hand research source with access to crime statistics and expert analysis.

<sup>vi</sup> Atlantic Council | <https://www.atlanticcouncil.org/dispatches/decapitation-strikes-are-not-enough-to-take-on-mexicos-cartels-heres-what-else-the-us-should-do/> | Decapitation strikes are not enough to take on Mexico's cartels. Here's what else the US should do. | 02 March 2026 | Credible second hand research source with access to crime statistics and expert analysis.

<sup>vii</sup> Reuters | [https://www.reutersconnect.com/item/mexicos-security-minister-details-deadly-cartel-retaliation-following-el-mencho-operation/dGFnOnJldXRlcnMuY29tLDIwMjY6bmV3c21sXlZBNzg4MzIzMDIyMDI2U1Ax?utm\\_com](https://www.reutersconnect.com/item/mexicos-security-minister-details-deadly-cartel-retaliation-following-el-mencho-operation/dGFnOnJldXRlcnMuY29tLDIwMjY6bmV3c21sXlZBNzg4MzIzMDIyMDI2U1Ax?utm_com) | Mexico's security minister details details deadly cartel retaliation following El Mencho's death.; Institute of the Americas | <https://iamericas.org/wp-content/uploads/2024/08/Organized-Crime-and-Violence-in-Mexico-report.pdf> | Organized Crime and Violence in Mexico: Considerations for Future Nearshoring FDI | August 2024 | This is a credible academic paper that specifies the deterrence of nearshoring in Mexico due to insecurity caused by Mexican cartels.



# Western Hemisphere: Political and Economic

---

## Notes

<sup>viii</sup> Reuters | [https://www.reuters.com/world/americas/mexican-drug-lord-killing-sparks-revenge-attacks-cars-businesses-set-ablaze-2026-02-23/?utm\\_](https://www.reuters.com/world/americas/mexican-drug-lord-killing-sparks-revenge-attacks-cars-businesses-set-ablaze-2026-02-23/?utm_) | Mexican Drug Lord Killing Sparks Revenge Attacks; Cars and Business set Ablaze, Highways Blocked | 23 February 2026

<sup>ix</sup> Insight Crime | <https://insightcrime.org/news/mexico-multibillion-dollar-fuel-theft-crisis/#:~:text=Critical%20infrastructure%20has%20also%20drawn,371%20million%20liters%20in%202019.> | The Story of Mexico's Multibillion-Dollar Fuel Theft Crisis | 08 September 2025; Global Guardian | <https://www.globalguardian.com/global-digest/cjng-cartel> | The Jalisco New Generation Cartel: An Intel Analyst's Guide for Travelers. | 09 January 2023; Insight Crime | <https://insightcrime.org/news/mexico-fuel-theft-market-transnational/#:~:text=For%20example%2C%20in%20September%202024,million%20liters%20of%20stolen%20fu> el. | How Mexico's Fuel Theft Market Went Transnational | 16 December 2025

<sup>x</sup> InSight Crime | <https://insightcrime.org/news/how-fuel-theft-drives-mexicos-violence-epidemic/> | How Fuel Theft Drives Mexico's Violence Epidemic | 26 September 2025

<sup>xi</sup> Global Americans | [https://globalamericans.org/for-mexicos-economy-to-grow-security-issues-need-to-be-addressed/?utm\\_](https://globalamericans.org/for-mexicos-economy-to-grow-security-issues-need-to-be-addressed/?utm_) | For Mexico's Economy To Grow, Security Issues Need To Be Addressed | 04 January 2024

<sup>xii</sup> Container Ship PNG generated by CanvaAI and refined by ChatGPT with prompts from Aidan Ford. Graphic made by Aidan Ford with data from the following sources: Insight Crime | <https://insightcrime.org/news/mexico-multibillion-dollar-fuel-theft-crisis/> | The Story of Mexico's Multibillion-Dollar Fuel Theft Crisis | Credible analysis published by a think tank that investigates, reports, provides analysis, and policy suggestions for security against organized crime. | 08 September 2025 | The map captures huachicol from pipelines in regard to the concentration of illegal taps that have been discovered. The overview provides clear distinction of the activity conducted by Mexican TCOs and predominately the CJNG.; Global Guardian | <https://www.globalguardian.com/global-digest/cjng-cartel> | The Jalisco New Generation Cartel: An Intel Analyst's Guide for Travelers | Credible Analysis by Global Guardian as it is an international security and risk management firm. | The map above shows the concentration of CJNG presence, which overlaps with logistical ports. There is also an overlap between the CJNG significance and the oil pipeline thefts in the map below.



## **Clan del Golfo Likely Transiting Panama Cocaine Through Port Infiltration and Autonomous Maritime Systems, Despite Seizures**

Author: Julia Rodrigues de Oliveira & Researcher: Kaela Gottlieb  
Division Chief: Ria Nair & Team Lead: Julia Rodrigues de Oliveira  
Editor: Joey Stabile  
Graphic Designer: Aidan Ford

---

*We assess with moderate confidence that Clan del Golfo-linked drug traffickers will prioritize port-based infiltration in Panama over the next 3-6 months, which will sustain high-volume cocaine export flows despite increased seizures by Panamanian authorities.<sup>i</sup> Clan del Golfo is Colombia's largest drug-trafficking group, operating along key cocaine trafficking corridors, including the Colombia–Panama border.<sup>ii</sup> It is also the most influential foreign criminal actor in Panama but it operates through local criminal groups to handle logistics rather than maintaining a direct organizational presence.<sup>iii</sup> Within Panama, authorities have seized larger volumes at the country's ports year over year despite continued enforcement activity.<sup>iv</sup> Port-centered trafficking will likely remain resilient because it hides within routine commercial shipping flows, often using corrupted or coerced port workers to hide illegal narcotics in otherwise licit cargo.<sup>v</sup>*

- *Clan del Golfo* finances logistics and coordinates operations through local Panamanian criminal groups at the country's concessioned ports, where only roughly 10 percent of approximately eight million containers transiting annually receive inspection, according to a Panamanian report with second-hand access, drawing on prosecutor interviews and port-sector sources with specific operational detail.<sup>vi</sup>
- In late 2025, Panama's Operation Fisher uncovered a *Clan del Golfo*-linked network that recruited Panamanian criminal groups and officials, including police, for cocaine trafficking along the Colón coast in Panama. The operation resulted in 56 arrests and \$10 million seized, according to a body of reliable sources, including a Panamanian news report with first-hand access to judicial proceedings and a specialist investigative nonprofit, drawing primarily on second-hand sources.<sup>vii</sup>
- In 2025, Panama seized 118.6 metric tons of drugs, including a 13,500-kilogram haul. Panamanian officials confiscated 25 metric tons in Colón, double the amount in the same period of 2024, in the same corridor where Operation Fisher exposed *Clan del Golfo's* trafficking network, according to a report citing Panamanian Security Minister Frank Abrego, a second-hand but verifiable official statement with institutional incentives to emphasize enforcement.<sup>viii</sup>

*We assess with moderate confidence that Clan del Golfo-linked traffickers will increase cross-border cocaine flows into Panamanian networks in the next 3-6 months by leveraging expanded territorial reach and increased recruitment.<sup>ix</sup> Throughout 2025, *Clan del Golfo* expanded membership and territorial reach into new Colombian regions while it participated in exploratory peace talks with the Colombian government.<sup>x</sup> The group continues to recruit beyond the Urabá region and deploy operatives to control drug transport routes in new regions, which will likely increase its capacity to conduct trafficking operations across the border.<sup>xi</sup>*

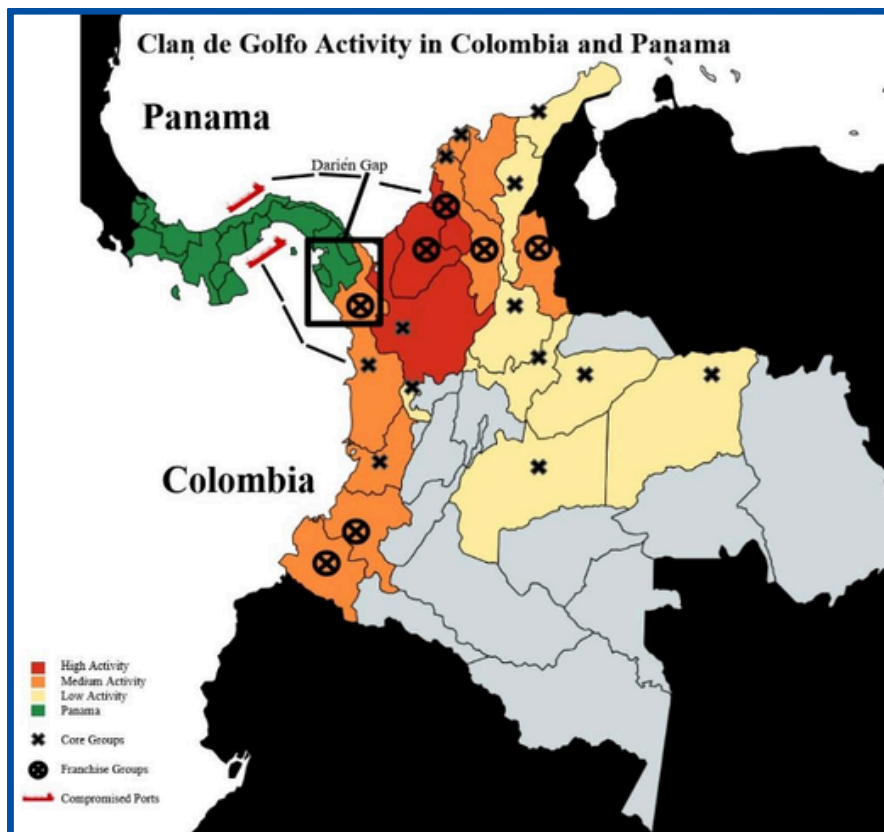
- As of July 2025, *Clan del Golfo* has more than 9,500 members, a 165 percent increase since 2018. The group recruited an estimated 2,300 new members during 2025 alone, a 30 percent increase from the previous year, according to a body of sources, including a credible Colombian security think tank, drawing on second-hand access from *Colombia's Fuerza Pública* (the combined military and national police force) membership counts.<sup>xii</sup>
- In May 2025, Colombian authorities captured seven *Clan del Golfo* members in *Valle del Cauca* under *Operación Agamenón*, reflecting urban recruitment and expansion beyond *Clan del Golfo's* Urabá base, according to an official Colombian police press release with first-hand access to operational details, but with incentives to highlight enforcement success.<sup>xiii</sup>
- As of early 2026, *Clan del Golfo* has bypassed binational checkpoints in the Darién Gap and planted anti-personnel mines near joint Colombia-Panamanian checkpoints operated by border enforcement forces, according to a report relying on-record remarks by Panama's security minister, a second-hand but verifiable official statement.<sup>xiv</sup>



## Western Hemisphere: Transnational Threats

*We assess with moderate confidence that Clan del Golfo-linked traffickers will continue to invest in maritime delivery and concealment methods in the next 3-6 months, which will limit the impact of enforcement operations on overall cocaine shipment volume.*<sup>xv</sup> Most cocaine reaching Panama arrives via maritime routes from Colombia, where cocaine production has remained at record levels since 2023.<sup>xvi</sup> Traffickers are testing autonomous maritime delivery systems that eliminate reliance on crews who might cooperate with authorities if captured.<sup>xvii</sup> By reducing operator exposure and complicating detection, modified autonomous systems will likely increase the resiliency of maritime trafficking routes into Panama's ports.<sup>xviii</sup>

- In July 2025, Colombian authorities seized an uncrewed semi-submersible near Santa Marta capable of carrying more than 1.5 tons, equipped with antennas, a Starlink modem, and surveillance cameras. The navy assessed the vessel as linked to Clan del Golfo and reported detecting 10 semi-submersibles in the first half of 2025, according to on-the-ground reporting with first-hand access to the Colombian navy and external investigators.<sup>xix</sup>
- Intercepted vessels account for roughly 5 percent of the total in use. Construction of a semi-submersible costs between \$150,000 and \$2 million, while a single vessel carrying 1.5 metric tons of cocaine represents an estimated wholesale value of roughly \$82 million, making even the loss of a vessel a minor cost relative to a single successful shipment, according to the same source.<sup>xx</sup>
- As of May 2025, Colombia-based maritime traffickers have been modifying vessels to improve concealment from radar and thermal detection, through heat-shielding devices, and ocean-matched camouflage paint, according to an investigative nonprofit with second-hand access that cites maritime authorities.<sup>xxi</sup>



*Clan del Golfo activity in Colombia and Panama, showing high, medium, and low activity zones, core and franchise group locations, compromised ports, and the Darién Gap border corridor. Graphic created by: MapChart, Google Slides, Canva AI and ChatGPT.<sup>xxiii</sup>*



# Western Hemisphere: Transnational Threats

## Source Summary Statement

We assess with moderate confidence that this body of evidence is credible. This product refers to the group as *Clan del Golfo*, although some sources refer to it as the Gaitanist Self-Defense Forces of Colombia (*Autodefensas Gaitanistas de Colombia*) or *Los Urabeños*. This research draws on a body of reporting from specialist organized crime research organizations, Colombian security analysis, Colombian and international journalism, Panamanian reporting, official statements, international drug monitoring bodies, and Colombian law enforcement releases. Colombia-focused, Spanish-language sources, including domestic reporting and analysis, provide structured context on the *Clan del Golfo*'s size, areas of influence, and the domestic security and negotiation environment that can shape trafficking adaptation. Official releases from Colombian security institutions provide time-stamped indicators of arrests and operations, but they reflect institutional incentives to emphasize success and often use investigative language for alleged roles and intent. Cross-border insights into trafficking methods and route displacement come largely from specialist synthesis and investigative journalism that compile multi-country reporting, seizure references, and interviews. Panama-focused reporting and attributable official statements by Panamanian security officials provide Panama-side indicators, such as seizure patterns, routes, and smuggling methods, that help track cocaine movement through the country. Most operational detail derives from reporting published between March 2025 and January 2026; the analytic line relies on trend-level consistency across sources rather than a single point-in-time snapshot, though direct visibility into route-level and shipment-level decisions remains limited. Key intelligence gaps include limited direct visibility into how the *Clan del Golfo* allocates shipments between maritime and overland routes, and how frequently it relies on local partners rather than direct operatives. The estimated shipment value cited in the third judgment paragraph derives from European wholesale price data embedded in the United Nations Office on Drugs and Crime charts; the figure reflects 2018 pricing, and inflation, exchange rate fluctuations, and regional price variation since 2018 may affect accuracy. No source in this product provides destination-market wholesale price data specific to cocaine shipments transiting Panama.

## Notes

<sup>i</sup> Newsroom Panama | <https://newsroompanama.com/2025/03/23/panamas-ports-have-become-a-booming-route-for-cocaine-trafficking/> | Panama's Ports have become a Booming Route for Cocaine Trafficking | 23 March 2025 ; InSight Crime | <https://insightcrime.org/panama-organized-crime-news/panama/> | Panama Profile | 18 November 2025; Tico Times | <https://ticotimes.net/2025/08/27/panama-sees-record-cocaine-flow-through-ports-bound-for-europe> Panama Sees Record Cocaine Flow Through Ports Bound for Europe | 27 August 2025 ; Prensa Latina | <https://www.prensa-latina.cu/2025/09/02/citan-a-panama-como-puente-de-transporte-de-drogas-en-contenedores/> | "Citan a Panamá como puente de transporte de drogas en contenedores" ["Panama is cited as a bridge for transporting drugs in containers"] | 02 September 2025 | Cuban state wire service; medium reliability for attributed official quotes; second-hand access via reports.

<sup>ii</sup> InSight Crime | <https://insightcrime.org/colombia-organized-crime-news/urabenos-profile/> | Gaitanistas – Gulf Clan | 18 March 2025 ; Fundación Ideas para la Paz (FIP) | <https://ideaspaz.forg/publicaciones/noticias/2025-08/asi-llega-el-clan-del-golfo-a-un-nuevo-intento-de-dialogos-de-paz-ahora-en-catar> | Así llega el Clan del Golfo a un nuevo intento de diálogos de paz, ahora en Catar [This is how the Clan del Golfo enters a new attempt at peace talks, now in Qatar] | 15 August 2025 ; El Colombiano | <https://www.elcolombiano.com/colombia/clan-del-golfo-crecio-30-pese-a-tener-espacio-en-paz-total-FH33070731> | El Clan del Golfo creció un 30% pese a tener una mesa en la Paz Total [The Clan del Golfo grew by 30% despite having a place at the Total Peace negotiating table] | 09 February 2026 ; InSight Crime | <https://insightcrime.org/news/urabenos-after-otoniel-what-becomes-colombia-largest-criminal-threat/> | The Gaitanistas After Otoniel – What Becomes of Colombia's Largest Criminal Threat? | 1 Nov 2021



# Western Hemisphere: Transnational Threats

## Notes

<sup>iii</sup> InSight Crime | <https://insightcrime.org/panama-organized-crime-news/panama/> | Panama Profile | 18 November 2025 ; Newsroom Panama | <https://newsroompanama.com/2025/03/23/panamas-ports-have-become-a-booming-route-for-cocaine-trafficking/> | Panama's Ports have become a Booming Route for Cocaine Trafficking | 23 March 2025; Global Initiative Against Transnational Organized Crime / Fundacion Ideas para la Paz | <https://globalinitiative.net/wp-content/uploads/2022/11/Andre%CC%81s-Cajiao-Paula-Tobo-Mariana-Botero-Restrepo-On-the-border-The-Gulf-Clan-irregular-migration-and-organized-crime-in-Daric%CC%81n-GI-TOC-November-2022.pdf> | On the Border: The Gulf Clan, Irregular Migration and Organized Crime in Darien | November 2022 | Joint transnational crime research network and Colombian think tank; high reliability; mixed first and second-hand field access ; InSight Crime | <https://insightcrime.org/news/urabenos-after-otoniel-what-becomes-colombia-largest-criminal-threat/> | The Gaitanistas After Otoniel – What Becomes of Colombia's Largest Criminal Threat? | 1 November 2021

<sup>iv</sup> Tico Times | <https://ticotimes.net/2025/08/27/panama-sees-record-cocaine-flow-through-ports-bound-for-europe> | Panama Sees Record Cocaine Flow Through Ports Bound for Europe | 27 August 2025 ; Agence France-Presse (via Tico Times) | <https://ticotimes.net/2026/01/01/panama-reports-rising-criminal-pressure-as-cocaine-flow-surges> | Panama Reports Rising Criminal Pressure as Cocaine Flow Surges | 01 Jan 2026

<sup>v</sup> Newsroom Panama | <https://newsroompanama.com/2025/03/23/panamas-ports-have-become-a-booming-route-for-cocaine-trafficking/> | Panama's Ports have become a Booming Route for Cocaine Trafficking | 23 March 2025 ; InSight Crime | <https://insightcrime.org/panama-organized-crime-news/panama/> | Panama Profile | 18 November 2025; Prensa Latina | <https://www.prensa-latina.cu/2025/09/02/citan-a-panama-como-puente-de-transporte-de-drogas-en-contenedores/> | “Citan a Panamá como puente de transporte de drogas en contenedores” [“Panama is cited as a bridge for transporting drugs in containers”] | 02 September 2025

<sup>vi</sup> Newsroom Panama | <https://newsroompanama.com/2024/01/25/51-detained-in-operation-fisher-called-to-trial> | 51 detained in Operation Fisher called to trial | 25 January 2024 ; Newsroom Panama | <https://newsroompanama.com/2025/03/23/panamas-ports-have-become-a-booming-route-for-cocaine-trafficking/> | Panama's Ports have become a Booming Route for Cocaine Trafficking | 23 Mar 2025 ; InSight Crime | <https://insightcrime.org/panama-organized-crime-news/panama/> | Panama Profile | 18 November 2025

<sup>vii</sup> Agence France-Presse (via Tico Times) | <https://ticotimes.net/2026/01/01/panama-reports-rising-criminal-pressure-as-cocaine-flow-surges> | Panama Reports Rising Criminal Pressure as Cocaine Flow Surges | 01 January 2026 ; Tico Times | <https://ticotimes.net/2025/08/27/panama-sees-record-cocaine-flow-through-ports-bound-for-europe> | Panama Sees Record Cocaine Flow Through Ports Bound for Europe | 27 August 2025

<sup>viii</sup> Tico Times | <https://ticotimes.net/2025/08/27/panama-sees-record-cocaine-flow-through-ports-bound-for-europe> | Panama Sees Record Cocaine Flow Through Ports Bound for Europe | 27 August 2025 ; Agence France-Presse (via Tico Times) | <https://ticotimes.net/2026/01/01/panama-reports-rising-criminal-pressure-as-cocaine-flow-surges> | Panama Reports Rising Criminal Pressure as Cocaine Flow Surges | 01 Jan 2026

<sup>ix</sup> InSight Crime | <https://insightcrime.org/colombia-organized-crime-news/urabenos-profile/> | Gaitanistas – Gulf Clan | 18 March 2025 ; Fundación Ideas para la Paz (FIP) | <https://ideaspaz.forg/publicaciones/noticias/2025-08/asi-llega-el-clan-del-golfo-a-un-nuevo-intento-de-dialogos-de-paz-ahora-en-catar> | Así llega el Clan del Golfo a un nuevo intento de diálogos de paz, ahora en Catar [This is how the Clan del Golfo enters a new attempt at peace talks, now in Qatar] | 15 August 2025 ; El Colombiano | <https://www.elcolombiano.com/colombia/clan-del-golfo-crecio-30-pese-a-tener-espacio-en-paz-total-FH33070731> | El Clan del Golfo creció un 30% pese a tener una mesa en la Paz Total [The Clan del Golfo grew by 30% despite having a place at the Total Peace negotiating table] | 09 February 2026 ; Agence France-Presse (via Tico Times) | <https://ticotimes.net/2026/01/01/panama-reports-rising-criminal-pressure-as-cocaine-flow-surges> | Panama Reports Rising Criminal Pressure as Cocaine Flow Surges | 01 Jan 2026



# Western Hemisphere: Transnational Threats

## Notes

<sup>x</sup> InSight Crime | <https://insightcrime.org/news/gamechangers-2025-colombia-total-peace-in-pieces/> | GameChangers 2025: Colombia's Total Peace Remains in Pieces | 05 January 2026 ; InSight Crime | <https://insightcrime.org/colombia-organized-crime-news/urabenos-profile/> | Gaitanistas – Gulf Clan | 18 March 2025 ; InSight Crime | <https://insightcrime.org/news/urabenos-after-otoniel-what-becomes-colombia-largest-criminal-threat/> | The Gaitanistas After Otoniel – What Becomes of Colombia's Largest Criminal Threat? | 1 November 2021 ; UNODC | [https://www.unodc.org/documents/data-and-analysis/cocaine/Global\\_cocaine\\_report\\_2023.pdf](https://www.unodc.org/documents/data-and-analysis/cocaine/Global_cocaine_report_2023.pdf) | Global Report on Cocaine 2023: Local Dynamics, Global Challenges | March 2023 ; Luke Taylor, the Guardian | <https://www.theguardian.com/global-development/2025/feb/12/colombia-gustavo-petro-total-peace-farc-eln-drug-trafficking-cartel-violence-venezuela> | All hell broke loose: Colombia rethinks 'total peace' plan as violence grips north | 12 February 2025 Fundación Ideas para la Paz (FIP) | <https://ideaspaz.forg/publicaciones/noticias/2025-08/asi-llega-el-clan-del-golfo-a-un-nuevo-intento-de-dialogos-de-paz-ahora-en-catar> | Así llega el Clan del Golfo a un nuevo intento de diálogos de paz, ahora en Catar [This is how the Clan del Golfo enters a new attempt at peace talks, now in Qatar] | 15 August 2025 ; El Colombiano | <https://www.elcolombiano.com/colombia/clan-del-golfo-crecio-30-pese-a-tener-espacio-en-paz-total-FH33070731> | El Clan del Golfo creció un 30% pese a tener una mesa en la Paz Total [The Clan del Golfo grew by 30% despite having a place at the Total Peace negotiating table] | 09 February 2026 ; Global Initiative Against Transnational Organized Crime / Fundación Ideas para la Paz | <https://globalinitiative.net/wp-content/uploads/2022/11/Andre%CC%81s-Cajiao-Paula-Tobo-Mariana-Botero-Restrepo-On-the-border-The-Gulf-Clan-irregular-migration-and-organized-crime-in-Darie%CC%81n-GI-TOC-November-2022.pdf> | On the Border: The Gulf Clan, Irregular Migration and Organized Crime in Darien | November 2022

<sup>xi</sup> InSight Crime | <https://insightcrime.org/colombia-organized-crime-news/urabenos-profile/> | Gaitanistas – Gulf Clan | 18 March 2025 ; Fundación Ideas para la Paz (FIP) | <https://ideaspaz.forg/publicaciones/noticias/2025-08/asi-llega-el-clan-del-golfo-a-un-nuevo-intento-de-dialogos-de-paz-ahora-en-catar> | Así llega el Clan del Golfo a un nuevo intento de diálogos de paz, ahora en Catar [This is how the Clan del Golfo enters a new attempt at peace talks, now in Qatar] | 15 August 2025 ; Policía Nacional de Colombia | <https://www.policia.gov.co/noticia/afectacion-al-componente-armado-gao-clan-del-golfo-con-injerencia-en-norte-del-valle> | Afectación al componente armado GAO Clan del Golfo con injerencia en el norte del Valle [Damage to the armed component of the Clan del Golfo organized armed group operating in northern Valle] | 08 May 2025 ;

<sup>xii</sup> Fundación Ideas para la Paz (FIP) | <https://ideaspaz.forg/publicaciones/noticias/2025-08/asi-llega-el-clan-del-golfo-a-un-nuevo-intento-de-dialogos-de-paz-ahora-en-catar> | Así llega el Clan del Golfo a un nuevo intento de diálogos de paz, ahora en Catar [This is how the Clan del Golfo enters a new attempt at peace talks, now in Qatar] | 15 August 2025 ; El Colombiano | <https://www.elcolombiano.com/colombia/clan-del-golfo-crecio-30-pese-a-tener-espacio-en-paz-total-FH33070731> | El Clan del Golfo creció un 30% pese a tener una mesa en la Paz Total [The Clan del Golfo grew by 30% despite having a place at the Total Peace negotiating table] | 09 February 2026 ;

<sup>xiii</sup> Policía Nacional de Colombia | <https://www.policia.gov.co/noticia/afectacion-al-componente-armado-gao-clan-del-golfo-con-injerencia-en-norte-del-valle> | Afectación al componente armado GAO Clan del Golfo con injerencia en el norte del Valle [Damage to the armed component of the Clan del Golfo organized armed group operating in northern Valle] | 08 May 2025 ; El Colombiano | <https://www.elcolombiano.com/colombia/clan-del-golfo-crecio-30-pese-a-tener-espacio-en-paz-total-FH33070731> | El Clan del Golfo creció un 30% pese a tener una mesa en la Paz Total [The Clan del Golfo grew by 30% despite having a place at the Total Peace negotiating table] | 09 February 2026 ; InSight Crime | <https://insightcrime.org/colombia-organized-crime-news/urabenos-profile/> | Gaitanistas – Gulf Clan | 18 March 2025

<sup>xiv</sup> Agence France-Presse (via Tico Times) | <https://ticotimes.net/2026/01/01/panama-reports-rising-criminal-pressure-as-cocaine-flow-surges> | Panama Reports Rising Criminal Pressure as Cocaine Flow Surges | 01 Jan 2026 ; InSight Crime | <https://insightcrime.org/panama-organized-crime-news/panama/> | Panama Profile | 18 November 2025 ; Global Initiative Against Transnational Organized Crime / Fundación Ideas para la Paz | <https://globalinitiative.net/wp-content/uploads/2022/11/Andre%CC%81s-Cajiao-Paula-Tobo-Mariana-Botero-Restrepo-On-the-border-The-Gulf-Clan-irregular-migration-and-organized-crime-in-Darie%CC%81n-GI-TOC-November-2022.pdf> | On the Border: The Gulf Clan, Irregular Migration and Organized Crime in Darien | November 2022 ;



# Western Hemisphere: Transnational Threats

---

## Notes

<sup>xv</sup> Sam Woolston and Henry Shuldiner | <https://insightcrime.org/news/under-radar-what-hundreds-ofnarco-sub-seizures-tell-us-about-global-cocaine-routes/> | Under the Radar: What Hundreds of Narco Sub Seizures Tell Us About Global Cocaine Routes | 16 May 2025 ; The Guardian | <https://www.theguardian.com/world/2025/jul/11/colombia-narco-submarine-cocaine> | Colombia identifies new threat in drug war: the autonomous narco drone sub | 11 July 2025 ; UNODC | [https://www.unodc.org/documents/data-and-analysis/cocaine/Global\\_cocaine\\_report\\_2023.pdf](https://www.unodc.org/documents/data-and-analysis/cocaine/Global_cocaine_report_2023.pdf) | Global Report on Cocaine 2023: Local Dynamics, Global Challenges | March 2023

<sup>xvi</sup> InSight Crime | <https://insightcrime.org/panama-organized-crime-news/panama/> | Panama Profile | 18 November 2025 ; UNODC | [https://www.unodc.org/documents/data-and-analysis/WDR\\_2025/WDR25\\_B1\\_Key\\_findings.pdf](https://www.unodc.org/documents/data-and-analysis/WDR_2025/WDR25_B1_Key_findings.pdf) | World Drug Report 2025: Key Findings | June 2025 | UN drug monitoring agency; high reliability for global production and seizure estimates; second-hand member-state data.

<sup>xvii</sup> The Guardian | <https://www.theguardian.com/world/2025/jul/11/colombia-narco-submarine-cocaine> | Colombia identifies new threat in drug war: the autonomous narco drone sub | 11 July 2025 ; Sam Woolston and Henry Shuldiner | <https://insightcrime.org/news/under-radar-what-hundreds-ofnarco-sub-seizures-tell-us-about-global-cocaine-routes/> | Under the Radar: What Hundreds of Narco Sub Seizures Tell Us About Global Cocaine Routes | 16 May 2025

<sup>xviii</sup> Sam Woolston and Henry Shuldiner | <https://insightcrime.org/news/under-radar-what-hundreds-ofnarco-sub-seizures-tell-us-about-global-cocaine-routes/> | Under the Radar: What Hundreds of Narco Sub Seizures Tell Us About Global Cocaine Routes | 16 May 2025 ; The Guardian | <https://www.theguardian.com/world/2025/jul/11/colombia-narco-submarine-cocaine> | Colombia identifies new threat in drug war: the autonomous narco drone sub | 11 July 2025

<sup>xix</sup> The Guardian | <https://www.theguardian.com/world/2025/jul/11/colombia-narco-submarine-cocaine> | Colombia identifies new threat in drug war: the autonomous narco drone sub | 11 July 2025 ; Sam Woolston and Henry Shuldiner | <https://insightcrime.org/news/under-radar-what-hundreds-ofnarco-sub-seizures-tell-us-about-global-cocaine-routes/> | Under the Radar: What Hundreds of Narco Sub Seizures Tell Us About Global Cocaine Routes | 16 May 2025

<sup>xx</sup> The Guardian | <https://www.theguardian.com/world/2025/jul/11/colombia-narco-submarine-cocaine> | Colombia identifies new threat in drug war: the autonomous narco drone sub | 11 Jul 2025 ; Sam Woolston and Henry Shuldiner | <https://insightcrime.org/news/under-radar-what-hundreds-ofnarco-sub-seizures-tell-us-about-global-cocaine-routes/> | Under the Radar: What Hundreds of Narco Sub Seizures Tell Us About Global Cocaine Routes | 16 May 2025 ; UNODC | [https://www.unodc.org/documents/data-and-analysis/cocaine/Global\\_cocaine\\_report\\_2023.pdf](https://www.unodc.org/documents/data-and-analysis/cocaine/Global_cocaine_report_2023.pdf) | Global Report on Cocaine 2023: Local Dynamics, Global Challenges | March 2023 ; UNODC | [https://www.unodc.org/documents/data-and-analysis/WDR\\_2025/WDR25\\_B1\\_Key\\_findings.pdf](https://www.unodc.org/documents/data-and-analysis/WDR_2025/WDR25_B1_Key_findings.pdf) | World Drug Report 2025: Key Findings | June 2025

<sup>xxi</sup> UNODC | [https://www.unodc.org/documents/data-and-analysis/WDR\\_2025/WDR25\\_B1\\_Key\\_findings.pdf](https://www.unodc.org/documents/data-and-analysis/WDR_2025/WDR25_B1_Key_findings.pdf) | World Drug Report 2025: Key Findings | June 2025 ; Sam Woolston and Henry Shuldiner | <https://insightcrime.org/news/under-radar-what-hundreds-ofnarco-sub-seizures-tell-us-about-global-cocaine-routes/> | Under the Radar: What Hundreds of Narco Sub Seizures Tell Us About Global Cocaine Routes | 16 May 2025



# Western Hemisphere: Transnational Threats

---

## Notes

<sup>xxii</sup> Tico Times | <https://ticotimes.net/2025/08/27/panama-sees-record-cocaine-flow-through-ports-bound-for-europe> | Panama Sees Record Cocaine Flow Through Ports Bound for Europe | 27 August 2025 ; Newsroom Panama | <https://newsroompanama.com/2025/03/23/panamas-ports-have-become-a-booming-route-for-cocaine-trafficking/> | Panama's Ports have become a Booming Route for Cocaine Trafficking | 23 March 2025; Agence France-Presse (via Tico Times) | <https://ticotimes.net/2026/01/01/panama-reports-rising-criminal-pressure-as-cocaine-flow-surges> | Panama Reports Rising Criminal Pressure as Cocaine Flow Surges | 01 January 2026 ; Fundación Ideas para la Paz (FIP) | <https://ideaspaz.forg/publicaciones/noticias/2025-08/asi-llega-el-clan-del-golfo-a-un-nuevo-intento-de-dialogos-de-paz-ahora-en-catar> | Así llega el Clan del Golfo a un nuevo intento de diálogos de paz, ahora en Catar [This is how the Clan del Golfo enters a new attempt at peace talks, now in Qatar] | 15 August 2025 ; El Colombiano | <https://www.elcolombiano.com/colombia/clan-del-golfo-crecio-30-pese-a-tener-espacio-en-paz-total-FH33070731> | El Clan del Golfo creció un 30% pese a tener una mesa en la Paz Total [The Clan del Golfo grew by 30% despite having a place at the Total Peace negotiating table] | 09 February 2026 ; The Guardian | <https://www.theguardian.com/world/2025/jul/11/colombia-narco-submarine-cocaine> | Colombia identifies new threat in drug war: the autonomous narco drone sub | 11 Jul 2025 ; Vanessa Buschschlüter, BBC News | <https://www.bbc.com/news/articles/cpq4wgle4x5o> | US designates Colombian cocaine gang a terrorist group | 16 December 2025 | Major international news outlet; high reliability for official designations and government statements; second-hand access.

<sup>xxiii</sup> InSight Crime | <https://insightcrime.org/panama-organized-crime-news/panama/> | Panama Profile | 18 November 2025 ; InSight Crime | <https://insightcrime.org/colombia-organized-crime-news/urabenos-profile/> | Gaitanistas – Gulf Clan | 18 Mar 2025 ; InSight Crime | <https://insightcrime.org/news/urabenos-after-otoniel-what-becomes-colombia-largest-criminal-threat/> | The Gaitanistas After Otoniel – What Becomes of Colombia's Largest Criminal Threat? | 1 November 2021 ; Global Initiative Against Transnational Organized Crime / Fundación Ideas para la Paz | <https://globalinitiative.net/wp-content/uploads/2022/11/Andre%CC%81s-Cajiao-Paula-Tobo-Mariana-Botero-Restrepo-On-the-border-The-Gulf-Clan-irregular-migration-and-organized-crime-in-Darie%CC%81n-GI-TOC-November-2022.pdf> | On the Border: The Gulf Clan, Irregular Migration and Organized Crime in Darien | November 2022



## Colectivos Likely to Remain a Coercive Tool for the Chavista Regime

Author: Caleb Helsel, Julia Rodrigues de Oliveira  
Division Chief: Ria Nair & Team Lead: Julia Rodrigues de Oliveira  
Editor: Joey Stabile, Aidan Ford  
Graphic Designer: Jordan Miranda

***We assess with moderate confidence that a sustained colectivo street presence will limit the opposition's ability to coordinate by increasing civilian fear of identification, detention and retaliation in the next 3-6 months.<sup>i</sup>***

Colectivos—pro-regime militias that function as auxiliary military forces—loyalty to the hardline Interior, Justice, and Peace Minister, Diosdado Cabello have created a parallel authority structure within Venezuela.<sup>ii</sup> Since early January 2026, colectivos have been emboldened to conduct intimidation operations in Caracas, Barquisimeto, and Valencia in order to implement the government's preventive repression under emergency authorities.<sup>iii</sup> Colectivos' presence will likely expand beyond areas currently under its control, extending state repression where formal security forces are absent.<sup>iv</sup>

- In early January 2026, the government imposed a state of emergency, restricting public assembly and ordering the arrest of those expressing support for regime change while pro-government militias “controlled by” Cabello established checkpoints in Caracas, according to a reliable second-hand reporting from conflict-event analysis and international media, corroborated by first-hand video footage.<sup>v</sup>
- Since early January 2026, colectivos in Caracas have patrolled on motorcycles with assault rifles, established vehicle checkpoints, and demanded access to residents' phones to search for “anti-government activity,” according to a body of sources, including on-the-ground international media reporting with direct access to Caracas residents, corroborated by first-hand video footage and second-hand civilian testimony.<sup>vi</sup>
- One colectivo member described the militia's mobilization to rapidly coordinate territorial control across their district, even though they did not anticipate the leadership transition, according to a public television news segment by a reliable international broadcaster with first-hand access to colectivo members.<sup>vii</sup>

***We assess with moderate confidence that the Venezuelan colectivos' alignment with hardline Chavista politicians will limit the authority of acting president Delcy Rodríguez over the next 3-6 months.<sup>viii</sup>*** Colectivo units will likely respond to Cabello's mobilization signals rather than Rodríguez's.<sup>ix</sup> This gives Cabello power to push back on reforms departing from Chavista principles, such as strict state control over key economic sectors, including the petroleum industry, and opposition to what he frames as Western imperialism.<sup>x</sup> Colectivo loyalty to Cabello will likely strengthen hardline factions within the regime, reducing Rodríguez's capacity to advance economic and political reforms without risking a factional break.<sup>xi</sup>

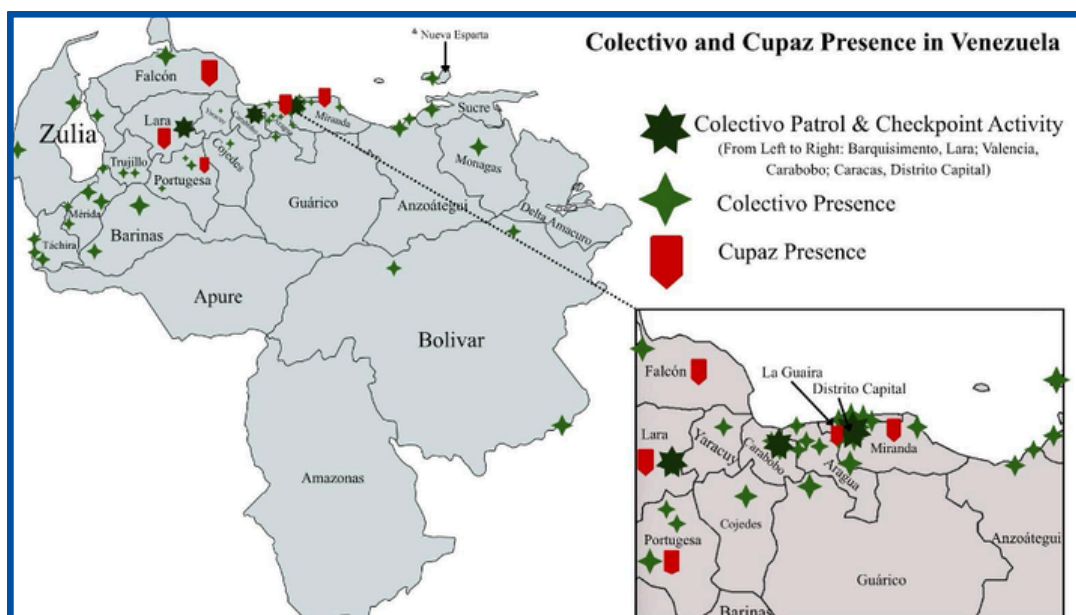
- Cabello addressed armed *colectivo* members on the night of Nicolás Maduro's removal and called on them to “mobilize” and remain on alert. *Colectivo* social media accounts referred to Cabello as their “captain” and tagged his official social media account, according to first-hand footage from a major regional newspaper corroborated by posts from *colectivo*-affiliated social media accounts.<sup>xii</sup>
- On 18 March 2026, Rodríguez replaced 12-year Defense Minister Vladimir Padrino López with General Gustavo González López, a former head of the Bolivarian National Intelligence Service (Servicio Bolivariano de Inteligencia Nacional – Sebin). Rodríguez initially wanted to retain the Defense Minister for military stability, but he faced increasing discontent from within the military. However, Rodríguez's chosen replacement, General González López, began his government career under Cabello and is also a longtime Chavista and Cabello loyalist, according to two second-hand sources with Caracas-based reporting and local access, corroborated by a first-hand official statement.<sup>xiii</sup>
- On 7 January 2026, Cabello urged Venezuelans to mobilize in support of the regime, framing the call as a response to external aggression. *Colectivo* members embraced his call for organized mobilization, according to first-hand statements on Cabello's government broadcast channel, a source with first-hand access who seeks to influence as well as inform.<sup>xiv</sup>



## Western Hemisphere: Transnational Threats

*We assess with moderate confidence that colectivos and affiliated formations will leverage their political connections to control fuel access and subsidized food distribution in the next 3-6 months, thereby increasing extortion and black-market sales in areas they control.*<sup>xv</sup> Venezuela distributes fuel and food through state-subsidized, locally managed programs.<sup>xvi</sup> Colectivos and “Peace Defender Squads” (Cuadrillas Defensoras de la Paz –Cupaz ) networks have direct organizational ties to the United Socialist Party of Venezuela (PSUV) leadership, governors, and mayors.<sup>xvii</sup> Control over these distribution points will likely give colectivos increased economic leverage and a continued recruitment tool, since access to subsidized goods incentivizes community participation in colectivo networks.<sup>xviii</sup>


- Since early 2021, in Lara state, Cupaz has assumed control of public services and reported intelligence to Sebin, and police Special Action Forces (Fuerzas de Acciones Especiales – Faes,) according to an organized-crime investigation with first-hand access across ten Venezuelan states.<sup>xix</sup>
- Colectivos use connections to the police, military, and politicians to access subsidized food schemes and sell low-cost food illegally at higher prices in neighborhoods they control. These connections also allow them to extort civilians and seize property with impunity, according to an organized crime analysis with second-hand access and a reliable track of reporting on Latin America.<sup>xx</sup>
- Since early 2021, Colectivos and Cupaz-linked groups in Lara and Portuguesa states have exploited subsidized fuel distribution by charging drivers to skip lines, reselling gasoline at inflated prices, and selling access to weekly fuel purchases, according to a body of sources including a report on illicit economies with second-hand access that compiles local accounts and documentation.<sup>xxi</sup>



*Colectivo activity spans all major Venezuelan states, with concentration in urban centers including Caracas, Barquisimeto, and Valencia, and documented presence along western and southern corridors* Graphic created by: MapChart.<sup>xxii</sup>



# Western Hemisphere: Transnational Threats

 **Venezuelan Colectivos: Coercion, Control, and Criminal Economies**

**Who They Are**


- Mobile militia forces operating like criminal gangs
- Members experience material benefits for participation
- Founded by Chavez government to target political opposition, now operating semi-independently
- Sworn loyalty to Interior Minister Diosdado Cabello
- Clothing obscures identity and highlights Chavismo ideology
- Use of civilian vehicles like trucks and motorcycles

**Enforcement Tactics**

- Armed motorcycle patrols
- Ad hoc vehicle checkpoints
- Phone inspections
- Armed presence at commercial nodes in cities

**Fundraising Methods**

- Diverting subsidized fuel and food for black-market resale
- Imposing informal security fees on citizens
- Controlling access to state-subsidized goods



**Activities:** Extortion, Drug Trafficking, Kidnapping, Robbery, Hired Killings, Illegal Food Sales, Trespassing, Fuel/Food Diversion

*Colectivos conduct armed coercive operations across urban neighborhoods while diverting state-subsidized goods for black-market resale, generating revenue streams that sustain recruitment and territorial control. Graphic generated by: ChatGPT.<sup>xxviii</sup>*

## Source Summary Statement

We assess with moderate confidence that this body of evidence is credible. This assessment draws on a body of sources that combines data on organized crime violence and actors, specialist organized crime analysis, international journalism, social media intelligence (SOCMINT), and think tank reporting. Sources with second-hand access, including datasets, NGOs, and journalists, standardize multiple reports of political violence, extortion, and other activities, but often rely on Venezuela's heavily censored media environment, which limits data collection. Specialist organized crime outlets, research organizations, and think tanks share these constraints but incorporate field expertise from regional scholars. SOCMINT derives from Instagram accounts affiliated with colectivos, collected via Tor Browser with an active VPN without account sign-in. Google Gemini identified relevant search keywords, including "cupaz," short for Cuadrillas de Paz. First-hand sources, such as interviews and on-the-ground reporting, may overrepresent voices and incidents that are safer to document, while underreporting areas where intimidation, access constraints, or censorship prevent people from speaking or reporters from verifying events. The most analytically reliable evidence comes from corroboration across structured event data and consistent descriptions across multiple independent reporting streams rather than isolated testimony or single-outlet accounts.



# Western Hemisphere: Transnational Threats

## Notes

<sup>i</sup> Tizano Breda | <https://acleddata.com/qa/qa-how-stable-post-maduro-venezuela> | “Q&A: How stable is post-Maduro Venezuela?” | 12 January 2026 | Reliable independent conflict-event dataset; second-hand access via Venezuelan in-country sources; censorship limits coverage. ; Venezuela Investigative Unit | <https://insightcrime.org/news/the-colectivos-role-in-the-struggle-for-power-in-post-maduro-venezuela/> | “The Colectivos’ Role in the Struggle for Power in Post-Maduro Venezuela” | 9 January 2026 | Reliable nonprofit specializing in Latin American organized crime; third-hand access via secondary sources; Maria de los Angeles Graterol and Rory Carroll | <https://www.theguardian.com/world/2026/jan/07/caracas-venezuela-paramilitary-groups> | “Armed militias deployed in Venezuela as regime attempts to impose authority” 6 January 2026

<sup>ii</sup> InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | “Rise of the Criminal Hybrid State in Venezuela” | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | “Maduro’s Peace Defender Squads Are Anything But Peaceful” | 12 July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/news/the-colectivos-role-in-the-struggle-for-power-in-post-maduro-venezuela/> | “The Colectivos’ Role in the Struggle for Power in Post-Maduro Venezuela” | 9 January 2026 ; France 24 | <https://www.france24.com/en/live-news/20250108-venezuela-s-colectivos-ready-to-pounce-as-opposition-plans-protest> | “Venezuela’s ‘colectivos’ ready to pounce as opposition plans protest” | 8 January 2025 | Reliable French public broadcaster; high access via direct colectivo and opposition interviews. ; NPR’s International Desk | <https://www.npr.org/2026/02/05/nx-s1-5697059/venezuela-delcy-rodriguez-maduro> | “A month after Maduro’s fall, Venezuela is under the gun to reform” | 6 February 2026 | Reliable U.S. nonprofit radio; high access via on-the-ground Caracas reporting and official interviews.

<sup>iii</sup> Tizano Breda | <https://acleddata.com/qa/qa-how-stable-post-maduro-venezuela> | “Q&A: How stable is post-Maduro Venezuela?” | 12 January 2026 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | “Maduro’s Peace Defender Squads Are Anything But Peaceful” | 12 July 2023 ; NPR’s International Desk | <https://www.npr.org/2026/02/05/nx-s1-5697059/venezuela-delcy-rodriguez-maduro> | “A month after Maduro’s fall, Venezuela is under the gun to reform” | 6 February 2026

<sup>iv</sup> Tizano Breda | <https://acleddata.com/qa/qa-how-stable-post-maduro-venezuela> | “Q&A: How stable is post-Maduro Venezuela?” | 12 January 2026 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | “Maduro’s Peace Defender Squads Are Anything But Peaceful” | 12 July 2023 ; France 24 | <https://www.france24.com/en/live-news/20250108-venezuela-s-colectivos-ready-to-pounce-as-opposition-plans-protest> | “Venezuela’s ‘colectivos’ ready to pounce as opposition plans protest” | 8 January 2025 | Reliable French public broadcaster; high access via direct colectivo and opposition interviews. ; Florantonia Singer and María Martín / El País América | <https://elpais.com/america/2026-03-18/el-chavismo-destituye-a-vladimir-padrino-como-ministro-de-defensa.html> | “El chavismo destituye a Vladimir Padrino como ministro de Defensa” [“Chavismo removes Vladimir Padrino as Defense Minister”] | 18 March 2026 ; Antonio Guterres | <https://press.un.org/en/2026/sgsm22974.doc.htm> | “‘Power of Law’ Must Prevail in Venezuela, Secretary-General Tells Security Council, Citing Heightened Risk of Regional Instability” | 5 January 2026 | UN Secretary-General statement to Security Council; low access, relaying publicly available events.

<sup>v</sup> Tizano Breda | <https://acleddata.com/qa/qa-how-stable-post-maduro-venezuela> | “Q&A: How stable is post-Maduro Venezuela?” | 12 January 2026 ; Luke Cooper and Annika Burgess | <https://www.abc.net.au/news/2026-01-30/venezuelan-armed-groups-could-challenge-us-recovery-plan/106207132> | “The US wants to control Venezuela’s finances. These armed groups could make it difficult” | 29 January 2026 ; Maria de los Angeles Graterol and Rory Carroll | <https://www.theguardian.com/world/2026/jan/07/caracas-venezuela-paramilitary-groups> | “Armed militias deployed in Venezuela as regime attempts to impose authority” 6 January 2026



# Western Hemisphere: Transnational Threats

## Notes

<sup>vi</sup> Cupaz Moran | <https://www.instagram.com/cupazmoran/> | Instagram post | 14 December 2025 ; Cupaz 4F | [https://www.instagram.com/cupaz\\_4f/](https://www.instagram.com/cupaz_4f/) | Instagram post | 14 December 2025 ; Maria de los Angeles Graterol and Rory Carroll | <https://www.theguardian.com/world/2026/jan/07/caracas-venezuela-paramilitary-groups> | “Armed militias deployed in Venezuela as regime attempts to impose authority” 6 January 2026 ; Deutsche Welle News | <https://www.facebook.com/deutschewellenews/videos/colectivos-maduros-paramilitary-groups-on-alert-in-venezuela/1586582432684626/> | Facebook post. | 8 January 2026 ; Venezuela Investigative Unit | <https://insightcrime.org/news/the-colectivos-role-in-the-struggle-for-power-in-post-maduro-venezuela/> | “The Colectivos’ Role in the Struggle for Power in Post-Maduro Venezuela” | 9 January 2026 ; Lilia Luciano | <https://www.facebook.com/CBSEveningNews/videos/armed-patrols-on-the-streets-of-caracas-in-wake-of-the-capture-and-arrest-of-mad/733335993167744/> | Facebook post | 6 January 2026

<sup>vii</sup> France 24 Español | <https://www.youtube.com/watch?v=mBdEJYaZREc> | “Venezuela: colectivos armados buscan responsables de la ‘traición’ que llevó a la captura de Maduro” | 10 January 2026

<sup>viii</sup> Tizano Breda | <https://acleddata.com/qa/qa-how-stable-post-maduro-venezuela> | “Q&A: How stable is post-Maduro Venezuela?” | 12 January 2026 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | “Maduro’s Peace Defender Squads Are Anything But Peaceful” | 12 July 2023 ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | “Rise of the Criminal Hybrid State in Venezuela” | July 2023

<sup>ix</sup> Tizano Breda | <https://acleddata.com/qa/qa-how-stable-post-maduro-venezuela> | “Q&A: How stable is post-Maduro Venezuela?” | 12 January 2026 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | “Maduro’s Peace Defender Squads Are Anything But Peaceful” | 12 July 2023 ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | “Rise of the Criminal Hybrid State in Venezuela” | July 2023

<sup>x</sup> InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | “Rise of the Criminal Hybrid State in Venezuela” | July 2023 ; France 24 | <https://www.france24.com/en/live-news/20250108-venezuela-s-colectivos-ready-to-pounce-as-opposition-plans-protest> | “Venezuela’s ‘colectivos’ ready to pounce as opposition plans protest” | 8 January 2025 ; Tibisay Zea / The World | <https://theworld.org/stories/2026/02/24/a-look-inside-venezuelas-colectivos-as-the-country-faces-an-uncertain-transition> | “A look inside Venezuela’s colectivos as the country faces an uncertain transition” | 24 February 2026

<sup>xi</sup> Tizano Breda | <https://acleddata.com/qa/qa-how-stable-post-maduro-venezuela> | “Q&A: How stable is post-Maduro Venezuela?” | 12 January 2026 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | “Maduro’s Peace Defender Squads Are Anything But Peaceful” | 12 July 2023 ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | “Rise of the Criminal Hybrid State in Venezuela” | July 2023

<sup>xii</sup> La Tercera | <https://www.instagram.com/reels/DTDqicDiJkq/> | Instagram post | 3 January 2026 ; Maria de los Angeles Graterol and Rory Carroll | <https://www.theguardian.com/world/2026/jan/07/caracas-venezuela-paramilitary-groups> | “Armed militias deployed in Venezuela as regime attempts to impose authority” 6 January 2026 ; Cupaz Moran | <https://www.instagram.com/cupazmoran/> | Instagram post | 14 December 2025 ; Cupaz 4F | [https://www.instagram.com/cupaz\\_4f/](https://www.instagram.com/cupaz_4f/) | Instagram post | 14 December 2025



# Western Hemisphere: Transnational Threats

## Notes

<sup>xiii</sup> Reuters / NBC News | <https://www.nbcnews.com/world/venezuela/venezuelas-acting-president-replaces-long-time-defense-minister-rcna264159> | "Venezuela's acting president replaces long-time defense minister with intelligence head" | 18 March 2026 ; Florantonia Singer and María Martín / El País América | <https://elpais.com/america/2026-03-18/el-chavismo-destituye-a-vladimir-padrino-como-ministro-de-defensa.html> | "El chavismo destituye a Vladimir Padrino como ministro de Defensa" ["Chavismo removes Vladimir Padrino as Defense Minister"] | 18 March 2026 ; Delcy Rodríguez | <https://x.com/delcyrodriguez/status/2034321837543333995> | "Informo al país que hoy he designado al G/J Gustavo González López como Ministro del Poder Popular para la Defensa." ["I inform the country that today I have appointed General Gustavo González López as Minister of Popular Power for Defense."] | 18 March 2026  
<sup>xiv</sup> Con el Mazo Dando (Diosdado Cabello, host) | <https://www.youtube.com/watch?v=93Mth0sjiFg> | Episode aired 7 January 2026 ; Con el Mazo Dando (Diosdado Cabello, host) | <https://www.youtube.com/watch?v=2OSBMNKUCbA> | Episode aired 14 January 2026

<sup>xv</sup> Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | "Maduro's Peace Defender Squads Are Anything But Peaceful" | 12 July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/news/the-colectivos-role-in-the-struggle-for-power-in-post-maduro-venezuela/> | "The Colectivos' Role in the Struggle for Power in Post-Maduro Venezuela" | 9 January 2026 ; Transparencia Venezuela | <https://transparenciave.org/economias-ilicitas/cuadrillas-de-paz-red-elco-y-fuerzas-especiales-civico-militares-patria-nueva/> | June 2022

<sup>xvi</sup> TheWorld | <https://theworld.org/segments/2026/01/29/inside-venezuelas-armed-colectivos> | "Inside Venezuela's armed Colectivos" | 29 January 2026 ; Antonio Guterres | <https://press.un.org/en/2026/sgsm22974.doc.htm> | "Power of Law' Must Prevail in Venezuela, Secretary-General Tells Security Council, Citing Heightened Risk of Regional Instability" | 5 January 2026 | UN Secretary-General statement to Security Council; low access, relaying publicly available events.

<sup>xvii</sup> Tizano Breda | <https://acleddata.com/qa/qa-how-stable-post-maduro-venezuela> | "Q&A: How stable is post-Maduro Venezuela?" | 12 January 2026 | Reliable independent conflict-event dataset; second-hand access via Venezuelan in-country sources; censorship limits coverage ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | "Maduro's Peace Defender Squads Are Anything But Peaceful" | 12 July 2023

<sup>xviii</sup> Transparencia Venezuela | <https://transparenciave.org/economias-ilicitas/cuadrillas-de-paz-red-elco-y-fuerzas-especiales-civico-militares-patria-nueva/> | June 2022 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | "Maduro's Peace Defender Squads Are Anything But Peaceful" | 12 July 2023 ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/news/the-colectivos-role-in-the-struggle-for-power-in-post-maduro-venezuela/> | "The Colectivos' Role in the Struggle for Power in Post-Maduro Venezuela" | 9 January 2026

<sup>xix</sup> Transparencia Venezuela | <https://transparenciave.org/economias-ilicitas/cuadrillas-de-paz-red-elco-y-fuerzas-especiales-civico-militares-patria-nueva/> | June 2022 ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023



# Western Hemisphere: Transnational Threats

## Notes

<sup>xx</sup> Transparencia Venezuela | <https://transparenciave.org/economias-ilicitas/cuadrillas-de-paz-red-elco-y-fuerzas-especiales-civico-militares-patria-nueva/> | June 2022 ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | "Maduro's Peace Defender Squads Are Anything But Peaceful" | 12 July 2023 | ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/news/the-colectivos-role-in-the-struggle-for-power-in-post-maduro-venezuela/> | "The Colectivos' Role in the Struggle for Power in Post-Maduro Venezuela" | 9 January 2026

<sup>xxi</sup> Transparencia Venezuela | <https://transparenciave.org/economias-ilicitas/cuadrillas-de-paz-red-elco-y-fuerzas-especiales-civico-militares-patria-nueva/> | June 2022 ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | "Maduro's Peace Defender Squads Are Anything But Peaceful" | 12 July 2023 | ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/news/the-colectivos-role-in-the-struggle-for-power-in-post-maduro-venezuela/> | "The Colectivos' Role in the Struggle for Power in Post-Maduro Venezuela" | 9 January 2026

<sup>xxii</sup> Tizano Breda | <https://acleddata.com/qa/qa-how-stable-post-maduro-venezuela> | "Q&A: How stable is post-Maduro Venezuela?" | 12 January 2026 | Reliable independent conflict-event dataset; second-hand access via Venezuelan in-country sources; censorship limits coverage. ; Transparencia Venezuela | <https://transparenciave.org/economias-ilicitas/cuadrillas-de-paz-red-elco-y-fuerzas-especiales-civico-militares-patria-nueva/> | June 2022 ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | "Maduro's Peace Defender Squads Are Anything But Peaceful" | 12 July 2023 | ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/news/the-colectivos-role-in-the-struggle-for-power-in-post-maduro-venezuela/> | "The Colectivos' Role in the Struggle for Power in Post-Maduro Venezuela" | 9 January 2026

<sup>xxiii</sup> Transparencia Venezuela | <https://transparenciave.org/economias-ilicitas/cuadrillas-de-paz-red-elco-y-fuerzas-especiales-civico-militares-patria-nueva/> | June 2022 ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/investigations/maduro-peace-defender-squads-anything-peaceful/> | "Maduro's Peace Defender Squads Are Anything But Peaceful" | 12 July 2023 | ; InSight Crime Venezuela Investigative Unit | <https://insightcrime.org/wp-content/uploads/2023/07/Rise-of-the-Criminal-Hybrid-State-in-Venezuela-InSight-Crime-1.pdf> | "Rise of the Criminal Hybrid State in Venezuela" | July 2023 ; Venezuela Investigative Unit | <https://insightcrime.org/news/the-colectivos-role-in-the-struggle-for-power-in-post-maduro-venezuela/> | "The Colectivos' Role in the Struggle for Power in Post-Maduro Venezuela" | 9 January 2026 ; Tibisay Zea / The World | <https://theworld.org/stories/2026/02/24/a-look-inside-venezuelas-colectivos-as-the-country-faces-an-uncertain-transition> | "A look inside Venezuela's colectivos as the country faces an uncertain transition" | 24 February 2026 ; Maria de los Angeles Graterol and Rory Carroll | <https://www.theguardian.com/world/2026/jan/07/caracas-venezuela-paramilitary-groups> | "Armed militias deployed in Venezuela as regime attempts to impose authority" | 6 January 2026



# Rising Practitioners



## China's Maritime Assertiveness and Diplomatic Framing Likely to Increase in the Next 3-6 Months

Author: Brooklind Norman

Editors: Hayley Page, Corey Black, Connor Colford, Vrin Giritharan, Katherine Millet, Julie Ferringer

*We assess the risk of a serious maritime incident involving China, the Philippines, and Vietnam will likely increase over the next 3–6 months, driven by intensifying Chinese coast guard and maritime militia patrols, overlapping territorial enforcement actions, and the continued absence of binding de-escalation mechanisms.* Continued close-proximity operations between Chinese coast guard vessels, maritime militia forces, and the coast guards or naval units of rival claimant states raise the probability of tactical miscalculation. These actors frequently operate near contested reefs, shoals, and resupply routes, conditions conducive to vessel collisions, aggressive maneuvering, or water-cannon incidents. Despite this heightened operational friction, all parties will likely retain strong incentives to avoid deliberate escalation due to economic interdependence and the strategic risks associated with armed conflict.<sup>i</sup>

- The Declaration on the Conduct (DOC), signed by the Association of Southeast Asian Nations (ASEAN) member states and the People's Republic of China, provides general behavioral guidelines intended to reduce tensions and encourage peaceful dispute management. However, the agreement lacks enforcement mechanisms or binding operational rules governing maritime encounters, according to an international environmental knowledge platform that provides authoritative, though second-hand, information.<sup>ii</sup>
- Disagreements over the proposed Code of Conduct's (COC) legal status, geographic scope, and enforcement provisions remain unresolved. As a result, maritime interactions among claimant states continue to rely on ad hoc signaling and informal practices rather than formalized rules, according to analysis from a Singapore-based regional news outlet known for its reliable reporting on Southeast Asian political and security affairs.<sup>iii</sup>
- Historical timelines show repeated South China Sea disputes between Chinese maritime forces and vessels from Southeast Asian claimant states. These incidents frequently involve aggressive maneuvering, shadowing operations, or obstruction of resupply missions. Despite these confrontations, most incidents historically have stopped short of armed escalation, according to a U.S.-based foreign policy think tank, widely cited for its reliable research on international security and global governance.<sup>iv</sup>





*We assess that in the next 3-6 months, China will very likely intensify diplomatic and information campaigns portraying itself as a stabilizing actor while attributing escalation to rival claimants or external powers, providing Beijing with the political narrative necessary to justify its own continued maritime assertiveness as defensive in nature.* In the context of stalled negotiations over a binding South China Sea COC between China and ASEAN, Beijing frequently frames the lack of progress as the result of unilateral provocations by rival claimants and interference by extra-regional actors, particularly the United States. Chinese officials argue that South China Sea disputes should be addressed through regional dialogue and bilateral engagement rather than external involvement or the internationalization of disputes.<sup>v</sup> Within this narrative, Beijing portrays its own actions as consistent with stability and continued negotiations while attributing rising maritime tensions to rival claimants and U.S. involvement in regional security activities.<sup>vi</sup> This likely reflects Beijing's intent to legitimize its maritime presence, reinforce its narrative of responsible behavior, and influence regional and international perceptions to deter external involvement.<sup>vii</sup>

- China continues to emphasize continued dialogue with the ASEAN member states and supports the implementation of the DOC, which includes commitments to conduct consultations, notify other claimants of planned maritime activities, and manage incidents at sea peacefully. China has repeatedly emphasized consultation-based negotiations and multilateral dialogue with ASEAN member states as the preferred framework for managing South China Sea disputes, according to official government statements that offer insight into Beijing's intentions but are likely strategic narrative framing.<sup>viii</sup>
- China's diplomatic rhetoric emphasizes restraint and stability while maintaining a continuous operational presence through patrols, maritime law enforcement, and other routine activities in disputed areas, according to expert commentary reported by a Hong Kong-based newspaper that provides regional reporting informed by subject-matter experts, though the coverage offers interpretive, second-hand analysis.<sup>ix</sup>

*We assess that in the next 3-6 months the COC negotiation stalemate will likely exacerbate divisions within ASEAN by widening differences between South China Sea claimant and non-claimant states over maritime security priorities and relations with China.* Claimant states, such as the Philippines and Vietnam, generally support stronger language and binding provisions in a COC to constrain coercive maritime behavior. In contrast, several non-claimant ASEAN members prioritize economic cooperation and stable diplomatic relations with China. As the ASEAN chair in 2026, the Philippines will likely continue pushing for progress on the COC, but prolonged internal divisions within ASEAN are likely to deepen differences and limit the organization's ability to adopt unified messaging.<sup>x</sup>

- ASEAN officials continue to acknowledge ongoing challenges in reaching consensus on South China Sea issues, according to public statements from ASEAN, providing first-hand insight into ASEAN's collective positions.<sup>xi</sup> For example, ASEAN joint communiqués have noted the need for "continued efforts" to achieve agreement on a COC, while statements from individual member states have emphasized differing national approaches to maritime disputes and external partnerships, according to analysis from an Asia-Pacific current affairs publication that offers insights informed by regional experts, though its reporting is interpretive and second-hand.<sup>xii</sup>
- The Philippines has publicly emphasized the need to accelerate negotiations and maintain momentum toward concluding the COC. Philippine officials have highlighted the urgency of addressing maritime incidents in the South China Sea and have called for a legally binding agreement grounded in international law, according to public statement from Philippine officials, which provides first-hand insight into the national policy priorities of a claimant state directly involved in maritime disputes.<sup>xiii</sup>
- Ongoing negotiations over a COC require agreement on sensitive issues such as legal scope, enforcement mechanisms, and the role of external actors - areas where member states have demonstrated differing priorities. As these negotiations progress, they force more explicit positions from member states, making divisions within ASEAN more pronounced, according to a reliable China-focused policy platform specializing in strategic interpretation of regional political developments and analysis on expert commentary and regional sources.<sup>xiv</sup>



## Source Summary Statement

The evidentiary basis for these assessments consists primarily of official ASEAN and Chinese government statements, regional media reporting, and academic and policy analysis on South China Sea negotiations and maritime security dynamics. These sources provide credible insight into diplomatic messaging, negotiation obstacles, and the broader strategic environment shaping the Code of Conduct discussions, though they are occasionally biased by historical tensions among countries. However, intelligence gaps remain regarding internal ASEAN deliberations, Chinese strategic planning, and operational decision-making by maritime forces operating in contested waters. As a result, the available open-source reporting provides stronger insight into diplomatic positioning than into tactical maritime intentions. Our overall confidence in the evidentiary base is moderate.

## Notes

<sup>i</sup> Craig Singleton and Reece Breaux | <https://www.fdd.org/analysis/2024/07/10/newly-enforced-chinese-coast-guard-law-heightens-maritime-miscalculation-risks/>

<sup>ii</sup> IW:LEARN | <https://iwlearn.net/documents/legal-frameworks/south-china-sea> | Legal Frameworks for the South China Sea | n.d. | Background overview of legal frameworks such as DOC and UNCLOS. Legal Frameworks for the South China Sea

<sup>iii</sup> Channel News Asia | <https://www.channelnewsasia.com/asia/philippines-south-china-sea-code-talks-asean-bloc-5912126> | Philippines aims to wrap up talks on South China Sea code | n.d. | Regional reporting on negotiation dynamics and diplomatic efforts.

<sup>iv</sup> Council on Foreign Relations | <https://www.cfr.org/timelines/chinas-maritime-disputes> | China's Maritime Disputes Timeline | 22 May 2024 | China's Maritime Disputes Timeline | Strategic timeline documenting maritime incidents and disputes.

<sup>v</sup> Ministry of Foreign Affairs of the People's Republic of China | [https://www.fmprc.gov.cn/eng/xw/wjbxw/202604/t20260402\\_11885319.html](https://www.fmprc.gov.cn/eng/xw/wjbxw/202604/t20260402_11885319.html) | China and the Philippines Hold the Eleventh Meeting of the Bilateral Consultation Mechanism on the South China Sea | 28 March 2026 | Official government press release detailing Beijing's demands for bilateral resolution and its protests against "maritime infringement" and "vilification" by rival claimants.

<sup>vi</sup> Ministry of Foreign Affairs of the People's Republic of China | [https://www.fmprc.gov.cn/eng/wjzbzd/202603/t20260308\\_11870562.html](https://www.fmprc.gov.cn/eng/wjzbzd/202603/t20260308_11870562.html) | Foreign Minister Wang Yi Meets the Press | 08 March 2026 | Official government transcript of a high-level press conference detailing Beijing's diplomatic framing of maritime stability and its perspective on the role of the Chinese Coast Guard in the South China Sea.

<sup>vii</sup> South China Sea Probing Initiative | <https://www.scspi.org/en/dtfx/building-new-narrative-south-china-sea> | "Building a New Narrative for the South China Sea" | 25 August 2025 | Analysis reflecting Chinese policy messaging emphasizing stability, cooperation, and negotiation while promoting restraint and regional dialogue

<sup>viii</sup> Ministry of Foreign Affairs of the People's Republic of China | [https://www.fmprc.gov.cn/mfa\\_eng/xw/wjbxw/202601/t20260130\\_11848277.html](https://www.fmprc.gov.cn/mfa_eng/xw/wjbxw/202601/t20260130_11848277.html) | Statement on ASEAN–China Consultations on the South China Sea | 30 January 2026

<sup>ix</sup> South China Morning Post | <https://www.scmp.com/news/china/diplomacy/article/3345137/south-china-sea-expert-warns-2026-code-conduct-simply-not-achievable> | South China Sea expert warns 2026 Code of Conduct is 'simply not achievable' | 02 March 2026 | Expert commentary evaluating feasibility of concluding the COC.

<sup>x</sup> Parich Pattayakorn | <https://hdf.org/will-the-philippines-succeed-at-finalizing-the-code-of-conduct-in-the-south-china-sea-as-asean-chair-in-2026/> | "Will the Philippines Succeed at Finalizing the Code of Conduct in the South China Sea as ASEAN Chair in 2026?" | 19 March 2026 | Analysis of ASEAN internal fragmentation, competing member state interests, and challenges to advancing a unified Code of Conduct agenda under Philippine



## Notes

<sup>xi</sup> ASEAN | <https://asean.org/wp-content/uploads/2026/01/FINAL-Press-Statement-by-the-Chair-of-the-ASEAN-Foreign-Ministers-Retreat.pdf> | Press Statement by the Chair of the ASEAN Foreign Ministers' Retreat | 29 January 2026 | Official ASEAN document outlining negotiation priorities.

<sup>xii</sup> Nguyen Minh Quang | <https://thediplomat.com/2019/06/saving-the-china-asean-south-china-sea-code-of-conduct/> | "Saving the China-ASEAN South China Sea Code of Conduct" | 01 June 2019 | Analysis of ASEAN-China COC negotiations highlighting intra-ASEAN differences and challenges to consensus

<sup>xiii</sup> Government of the Philippines | <https://asean2026.gov.ph/post/view/?title=philippines-as-asean-chair-to-facilitate-continued-progress-and-endeavor-to-conclude-south-china-sea-code-of-conduct-in-2026> | Philippines as ASEAN Chair to Facilitate Continued Progress on South China Sea Code of Conduct | 28 January 2026 | Government statement outlining diplomatic priorities.

<sup>xiv</sup> ThinkChina | <https://www.thinkchina.sg/politics/philippines-asean-chairmanship-comes-perilous-time> | ASEAN Chair Philippines Faces Challenges in South China Sea COC Negotiations | 09 February 2026 | Regional strategic analysis of ASEAN internal divisions.



# Japan Likely to Assert Increased Security Leadership in the Indo-Pacific Within the Next Six Months

Author: Connor Colford

Editors: Hayley Page, Corey Black, Vrin Giritharan, Katherine Millet, Julie Ferringer

*We assess Japan will likely boost its defense industry's production capabilities within the next six months, focusing on increased arms exports to better its international defense cooperation and domestic procurement capabilities.*

Japan's arms exports have historically faced restrictions in line with Japan's pacifist constitution. In 2014 "The Three Principles on Transfer of Defense Equipment and Technology" eased those restrictions, allowing limited arms exports to goods that fall within five non-lethal categories: rescue, transport, warning, surveillance, or minesweeping.<sup>i</sup> But it prohibits exports to countries involved in conflict or those that violate international agreements.<sup>ii</sup> Loosening these restrictions to improve Japan's domestic defense industry's production has been a policy priority of the ruling Liberal Democratic Party-Japan Innovation Party (LDP-JIP) coalition since its formation in October 2025 as it seeks to improve Japan's ability to act independently in response to regional and international security developments.<sup>iii</sup>

- Japan's cabinet approved a record defense budget of ¥9 trillion (\$58 billion USD) in December 2025, according to a second-hand source with a reliable track record covering Japanese defense issues. Portions of this budget allocated funds for efforts to bolster defense production, including the domestic purchase of Japanese-produced materiel and international cooperation on the joint development of new equipment.<sup>iv</sup>
- On 6 March 2026, ruling coalition officials submitted a proposal to the Prime Minister's Office that recommended abolishing lethal arms export restrictions. The proposal would limit lethal arms exports to countries with which Japan has formal defense sharing agreements, though exports to other countries could still occur under special circumstances, according to a second-hand source with a reliable track record covering Japanese defense.<sup>v</sup>
- Defense Minister Shinjiro Koizumi was planning to meet with Filipino and Indonesian defense ministers on matters pertaining to Japanese defense exports, including Filipino interest in Japanese Abukuma-class frigates, according to a second-hand source with a reliable track record reporting on Japanese defense policy in March 2026. Koizumi was also going to meet with the Australian defense minister regarding Australia's purchase of several Mogami-class frigates.<sup>vi</sup>

*We assess Japan will also likely shift towards a more active security stance in the Indo-Pacific in the next six months to better counter regional Chinese actions and influence, through enhancing its offensive intelligence collection capabilities and revising its core national security strategy documents.* Japan's intelligence community is currently divided amongst various government ministries with central authority vested in the Cabinet Intelligence and Research Office.<sup>vii</sup> Since Prime Minister Sanae Takaichi's February 2026 electoral victory, reforming Japan's intelligence community has emerged as a policy priority supported by a large majority of the National Diet's lower house.<sup>viii</sup> Defense Minister Koizumi and Prime Minister Sanae Takaichi have both expressed a desire to revise Japan's National Security Strategy, National Defense Strategy, and Defense Buildup Program, likely to bolster Japan's ability to respond to international security developments including aggressive actions by the People's Republic of China.<sup>ix</sup>

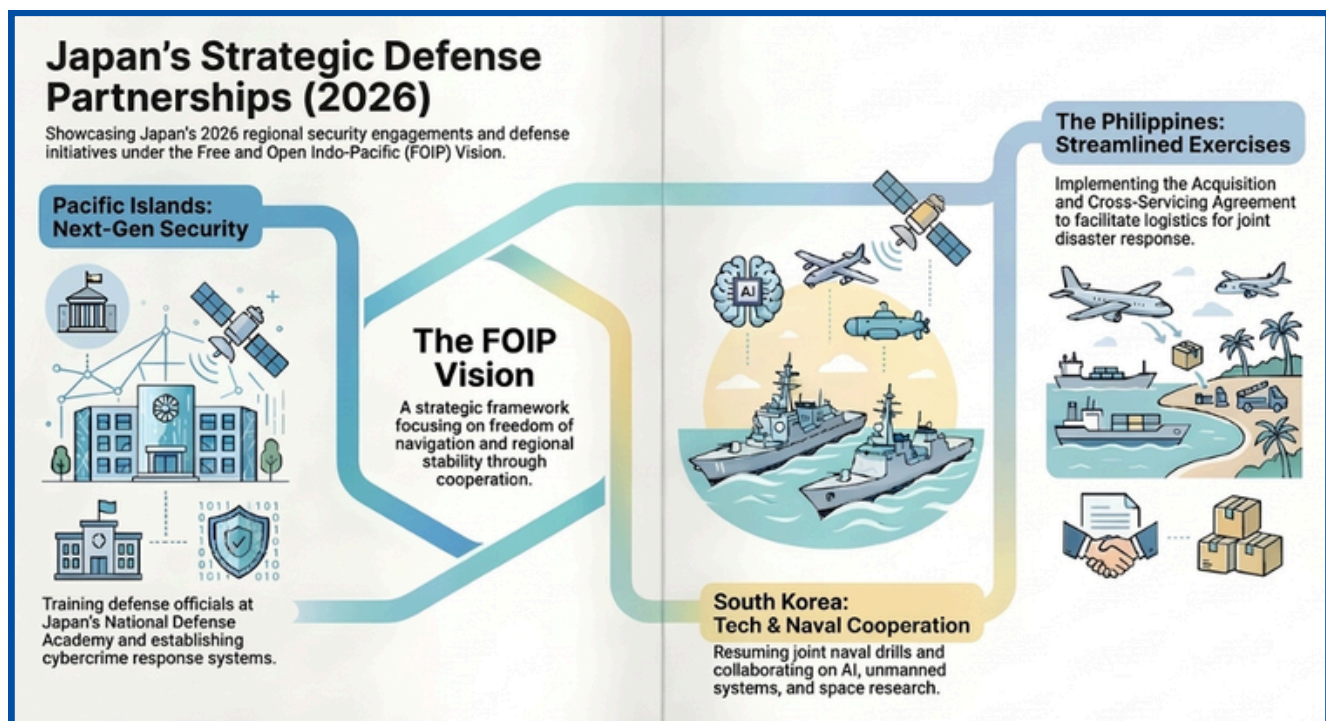
- In a speech to the National Diet on 20 February 2026, Prime Minister Takaichi emphasized that safeguarding Japan's national defense required the timely collection, coordination, and analysis of foreign intelligence. Takaichi identified that a centralized agency holding direct authority over intelligence operations was critical to achieving this objective.<sup>x</sup>
- On 26 February 2026, the ruling LDP government finalized a proposal for the creation of a central National Intelligence Agency and a National Intelligence Council chaired by the Prime Minister. The proposal additionally recommended a central platform for interagency intelligence sharing and increased counterintelligence measures, according to a second-hand source with a reliable track record reporting on Japanese national security issues.<sup>xi</sup>
- In March 2026 Japan's ruling government began planning to establish a panel of defense, cybersecurity, and space experts to review Japan's core national security documents in late April 2026, according to a body of second-hand sources with reliable track records covering Japanese national security policy. The panel would provide recommendations by May 2026 so that the government could present a formal proposal to the National Diet by summer 2026.<sup>xii</sup>



# Rising Practitioners

*We assess Japan will likely increase its engagement and defense ties with Indo-Pacific and Southeast Asian countries in the next six months to counter Chinese regional influence.* Japan has shaped its general strategy in the Indo-Pacific since 2016 on the Free and Open Indo-Pacific (FOIP) Vision. FOIP emphasizes securing major sea lanes, protecting freedom of navigation, and upholding regional stability through regional cooperation across joint exercises, equipment transfers, and increased ties between defense officials.<sup>xiii</sup> Prime Minister Takaichi argued in February 2026 that Japan should take a more active role in upholding international stability, particularly through expanding regional security and development assistance programs.<sup>xiv</sup>

- Defense Minister Koizumi hosted the Japan-Pacific Island Countries Defense Ministers' Meeting with 14 pacific island defense ministers in February 2026, according to a body of second-hand sources who have reported reliably on Japanese foreign and defense affairs. Koizumi introduced a program allowing pacific island defense officials to receive training from Japan's National Defense Academy and the creation of an international crisis response system to counter regional cybercrimes.<sup>xv</sup>
- In January 2026, Japan and South Korea agreed to resume joint search and rescue naval drills last held in 2017. Defense ministers of both countries agreed to increase personnel exchanges and cooperation on research related to AI, unmanned systems, and space, according to second-hand sources with reliable track records covering Japan-Korea defense cooperation.<sup>xvi</sup>
- Also in January 2026, Japan and the Philippines signed the Acquisition and Cross-Servicing Agreement, which removes certain regulations and taxes placed on supplies necessary for completing joint exercises. This streamlines the implementation of the Reciprocal Access Agreement, which allows both countries to deploy their militaries in the other's territory for joint exercises and disaster response, according to a second-hand source with a reliable track record covering Japan-Philippines defense cooperation.<sup>xvii</sup>



Graphic portraying Japan's Strategic Defense Partnerships.<sup>xviii</sup>



## Source Summary Statement

We make these assessments with moderate confidence, based on sources with second-hand access whose reporting has been corroborated by other second-hand or first-hand sources. The body of reporting is comprised primarily of sources with second-hand access reporting on policy developments and the activities of Japanese officials regarding Japanese defense and national security policies. These sources include reporting in English-language Japanese-run publications with a track record of accurately covering these issues, as well as analysis by academics or former officials with experience covering or working in the Indo-Pacific and with Japan specifically. The information provided in each source aligns with other sources found and included in this analysis. This body of reporting does include some sources with first-hand access, including Japanese government ministry websites describing current policies or official transcripts of Prime Minister Sanae Takaichi's speeches and statements. Despite the reliable track record of the sources used, the reliance on second-hand sources with a lack of significant direct first-hand access to Japanese government actions or plans represents an important intelligence gap in projecting outwards 3-6 months.

## Notes

<sup>i</sup> Mizuki Sato | <https://www.asahi.com/ajw/articles/16377896> | LDP approves major change to allow lethal weapons exports | 25 February 2026 | Credible and reliable reporting on Japanese defense industry and defense policy; Ministry of Foreign Affairs of Japan | [https://www.mofa.go.jp/fp/nsp/page1we\\_000083.html](https://www.mofa.go.jp/fp/nsp/page1we_000083.html) | The Three Principles on Transfer of Defense Equipment and Technology | 5 December 2023 | Japanese Foreign Ministry outlining The Three Principles on Transfer of Defense Equipment and Technology

<sup>ii</sup> Ministry of Foreign Affairs of Japan | [https://www.mofa.go.jp/fp/nsp/page1we\\_000083.html](https://www.mofa.go.jp/fp/nsp/page1we_000083.html) | The Three Principles on Transfer of Defense Equipment and Technology | 5 December 2023 | Japanese Foreign Ministry outlining The Three Principles on Transfer of Defense Equipment and Technology

<sup>iii</sup> Christopher B. Johnstone and Adam P. Liff | <https://www.csis.org/analysis/japans-present-and-future-national-security-strategy-five-key-challenges-watch> | Japan's Present and Future National Security Strategy: Five Key Challenges to Watch | 17 December 2025 | Second-hand, credible analysis by two experts on Indo-Pacific and Japanese security issues

<sup>iv</sup> Mari Yamaguchi | <https://apnews.com/article/japan-defense-spending-china-missile-221b2cb5da0760d6e07f63ac01deba93> | Japan's Cabinet OKs record defense budget that aims to deter China | 26 December 2025

<sup>v</sup> Masashi Yamaguchi and Takahito Higuchi | <https://japannews.yomiuri.co.jp/politics/defense-security/20260307-315085/> | Japanese Ruling Parties' Proposal on Defense Equipment Transfers Aims to Deepen Cooperation with Like-Minded Nations | 7 March 2026

<sup>vi</sup> Mizuki Sato and Ryo Kiyomaya | <https://www.asahi.com/ajw/articles/16413377> | Koizumi to push warship, radar exports during S.E. Asia trip | 11 March 2026

<sup>vii</sup> Cabinet Intelligence and Research Office | <https://www.cas.go.jp/jp/gaiyou/jimu/jyouthoutyousa/en/community.html> | Intelligence Community of Japan and CIRO | Undated | CIRO website describing the organization of the Japanese intelligence community

<sup>viii</sup> Sheila A. Smith | <https://www.cfr.org/articles/japans-2026-election-national-security> | Japan's 2026 Election: National Security | 6 February 2026 | Credible, reliable analysis on Japanese national security issues ahead of February 2026 election ; Jesse Johnson and Gabriel Dominguez | <https://www.japantimes.co.jp/news/2026/02/22/japan/politics/japan-takaichi-defense-security-goals/> | With fresh mandate, Japan's Takaichi sets sights on divisive security goals | 22 February 2026 | Credible, reliable reporting on the national security policy agenda of Prime Minister Sanae Takaichi's government



## Notes

<sup>ix</sup> Christopher B. Johnstone and Adam P. Liff | <https://www.csis.org/analysis/japans-present-and-future-national-security-strategy-five-key-challenges-watch> | Japan's Present and Future National Security Strategy: Five Key Challenges to Watch | 17 December 2025 | Second-hand, credible analysis by two experts on Indo-Pacific and Japanese security issues; Berk Kutay Gökmen | <https://www.aa.com.tr/en/asia-pacific/japan-to-revise-national-security-strategy-this-year-defense-chief-tells-munich-security-conference/3829702> | Japan to revise national security strategy this year: Defense chief tells Munich Security Conference | 14 February 2026 | Credible, reliable reporting of Japanese Defense Minister's remarks at the 2026 Munich Security Conference; Bonny Lin and Kristi Govella | <https://www.csis.org/analysis/escalating-japan-china-tensions-insights-past-and-prospects-future> | Escalating Japan-China Tensions: Insights from the Past and Prospects for the Future | 5 December 2025 | Second-hand, credible analysis by experts on China and Japan defense issues in the Indo-Pacific

<sup>x</sup> Prime Minister's Office of Japan | <https://japan.kantei.go.jp/105/statement/202602/20shiseihoshin.html> | Policy Speech by Prime Minister TAKAICHI Sanae to the 221st Session of the Diet | 20 February 2026

<sup>xi</sup> Haruka Suzuki | <https://www.asahi.com/ajw/articles/16384464> | Japan moves to bring intelligence agency functions under one roof | 27 February 2026

<sup>xii</sup> Nippon.com | <https://www.nippon.com/en/news/yjj2026030301002/> | Japan to Launch Panel on Security Documents in April | 3 March 2026; Masashi Yamaguchi and Higuchi Takahito | <https://japannews.yomiuri.co.jp/politics/politics-government/20260303-314335/> | LDP Starts Talks to Revise Japan's 3 Security Documents; Seeks to Adapt to Changing International Order | 3 March 2026

<sup>xiii</sup> Ministry of Defense of Japan | [https://www.mod.go.jp/en/d\\_act/exc/india\\_pacific/india\\_pacific-en.html](https://www.mod.go.jp/en/d_act/exc/india_pacific/india_pacific-en.html) | Achieving the "Free and Open Indo-Pacific (FOIP)" Vision | Japan Ministry of Defense's Approach | Undated | Japan Defense Ministry website describing its role in implementing the country's FOIP Vision

<sup>xiv</sup> Prime Minister's Office of Japan | <https://japan.kantei.go.jp/105/statement/202602/20shiseihoshin.html> | Policy Speech by Prime Minister TAKAICHI Sanae to the 221st Session of the Diet | 20 February 2026 | Official transcript of a speech by Prime Minister Takaichi to the National Diet

<sup>xv</sup> Ryo Kiyomiya | <https://www.asahi.com/ajw/articles/16374774> | Japan seeks stronger defense ties with Pacific island nations | 24 February 2026; Ryu Jung | <https://www.chosun.com/english/world-en/2026/02/25/XKL5SVLVD5E3ZDBE6ETB3MG2ZE/> | Japan Bolsters Pacific Security Against Chinese Expansion | 25 February 2026

<sup>xvi</sup> Dzirhan Mahadzir | <https://news.usni.org/2026/01/30/japan-and-south-korea-agree-to-resume-joint-drills-halted-nearly-one-decade-ago> | Japan and South Korea Agree to Resume Joint Drills Halted Nearly One Decade Ago | 30 January 2026; FORUM Staff | <https://ipdefenseforum.com/2026/02/japan-rok-advance-defense-collaboration-plan-naval-exercise/> | Japan, ROK advance defense collaboration, plan naval exercise | 22 February 2026

<sup>xvii</sup> Maria T. Reyes | <https://ipdefenseforum.com/2026/03/japan-philippines-advance-strategic-partnership-with-defense-logistics-agreement/> | Japan, Philippines advance strategic partnership with defense logistics accord | 7 March 2026

<sup>xviii</sup> Generated using NotebookLM



## Kurdish Anti-Syrian Transitional Government Insurgency Unlikely in the Next Six Months

Author: Timothy McGill

Editors: Hayley Page, Corey Black, Connor Colford, Vrin Giritharan, Katherine Millet, Julie Ferringer

*We assess with moderate confidence that Kurdish forces will integrate into the Syrian military and cooperate with Damascus on security operations in north and east Syria over the next six months, which will consolidate military power under the Syrian Transitional Government (STG) in north and east Syria.* The 30 January agreement between the Syrian Democratic Forces (SDF) and the STG requires integrating SDF forces into the Syrian Defense and Interior Ministries. This step aims to end hostilities and centralize military authority under the STG to support national unity and stability.<sup>i</sup> The January 2026 agreement is the STG's second attempt to integrate the SDF into the Syrian military, following a failed agreement in March 2025 that prevented major conflict between the SDF and STG for roughly eight months before clashes resumed in Aleppo province in late 2025.<sup>ii</sup> Notably, the SDF and STG have already made more progress on integrating in this second attempt than they did following the March 2025 agreement.<sup>iii</sup>

- In February 2026, a delegation from the STG Internal Security Forces met with Al-Hasakah Governor Nouredine Ahmed and former SDF Commander-in-Chief Mazloum Abdi to facilitate cooperation and integration into the Syrian security apparatus, according to second-hand sources affiliated with the Iraqi Kurdistan Democratic Party (KDP) and the SDF.<sup>iv</sup>
- The STG and SDF have established multiple joint security checkpoints along roads in areas formerly under SDF control, including in Kobani and Jalbiya, Aleppo province, and in Al-Hasakah province, since February 2026, according to an SDF-affiliated source with secondhand access and a reliable record of reporting on the SDF.<sup>v</sup>
- The Syrian Defense Ministry announced the appointment of former People's Defense Forces and SDF leader Sipan Hemo as Deputy Defense Minister for the Eastern Region of Syria. The Eastern Region includes territories formerly under SDF control, such as Deir Al-Zour, Raqqa, and Al-Hasakah, according to multiple sources with secondhand access and reliable track records. These sources include a Syrian state-owned outlet, a pro-SDF outlet, and a KDP-affiliated outlet.<sup>vi</sup>
- On 9 February, 2026, an STG delegation inspected the Al-Rmeilan oil field in Al-Hasakah province, according to a pro-SDF outlet with a reliable track record of reporting on north and east Syria.<sup>vii</sup> On 14 March, the STG took control of Al-Rmeilan base, according to a Syrian state-owned outlet with a reliable track record.<sup>viii</sup>

*We assess with moderate confidence that SDF and Iraqi Kurdish authorities will remove non-Syrian Kurdish militants from Syria over the next six months, which will reduce their participation in any anti-STG insurgency and reduce the likelihood of instability.* In the weeks preceding the January integration agreement, the SDF and STG military forces fought across three Kurdish-majority neighborhoods in Aleppo city, with the STG ultimately deploying into SDF-held areas in Aleppo, Raqqa, Al-Hasakah, and Deir Al-Zour provinces.<sup>ix</sup> Kurdish fighters, including alleged Kurdistan Workers Party (PKK) members, crossed from the Kurdistan Region of Iraq and Turkey into Syria in support of the SDF.<sup>x</sup> However, since January 2026, Kurdish leaders across Syria and Iraq have worked with the STG to relocate non-Syrian PKK fighters out of Syria.

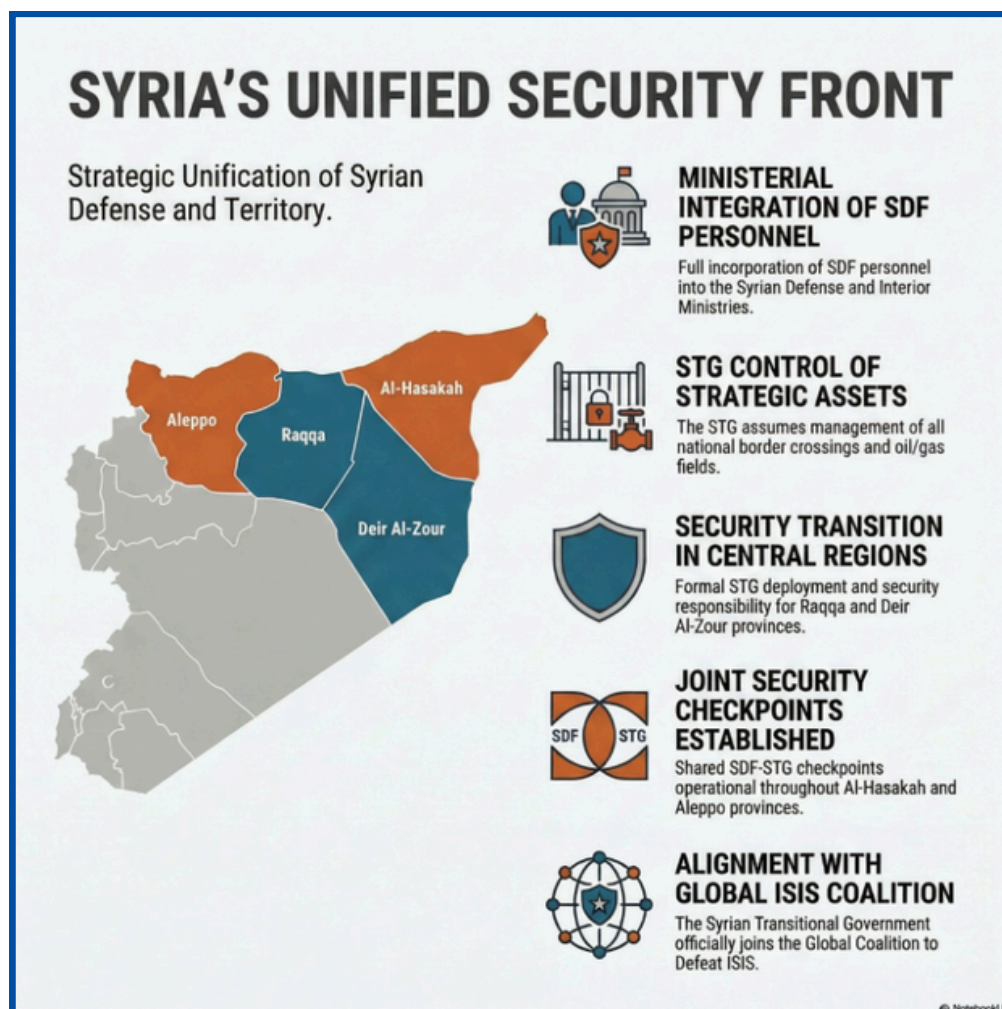
- Within the January integration agreement, the SDF committed to removing all “non-Syrian” PKK members from Syria to “ensure sovereignty and regional stability,” according to a Syrian state-owned outlet with a reliable track record reporting on the STG.<sup>xi</sup>
- The Kurdistan Regional Government in Iraq transferred 100 non-Syrian PKK fighters from Syria to the Qandil Mountains in Iraq, according to a pro-Kurdish source with secondhand access and a reliable track record.<sup>xii</sup>
- Approximately 1,000 total PKK fighters will move from Syria to the Kurdistan Region of Iraq under the 30 January agreement, according to a Saudi state-supported second-hand source with a reliable track record.<sup>xiii</sup>



## Rising Practitioners

*We assess with high confidence that Turkey will continue to support the integration of the SDF into a STG military structure over the next six months to eliminate PKK military activity and dismantle the SDF's autonomous structure.* Turkey is the STG's main supporter, having backed Hay'at Tahrir Al-Sham (HTS) during the Syrian civil war and funded HTS and STG-aligned militias, such as the Syrian National Army, during the transitional period. Turkey also has a history of anti-PKK military operations within its own borders and in Syria and Iraq, and claims the PKK is an existential threat to Turkish sovereignty. Turkey was one of the first countries to express support for the January integration agreement, announcing that it would support "counter terrorism efforts," referring to Kurdish terrorism.<sup>xiv</sup>

- On 10 February, 2026, Turkish Foreign Minister Hakan Fidan reinforced the Turkish government's longstanding position that "the PKK is an organization established against Turkey," and declared Turkey's commitment to eliminating the PKK from Syria, then Iraq, according to a Turkish state-owned source.<sup>xv</sup>
- The Turkish Defense Ministry claimed Turkey would not accept any alternatives to the SDF integrating into the Syrian military and that Turkey was "closely monitoring" developments in the integration, according to a pro-Kurdish source with secondhand access.<sup>xvi</sup>
- Turkish Defense Minister Yaşar Güler claimed Turkey would not withdraw its military from Syria as a precaution to prevent a Kurdish insurgency in Syria, according to a pro-Erdoğan source with secondhand access and a reliable record of reporting on Turkish government statements.<sup>xvii</sup>



*Graphic on Syria's Unified Security Front.<sup>xviii</sup>*



## Source Summary Statement

We make these assessments with moderate confidence, based on a body of reporting we deem to be credible and reliable. Most of the reporting is secondhand access, though some reports, especially government-owned sources, provide firsthand access. Most reports come from sources with relevant biases, including pro-Kurdish, pro-STG, or pro-Turkish sentiments, which reduces confidence in the credibility of some sources. When possible, the reporting overcomes biases by triangulating information from diverse sources. The most significant intelligence gap is the lack of information about possible splintering within the SDF ranks and the actions and intentions of the PKK or PKK-aligned fighters. Though there is no reporting that suggests splintering within the SDF, we cannot assess whether or not there is full cohesion amongst Kurdish actors. Likewise, we cannot assess with high confidence whether the PKK is still active within Syria and whether it intends to stage an insurgency against the STG. Overall, the biases of some sources and gaps in the intelligence produce a moderate confidence level in the sourcing.

## Notes

<sup>i</sup> Maya Gebeily and Jana Choukeir | <https://www.reuters.com/world/middle-east/syrian-kurdish-led-sdf-agree-ceasefire-phased-integration-deal-with-government-2026-01-30/> | Syrian government, Kurds agree integration deal, US hails 'historic milestone' | 30 January 2026 | Credible reporting of STG-SDF integration agreement and Arab-Kurdish relations in Syria.

<sup>ii</sup> The New Arab | <https://www.newarab.com/news/syria-government-sdf-clash-1st-anniversary-rebel-offensive> | Syria government-SDF clash on first anniversary of rebel offensive that toppled Assad | 27 November 2025 | Independent second-hand source reporting on SDF-STG clashes in Aleppo province.

<sup>iii</sup> Al-Jazeera | <https://www.aljazeera.com/features/2025/12/23/clashes-in-aleppo-as-deadline-for-sdfs-integration-into-army-approaches> | Aleppo clashes expose hurdles in SDF's integration into Syrian army | 23 December 2025 | Qatar state-owned outlet reports SDF and STG on clashes in Aleppo and integration progress.

<sup>iv</sup> Rudaw News Agency | <https://www.rudawarabia.net/arabic/middleeast/syria/02032026> | A Syrian government delegation in Al-Hasakah governorate discusses mechanisms to enable the integration process | 3 February 2026 | KDP-affiliated outlet reporting meeting in Al-Hasakah. ; Hawar News Agency | <https://hawarnews.com/en/commander-of-internal-security-forces-visits-hasakah-governor> | Commander of Internal Security Forces visits Hasakah Governor | 7 February 2026 | SDF-affiliated second-hand source reporting on meeting in Al-Hasakah.

<sup>v</sup> Hawar News Agency | <https://hawarnews.com/en/kobani-administration-inspects-joint-internal-security-checkpoints-in-sheikhler> | Kobani Administration inspects joint Internal Security checkpoints in Sheikhlêr | 1 March 2026 | SDF-affiliated outlet reports on STG-SDF joint checkpoint in Kobani. ; Hawar News Agency | <https://t.me/HawarNews/59985> | Installation of joint checkpoints #for\_internal\_security\_forces in the city of #Jalbiya | 27 February 2026 | SDF-affiliated outlet, via Telegram, reports about joint STG-SDF checkpoint in Jalbiya. ; Hawar News Agency | <https://hawarnews.com/en/joint-security-checkpoints-deployed-at-hasakah-entrances> | Joint security checkpoints deployed at Hasakah entrances | 4 March 2026 | SDF-affiliated outlet reports on joint STG-SDF checkpoint in Al-Hasakah province.

<sup>vi</sup> Syrian Arab News Agency | <https://t.me/SANANewsEnglish/69925> | Appointment of Sipan Hemo as Deputy Minister of Defense | 10 March 2026 | Syrian government, via Telegram, announces Deputy Defense Minister appointment. ; North Press Agency | [https://t.me/npa\\_syria/77707](https://t.me/npa_syria/77707) | Appointment of Sipan Hemo as Deputy Minister of Defense | 10 March 2026 | Pro-SDF outlet, via Telegram, shares appointment of former SDF officer to Syrian Defense Ministry. ; Rudaw News Agency | <https://www.rudaw.net/english/middleeast/syria/10032026> | Prominent SDF commander appointed deputy Syrian defense minister | 10 March 2026 | KDP-affiliated source announces appointment of former SDF officer to Syrian Defense Ministry.



## Notes

<sup>vii</sup> North Press Agency | <https://www.facebook.com/share/p/1aXteZkH81/> | STG delegation inspects Rmeilan | 9 February 2026 | Pro-SDF outlet reports STG delegation inspects Rmeilan oil fields following integration agreement.  
<sup>viii</sup> Syrian Arab News Agency | <https://t.me/SANANewsEnglish/70153> | Syrian army takes control of Al-Rmeilan base after coalition withdrawal | 14 March 2026 | Syrian government, via Telegram, announces STG assumes control of Al-Rmeilan base in Al-Hasakah province.

<sup>x</sup> The New Arab | <https://www.newarab.com/news/hundreds-armed-iraqi-kurds-cross-northeast-syria> | Hundreds of armed Iraqi Kurds cross into Syria's Hassakeh province | 29 January 2026 | Independent second-hand source reporting on Iraqi Kurds joining SDF-STG clashes. ; Syrian Arab News Agency | <https://t.me/SANANewsEnglish/67457> | SDF Activity During January Clashes | 24 January 2026 | Syrian government, via Telegram, claims SDF recruits PKK terrorists and violates human rights. ; The Arab Weekly | <https://theArabweekly.com/syria-offensive-leaves-turkeys-kurds-edge-peace-process-risk> | Syria offensive leaves Turkey's Kurds on edge, peace process at risk | 21 January 2026 | Independent second-hand source reporting on Turkish Kurds crossing into Syria to support SDF.

<sup>xi</sup> Syrian Arab News Agency | <https://sana.sy/en/syria/2291194/> | Terms of the Ceasefire and Integration Agreement between Syria and SDF | 18 January 2026 | Syrian government releases text of the STG-SDF integration agreement.

<sup>xii</sup> North Press Agency | <https://npasyria.com/en/135507/> | Non-Syrian PKK militants relocated from Syria to Iraq's Qandil | 11 February 2026 | Pro-Kurdish outlet claims PKK fighters move to Iraq.

<sup>xiii</sup> Ibrahim Hamidi | <https://en.majalla.com/node/329626/politics/back-qandil-pkk-fighters-finally-leaving-syria> | Back to Qandil: PKK fighters finally leaving Syria | 12 February 2026 | Experienced Syria reporter with unclear access.

<sup>xiv</sup> Republic of Turkey Ministry of Foreign Affairs | [https://www.mfa.gov.tr/no\\_9\\_suriye-de-aciklanan-ateskes-ve-tam-entegrasyon-anlasmasi-hk.en.mfa](https://www.mfa.gov.tr/no_9_suriye-de-aciklanan-ateskes-ve-tam-entegrasyon-anlasmasi-hk.en.mfa) | No: 9, 18 January 2026, Regarding the Ceasefire and Full Integration Agreement Announced in Syria | 18 January 2026 | Turkish government statement on STG-SDF integration agreement.

<sup>xv</sup> Can Efesoy | <https://www.aa.com.tr/en/americas/turkish-foreign-minister-warns-against-pkk-terror-groups-presence-in-iraq/3825338#> | Turkish foreign minister warns against PKK terror group's presence in Iraq | 10 February 2026 | Turkish state-owned outlet shares statement from Foreign Minister renouncing PKK in Syria and Iraq.

<sup>xvi</sup> North Press Agency | <https://npasyria.com/232723/> | Turkish Defense: We Expect the Integration Process Between the Syrian Government and the SDF to be Completed Quickly | 19 February 2026 | Pro-Kurdish outlet shares a Turkish government statement supporting SDF integration in the STG.

<sup>xvii</sup> Fatih Çekirge | <https://www.hurriyet.com.tr/yazarlar/fatih-cekirge/bakan-guler-suriyeden-simdi-cikmayiz-43103611> | Minister Güler: 'We will not leave Syria now' | 9 February 2026 | Pro-Erdogan interviews Turkish Defense Minister on Turkish military in Syria.

<sup>xviii</sup> Syrian Arab News Agency | <https://sana.sy/en/syria/2291194/> | Terms of the Ceasefire and Integration Agreement between Syria and SDF | 18 January 2026 | Syrian government releases text of the STG-SDF integration agreement. ; Rudaw News Agency | <https://www.rudawarabia.net/arabic/middleeast/syria/02032026> | A Syrian government delegation in Al-Hasakah governorate discusses mechanisms to enable the integration process | 3 February 2026 | KDP-affiliated outlet reporting meeting in Al-Hasakah. ; Hawar News Agency | <https://hawarnews.com/en/commander-of-internal-security-forces-visits-hasakah-governor> | Commander of Internal Security Forces visits Hasakah Governor | 7 February 2026 | SDF-affiliated second-hand source reporting on meeting in Al-Hasakah. ; Hawar News Agency | <https://hawarnews.com/en/kobani-administration-inspects-joint-internal-security-checkpoints-in-sheikhler> | Kobani Administration inspects joint Internal Security checkpoints in Sheikhler | 1 March 2026 | SDF-affiliated outlet reports on STG-SDF joint checkpoint in Kobani.



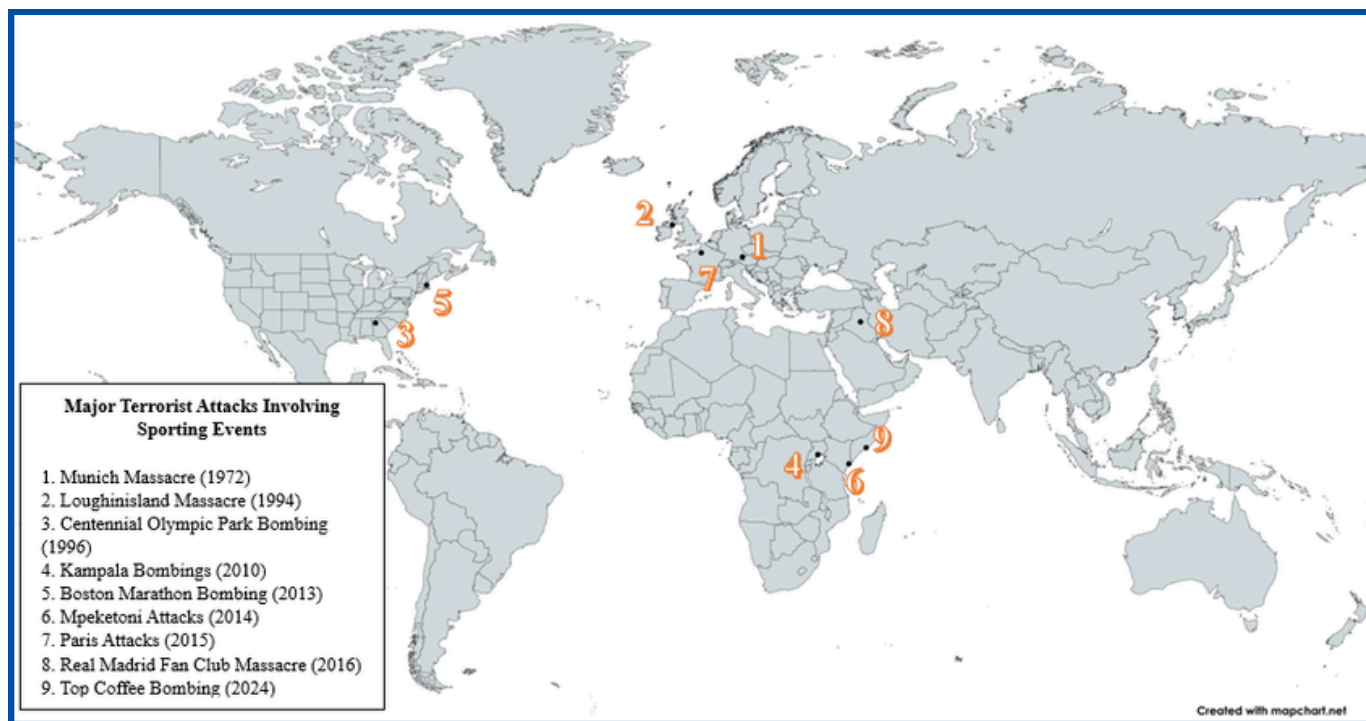
## Jihadist Organizations & Supporters Likely to Target 2026 World Cup-Affiliated Events

Author: David Reas

Editors: Hayley Page, Corey Black, Connor Colford, Vrin Giritharan, Katherine Millet, Julie Ferringer

*We assess with moderate confidence that unaffiliated jihadist sympathizers pose the greatest threat to 2026 World Cup public gatherings because their decentralized nature and lack of coordination make them disproportionately difficult to detect and disrupt.* In the lead-up to and during the World Cup, fans will be holding celebrations, which provide targets for would-be attackers that would almost certainly capture a global audience. Jihadists previously targeted World Cup-associated events; two al-Shabaab attacks on World Cup watch parties in Kampala, Uganda (2010)<sup>i</sup> and Mpeketoni, Kenya (2014)<sup>ii</sup> show how vulnerable unguarded public gatherings can be compared to large-scale, protected events, like the like the Olympics. Independent sympathizers often act without coordinating with others. In addition, their relative lack of sophistication offers fewer opportunities for detection.<sup>iii</sup>

- Though stadiums for the World Cup likely will be well guarded, other locations fans visit will remain vulnerable. Hotels, public transportation, and restaurants will have uneven protection, making these locations more exposed, according to credible experts on violent extremism with second-hand access to the information.<sup>iv</sup>
- Jihadist attacks targeting gatherings outside sporting events have uneven success rates, e.g., an unsuccessful attempt to storm a hotel during the 1998 World Cup, suicide bombings directed at public transportation prior to the 2014 Sochi Olympics, and a 2016 shooting of soccer fans in Balad, Iraq, according to a reliable terrorism expert with second-hand access to the information.<sup>v</sup>
- Independent small-scale attacks generally result in less destruction and lack strategic value, but jihadist sympathizers continue to carry them out because the attacks still contribute to the jihadist cause, according to a reliable expert on terrorism and counterterrorism with second-hand access to information.<sup>vi</sup>





# Rising Practitioners

***We assess with moderate confidence that the Islamic State (IS) will use its affiliates to attempt attacks targeting 2026 World Cup-related events worldwide to maintain its status as the dominant, transnational jihadist organization.*** Due to leadership and territorial losses in recent years, IS has had to decentralize operational decision making. To compensate, it created the General Directorate of Provinces (GDP), giving its affiliates a greater role in cooperating to plan and carry out terrorist attacks.<sup>vii</sup> Affiliates in Pakistan and Somalia attempted to carry out attacks in Sweden (March 2024) and India (May 2024), respectively, and the Yemeni affiliate likely played a role in the 2024 shooting near a Shia mosque in Muscat that killed six people and injured 28 others.<sup>viii</sup>

- IS and its supporters have previously attempted to attack prominent sporting events, including the 2018 World Cup in Russia, the 2022 World Cup in Qatar, and the 2024 Olympics in Paris, according to analysis from a reliable organization and experts on conflict and terrorism with second-hand access to the information.<sup>ix</sup>
- IS affiliates have worked together to share funds and manpower for operations, according to a reliable think tank specializing in conflicts with second-hand access to the information.<sup>x</sup> For example, IS's Somalia affiliate serves as a financial and operational support hub for other affiliates by financing attacks in Afghanistan and sending trainers to Central Africa, according to a credible organization specializing in security challenges with second-hand access to the information.<sup>xi</sup>
- Following the loss of territory in Iraq and Syria and dissolution of its external security unit, IS now relies on the GDP to oversee the planning and execution of attacks through its various affiliates, according to interviews with intelligence officials by a credible expert on jihadist organizations with second-hand access to the information.<sup>xii</sup>

***We assess with high confidence that al-Qaida (AQ) will not attempt to attack any 2026 World Cup events because of restraints imposed by the Taliban, its prioritization of long-term rebuilding, and its affiliates' disinterest.*** Since returning to power, the Taliban has prevented AQ and most terrorist organizations based in Afghanistan from launching external attacks.<sup>xiii</sup> While the Taliban's restrictions have contributed to a pause in AQ attacks, the group is also likely to prioritize rebuilding itself over terrorist attacks for the near term.<sup>xiv</sup> While the AQ franchise remains intact, the parent's transnational focus has not been retained by its affiliates, who focus on revolutionary jihads that prioritize overthrowing local governments.<sup>xv</sup>

- AQ may be temporarily restraining itself from conducting attacks to avoid attention, according to a reliable expert on South Asia with second-hand access to information.<sup>xvi</sup>
- AQ's leadership is using its reclaimed haven to rebuild its infrastructure for future attacks, according to a credible expert on extremist violence with second-hand access to the information.<sup>xvii</sup>
- AQ's global affiliates prioritize local and regional interests, primarily fighting rivals, according to a reliable Middle East and terrorism expert with second-hand access to information.<sup>xviii</sup>

## Source Summary Statement

We assess with moderate confidence that these sources are credible and reliable though they largely have second-hand access to the information. Our confidence would be higher with access to firsthand information from sources such as jihadist message boards that reveal both an intent to attack and likely targets. The sources used for this assessment came from credible and established organizations and were written by security experts specializing in terrorism and jihadists studies. Each expert brings several years of experience to their area of expertise, most with PhDs.

## Notes

<sup>i</sup> Federal Bureau of Investigation New York Office | <https://archives.fbi.gov/archives/newyork/press-releases/2010/nyfo071910-1.htm> | "FBI and Uganda Police Seek Assistance Identifying 7/11 Bombers" | 19 July 2010.

<sup>ii</sup> Drazen Jorgic | <https://www.reuters.com/article/uk-kenya-attacks/islamists-kill-50-in-kenya-some-during-world-cup-screening-idUKKBN0ER1GQ20140616/> | "Islamists kill 50 in Kenya, some during World Cup screening" | 16 June 2014.

<sup>iii</sup> The Soufan Center | <https://thesoufancenter.org/intelbrief-2024-april-26/> | "IntelBrief: Islamic State Threat to the West and New Campaign Targeting Sporting Events" | 26 April 2024.



## Notes

- <sup>iv</sup> Alexandre Rodde, David McIlhatton, John Cuddihy, & Rachel Monaghan | <https://ctc.westpoint.edu/protecting-major-sporting-events-from-terrorism-considerations-for-the-paris-olympics-and-beyond/> | “Protecting Major Sporting Events from Terrorism: Considerations for the Paris Olympics and Beyond” | June 2024.
- <sup>vi</sup> Barak Mendelsohn | <https://ctc.westpoint.edu/on-the-horizon-the-future-of-the-jihadi-movement/> | “On the Horizon: The Future of the Jihadi Movement” | March 2024.
- <sup>vii</sup> Aaron Zelin | <https://warontherocks.com/2024/07/a-globally-integrated-islamic-state/> | “A Globally Integrated Islamic State” | 15 July 2024.
- <sup>viii</sup> Aaron Zelin | <https://www.washingtoninstitute.org/policy-analysis/islamic-states-external-operations-are-more-just-iskp> | “The Islamic State’s External Operations Are More Than Just ISKP” | 26 July 2024.
- <sup>ix</sup> Counter Extremism Project | <https://www.counterextremism.com/press/world-cup-continues-isis-threats-loom> | “Terrorists Take To Social Media To Urge Violence At The Tournament” | 18 June 2018. Caleb Weiss & Joe Truzman | <https://www.longwarjournal.org/archives/2022/11/jihadis-issue-vague-threats-against-world-cup.php> | “Jihadis issue vague threats against World Cup” | 22 November 2022. Ramón Spaaij & Andrew Zammit | <https://icct.nl/publication/terrorism-threat-2024-paris-olympics-learning-past-understand-present> | “The Terrorism Threat to the 2024 Paris Olympics: Learning from the Past to Understand the Present” | 27 June 2024.
- <sup>x</sup> International Crisis Group | <https://www.crisisgroup.org/brf/asia/south-asia/afghanistan/b183-islamic-state-afghanistan-jihadist-threat-retreat> | “The Islamic State in Afghanistan: A Jihadist Threat in Retreat?” | 16 July 2025.
- <sup>xi</sup> The Soufan Center | <https://thesoufancenter.org/intelbrief-2024-july-31/> | “IntelBrief: Growing Islamic State-Somalia Transnational Threat” | 31 July 2024.
- <sup>xii</sup> Tore Hamming | <https://ctc.westpoint.edu/the-general-directorate-of-provinces-managing-the-islamic-states-global-network/> | “The General Directorate of Provinces: Managing the Islamic State’s Global Network” | July 2023.
- <sup>xiii</sup> Analytical Support and Sanctions Monitoring Team | <https://docs.un.org/en/S/2026/44> | “Thirty-seventh report of the Analytical Support and Sanctions Monitoring Team submitted pursuant to resolution 2734 (2024) concerning ISIL (Da’esh), Al-Qaida and associated individuals and entities” | p. 17 | 4 February 2026.
- <sup>xiv</sup> Colin Clarke & Clara Broekaert | <https://ctc.westpoint.edu/the-global-state-of-al-qaida-24-years-after-9-11/> | “The Global State of al-Qa’ida 24 Years After 9/11” | September 2025.
- <sup>xv</sup> Tricia Bacon | <https://icct.nl/publication/jihadist-landscape-amidst-israel-hamas-war-five-critical-factors> | “The Jihadist Landscape Amidst Israel-Hamas War: Five Critical Factors” | 7 December 2023.
- <sup>xvi</sup> Asfandiyar Mir | <https://extremism.gwu.edu/al-qaeda-the-taliban-and-future-of-us-counterterrorism> | “Al-Qaeda, the Taliban, and the Future of U.S. Counterterrorism in Afghanistan” | 8 September 2022.
- <sup>xvii</sup> Sara Harmouch | <https://mwi.westpoint.edu/al-qaedas-third-phase/> | “Al-Qaeda’s Third Phase” | 3 March 2026.
- <sup>xviii</sup> Daniel Byman & Asfandiyar Mir | <https://warontherocks.com/2022/05/how-strong-is-al-qaeda-a-debate/> | “How Strong is al-Qaida? A Debate” | 20 May 2022.



# Islamic State Khorasan Likely to Sustain Tajik and Uzbek Recruitment Through Decentralized Propaganda After Leadership Losses

Authors: Hayley Page and Emily Stingle

Editors: Corey Black, Connor Colford, Vrin Girithiran, Julie Ferringier

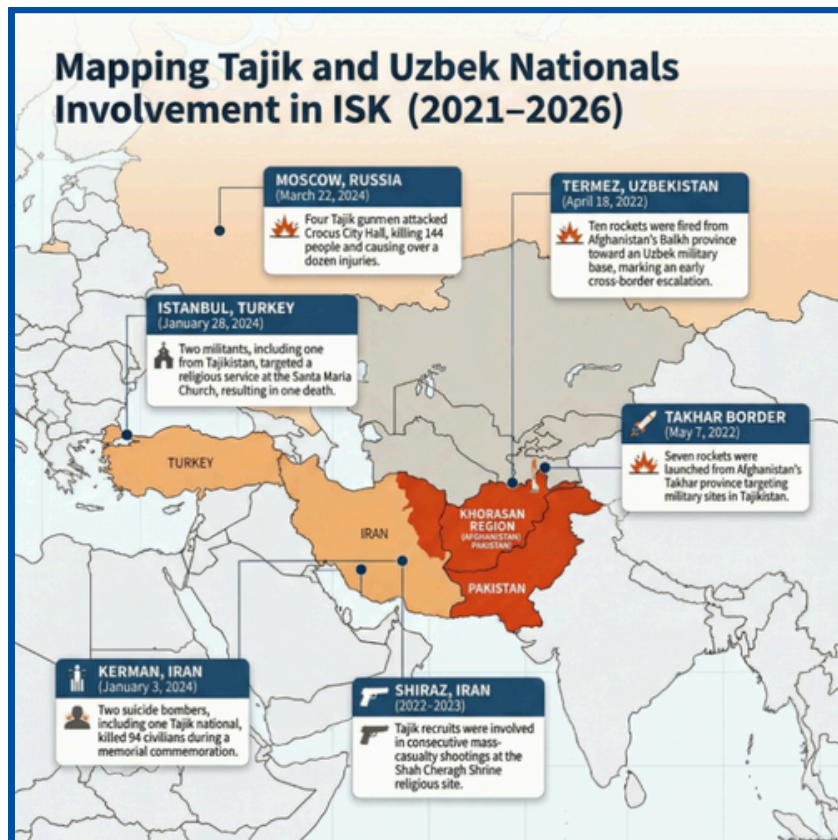
---

*We assess with moderate confidence that over the next 3-6 months, Islamic State Khorasan (ISK) will sustain recruitment of Central Asian nationals, including Tajiks and Uzbeks, following leadership losses, by relying on decentralized dissemination through local recruiters and resilient propaganda networks.* In May 2025, Pakistani intelligence authorities arrested ISK spokesperson Sultan Aziz Azzam, who served as the founder and head of the group's Al-Azaim Foundation - its primary propaganda arm responsible for producing and disseminating official media, including the English-language magazine, *Voice of Khurasan* (VOK).<sup>i</sup> In a separate June 2025 operation, Pakistani and Turkish intelligence authorities arrested Ozgur Altun, also known as Abu Yasir al-Turki, a senior figure in the Islamic State's (IS) media and logistics network, near the Afghan border. Following these arrests, ISK's official media activities, including the VOK, were disrupted or temporarily suspended, indicating a significant degradation of the group's centralized propaganda infrastructure.<sup>ii</sup> Despite these leadership losses, ISK is likely adapt by shifting to more discreet, localized communication methods, and trusted religious networks to sustain its recruitment and operational capacity.<sup>iii</sup>

- In July 2025, Uzbekistan's State Security Service dismantled an ISK-linked cell in Namangan led by a 19-year-old woman who operated multiple virtual channels and groups in Telegram messenger, with more than 120 participants. The group distributed IS paraphernalia, audio and video files of jihadist content, and religious literature. The underground group held in-person meetings calling for "jihad" and for participants to become a "shahid," according to a local Uzbekistan news outlet that provides reliable reporting on domestic security issues, drawing from official law enforcement statements.<sup>iv</sup>
- In late 2025, two attacks targeted Chinese companies and nationals in Tajikistan, killing multiple workers, likely linked to ISK networks, according to a reliable international news organization drawing on official statements and expert analysis.<sup>v</sup> These cross-border attacks highlight the group's continued ability to mobilize recruits for external operations despite leadership disruptions, according to a credible international news organization, although attribution was not officially identified.<sup>vi</sup>
- As reported in March 2025, an ISK Persian podcast featured a Tajik national who described how IS recruiters provided him with financial support, protection, and guidance, and how he subsequently helped recruit other Tajiks to the group. By amplifying peer testimony and shared identity, ISK demonstrated its efforts to focus on recruitment from trusted local networks, according to analysis by a reliable independent research organization that monitors online information platforms.<sup>vii</sup>



## Rising Practitioners



Map plotting ISK attacks committed by Uzbek and Tajik nationals between 2021-2026.<sup>viii</sup>

*We assess with moderate confidence that in the next 3-6 months, ISK will maintain the effectiveness of its messaging and recruitment campaigns targeting Tajik and Uzbek nationals by increasing the use of Artificial Intelligence (AI) in propaganda and encrypted platforms, enabling decentralized dissemination and reducing detectability.*

Under Azzam's leadership, the Al-Azaim Media Foundation began incorporating AI into propaganda training as early as 2023, when the IS published a guide on how to securely use it.<sup>ix</sup> Notably, in February 2026, ISK published Issue 47 of the VOK after several months of dormancy, despite the announcement of new media leadership, likely indicating that the centralized role is not as critical as it once was. Issue 47 of the VOK provided details on how its members can use AI chatbots responsibly, with a comparison table on acceptable versus unacceptable uses, highlighting AI as a strategic tool to aid in propaganda, while also comparing platforms operational security measures.<sup>x</sup> AI enables ISK to produce tailored propaganda across multiple languages, including Tajik and Uzbek, likely accelerating radicalization by analyzing user behavior, targeting vulnerable individuals, and facilitating early-stage engagement and screening prior to direct interaction with a recruiter.<sup>xi</sup>

- Following the March 2024 Crocus City Hall attack in Moscow committed by four Tajik nationals and 11 accomplices, AI-generated propaganda videos publicly claimed by ISK circulated widely across social media and online forums, according to a reliable incident tracking database that documents real-world uses of AI in disinformation and security contexts.<sup>xii</sup> This content amplified narratives and attracted recruits, according to a globally recognized news organization providing reliable coverage on international security and political developments.<sup>xiii</sup>
- IS generated deepfake audio recordings of its own leaders reciting scripture, using AI to translate the message into multiple languages, including local Tajik and Uzbek languages, according to a credible international business and technology-focused news outlet citing expert analysis from researchers that study extremism and AI.<sup>xiv</sup>
- Indian officials recently warned of growing independent, encrypted channels amplifying official ISK propaganda. These small, virtual groups can evade detection or rebrand and reemerge quickly after detection, complicating counterterrorism efforts, according to reliable reporting from a regional outlet citing Indian intelligence officials' public statements.<sup>xv</sup>



## Source Summary Statement

We make these assessments with moderate confidence based on reporting from diverse sources, most of which are credible and are corroborated by other sources. The sources include a combination of well-established think tanks and research institutions providing expert analysis on ISK propaganda, recruitment, and organizational dynamics, alongside international news organizations offering reporting on leadership disruptions, arrests, and emerging technology trends. These sources are supported by regional reporting that provide insight into ISK activity in South and Central Asia, though many rely on limited or unnamed officials, requiring corroboration. The inclusion of primary material, such as analysis of ISK propaganda material, and government reporting, strengthens the evidence. However, key intelligence gaps remain, including limited visibility into ISK's decision making, leadership dynamics, and encrypted networks, in addition to second-hand reporting. Overall, the consistency of findings across independent sources supports assessments.

## Notes

<sup>i</sup> Khalid Mehmood | <https://tribune.com.pk/story/2582870/pakistan-arrests-isis-k-media-chief-as-un-hails-major-blow-to-group> | Pakistan arrests IS-K spokesperson, UN hails move as major setback to group | 18 December 2025 | International news reporting citing a United Nations Security Council report on ISK leadership arrest and its impact on propaganda operations.

<sup>ii</sup> Jamestown Foundation | <https://jamestown.org/sultan-aziz-azam-iskps-spokesperson-arrested-in-pakistan/> | Sultan Aziz Azzam: ISKP's Spokesperson Arrested in Pakistan | 25 March 2025 | Think tank analysis of ISKP leadership disruption and media operations.

<sup>iii</sup> Homeland Security Today | <https://www.hstoday.us/featured/how-islamic-state-khorasan-province-is-adapting-under-counterterrorism-pressure> | How Islamic State Khorasan Province Is Adapting Under Counterterrorism Pressure | 12 August 2025 | Security analysis article examining ISKP adaptation strategies under sustained counterterrorism pressure.

<sup>iv</sup> Tashkent Times | <https://tashkenttimes.uz/national/15656-state-security-service-uncovers-teen-led-isis-khorasan-cell-in-namangan> | State Security Service uncovers teen-led ISIS-Khorasan cell in Namangan | 21 July 2025 | Regional news reporting citing Uzbekistan's State Security Service on the disruption of an ISK-linked cell using Telegram channels to disseminate propaganda and recruit members.

<sup>v</sup> Al Jazeera | <https://www.aljazeera.com/news/2025/12/26/tajikistan-taliban-border-clashes-whats-behind-them-why-it-affects-china> | Tajikistan-Taliban border clashes: What's behind them and why it affects China | 26 December 2025 | International media reporting on regional security dynamics and cross-border militant activity.

<sup>vi</sup> The Diplomat | <https://thediplomat.com/2025/12/5-chinese-workers-killed-in-2-attacks-in-tajikistan-along-afghan-border> | 5 Chinese Workers Killed in 2 Attacks in Tajikistan Along Afghan Border | 05 December 2025 | International reporting on Central Asian security developments citing official statements and regional sources.

<sup>vii</sup> Information Resilience & Afghan Witness | [https://www.info-res.org/app/uploads/2025/07/Final\\_The-use-of-audio-in-ISKP-propaganda-1.pdf](https://www.info-res.org/app/uploads/2025/07/Final_The-use-of-audio-in-ISKP-propaganda-1.pdf) | The Use of Audio in ISKP Propaganda | March 2025 | OSINT-based analytical report examining ISKP audio propaganda across encrypted platforms.

<sup>viii</sup> Aaron Zelin | <https://www.washingtoninstitute.org/islamicstateinteractivemap/#country/243> | 05 April 2026 | Data pulled from The Islamic State Select Worldwide Activity Interactive Map

<sup>ix</sup> Fabrizio Minniti | <https://gnet-research.org/2025/04/11/automated-recruitment-artificial-intelligence-iskp-and-extremist-radicalisation/> | Automated Recruitment: Artificial Intelligence, ISKP, and Extremist Radicalisation | 11 April 2025 | OSINT-based analysis examining ISKP's use of AI to automate recruitment, tailor propaganda, and enhance radicalization pathways.



## Rising Practitioners

---

<sup>x</sup> The Khorasan Diary | <https://thekhorasandiary.com/index.php/en/2026/02/23/tkd-monitoring-iskp-released-voice-of-khorasan-issue-47> | TKD Monitoring: ISKP Released Voice of Khorasan Issue 47 | 23 February 2026 | Regional security monitoring outlet reporting on ISKP propaganda releases and media activity.

<sup>xi</sup> Fabrizio Minniti | <https://gnet-research.org/2025/04/11/automated-recruitment-artificial-intelligence-iskp-and-extremist-radicalisation/> | Automated Recruitment: Artificial Intelligence, ISKP, and Extremist Radicalisation | 11 April 2025 | OSINT-based analysis examining ISKP's use of AI to automate recruitment, tailor propaganda, and enhance radicalization pathways.

<sup>xii</sup> Incident Database | <https://incidentdatabase.ai/cite/656/> | Islamic State and Artificial Intelligence Use Case | 23 March 2024 | Analytical database entry examining extremist use of artificial intelligence in propaganda and operations.

<sup>xiii</sup> Associated Press | <https://apnews.com/article/islamic-state-group-artificial-intelligence-deepfakes-ba201d23b91dbab95f6a8e7ad8b778d5> | Islamic State Group Increasingly Using AI and Deepfakes in Propaganda | 15 December 2025 | International news reporting on extremist adoption of AI tools, including deepfakes and synthetic media.

<sup>xiv</sup> Associated Press | <https://apnews.com/article/islamic-state-group-artificial-intelligence-deepfakes-ba201d23b91dbab95f6a8e7ad8b778d5> | Islamic State Group Increasingly Using AI and Deepfakes in Propaganda | 15 December 2025 | International news reporting on extremist adoption of AI tools, including deepfakes and synthetic media.

<sup>xv</sup> Sayan Ghosh | <https://english.mathrubhumi.com/amp/news/world/iskp-expands-propaganda-network-indian-agencies-volunteer-channels-waqoqfrz> | ISKP Expands Propaganda Network; Indian Agencies Flag Surge in Volunteer Channels | 14 March 2026 | Regional news reporting citing Indian intelligence officials on ISKP's expansion of decentralized, volunteer-driven propaganda networks and AI-enabled content dissemination.



### El Mencho's Death Very Likely to Result in **Cártel de Jalisco Nueva Generación Escalating Violence and Extortion**

Author: Josie Bloom

Editors: Hayley Page, Corey Black, Connor Colford, Vrin Giritharan, Katherine Millet, Julie Ferringer

---

*We assess with high confidence that the death of Nemesio “El Mencho” Rubén Oseguera Cervantes will lead to a power struggle within Cártel de Jalisco Nueva Generación (CJNG), resulting in escalated violence toward civilians as factions of the CJNG seek to gain territorial control to improve their position vis-à-vis one another.* Since launching its war on drugs in 2006, the Mexican government has employed the “kingpin strategy” targeting the heads of criminal organizations.<sup>i</sup> This strategy was recently used against El Mencho, who was killed by the Mexican military on 22 February. However, the capture or death of kingpins often leads cartels to split into smaller and often more violent groups, such as the Cartel de Sinaloa’s fragmentation after the extradition of El Chapo.<sup>ii</sup> The sudden leadership vacuum within CJNG’s highly centralized structure probably created a similar unstable environment.

- CJNG has always used violent attacks, kidnappings, and public executions to coerce local populations into compliance, according to a highly credible U.S. government organization with direct access to interagency counterterrorism analysis.<sup>iii</sup> In Jalisco, for example, over 40% of CJNG operations from 2018-2022 involved violence toward civilians, probably suggesting a deliberate strategy to reinforce control in established strongholds and signal dominance into new areas the group, according to analysis from a credible, impartial conflict monitor with thirdhand access based on open-source reporting.<sup>iv</sup>
- The large size and wide reach of CJNG make violent fragmentation probable, particularly because CJNG’s current line of succession is unclear following El Mencho’s son’s incarceration at ADX Florence, according to credible analysis by an impartial investigative journalism agency focused on organized crime with thirdhand access.<sup>v</sup> El Mencho’s stepson and influential local leaders like Doble R and El Jardinero are potential successors, according to research from a credible and reliable security analysis provider with thirdhand access known for their impartial and detail-driven reporting.<sup>vi</sup>
- CJNG’s lack of a clear successor and centralized operation will likely foster internal competition, fragmentation, and violent conflict over key strategic assets, according to credible third-hand research from an impartial think tank focused on terrorism and international security.<sup>vii</sup>

*Concurrent to the internal power struggle, we assess with high confidence that CJNG will intensify extortion campaigns targeting agricultural industries, particularly lime and avocado production in Michoacán, within the next 6 months to maximize territorial control in inter-cartel competition.* Michoacán’s booming agricultural industry and position along key drug trafficking routes make it a vital stronghold for cartels seeking to entrench territorial dominance, which they exploit by levying protection fees on producers and transporters enforced through violence.<sup>viii</sup> The loss of a cartel leader under the kingpin strategy has historically led to heightened extortion within the following six months, therefore leaving CJNG in a weakened position that incentivizes rival offensives and intensifies inter-cartel competition.<sup>ix</sup> Periods of heightened competition historically correspond with surges in extortion activity as groups seek to maximize revenue and reassert territorial control, a pattern likely to persist as CJNG competes with Cárteles Unidos (CU) for dominance over economic hubs in Michoacán.

- CJNG has increased its involvement in extortion schemes to diversify revenue streams and protect assets from law enforcement since at least May 2025, according to a highly credible U.S. law enforcement and intelligence agency with direct access to interagency reporting and investigative data.<sup>x</sup>
- In the Tierra Caliente region of Michoacán, CJNG and CU violently compete over lime and avocado production, with control over these industries providing both economic benefits through extortion and enhanced territorial power, according to assessments from a credible and impartial defense analysis provider with thirdhand access.<sup>xi</sup> Most notably, CJNG massacred and publicly displayed the bodies of 19 CU affiliates in the agricultural hotbed of Uruapan in 2019, according to analysis by a credible consortium of terrorism experts with thirdhand access.<sup>xii</sup>
- Michoacán remains strategically valuable due to its location along key trafficking routes and contested areas such as Tepalcatepec and the Tierra Caliente corridor, therefore CJNG is likely to rely more heavily on agricultural extortion to reinforce dominance amid its weakened position,<sup>xiii</sup> according to credible analysis from a U.S. law enforcement agency and an unbiased geopolitical risk firm.<sup>xiii</sup>



### Source Summary Statement

We make these assessments with high confidence, based on a body of reporting we deem to be credible and reliable. This reporting relies on sources with second or third-hand access, though all sources are still credible. Many sources are third-hand, but come from well-established think tanks with transparent funding from reputable agencies, while others are published as academic research by reliable professors. Additionally, second-hand sources published by U.S. government agencies, namely the Department of the Treasury, Drug Enforcement Administration, and National Counterterrorism Center, drive some of this reporting. Because this analysis relies mostly on second- and third-hand reporting, it leaves important gaps in verifying event accuracy, timing, and scale, while also limiting direct insight into CJNG's internal decision-making and succession dynamics. It also increases the risk that key judgments about intent, fragmentation, and future violence are shaped by earlier sources' assumptions rather than first-hand evidence. To best mitigate these gaps, this assessment uses historical patterns and impartial expert analysis to draw well-informed conclusions.



## Notes

<sup>i</sup> Jane Esberg | <https://mwi.westpoint.edu/why-mexicos-kingpin-strategy-failed-targeting-leaders-led-to-more-criminal-groups-and-more-violence/> | Why Mexico's Kingpin Strategy Failed: Targeting Leaders Led to More Criminal Groups and More Violence | 9 June 2022 | Credible article by respected author published by the United States Military Academy

<sup>ii</sup> Jane Esberg | <https://mwi.westpoint.edu/why-mexicos-kingpin-strategy-failed-targeting-leaders-led-to-more-criminal-groups-and-more-violence/> | Why Mexico's Kingpin Strategy Failed: Targeting Leaders Led to More Criminal Groups and More Violence | 9 June 2022 | Credible article by respected author published by the United States Military Academy

<sup>iii</sup> National Counterterrorism Center | [https://www.dni.gov/nctc/terrorist\\_groups/cjng.html#:~:text=CJNG%20conducts%20public%20executions%20and,judges%2C%20and%20law%20enforcement%20officers](https://www.dni.gov/nctc/terrorist_groups/cjng.html#:~:text=CJNG%20conducts%20public%20executions%20and,judges%2C%20and%20law%20enforcement%20officers) | New Generation Jalisco Cartel (CJNG) | February 2026 | U.S. Government web page providing an overview of CJNG

<sup>iv</sup> Sandra Pellegrini and María Fernanda Arocha | <https://acleddata.com/report/actor-profile-jalisco-new-generation-cartel-cjng> | Actor Profile: The Jalisco New Generation Cartel (CJNG) | 14 April 2023 | Credible report from ACLED, a conflict database funded by the Complex Risk Analytics Fund

<sup>v</sup> Parker Asmann | <https://insightcrime.org/news/whats-next-for-mexicos-cjng-after-the-killing-of-el-mencho/> | What's Next for Mexico's CJNG After the Killing of 'El Mencho'? | 23 February 2026 | Credible report from an American University-sponsored think tank and investigative journalism agency

<sup>vi</sup> Janes | <https://www.janes.com/osint-insights/defence-and-national-security-analysis/death-of-cjng-leader-very-likely-to-exacerbate-violence-in-several-mexican-states-in-the-long-term> | Death of CJNG leader very likely to exacerbate violence in several Mexican states in the long term | 23 February 2026 | Credible report by Janes addressing short, medium, and long term possibilities

<sup>vii</sup> Alex Vedovi | <https://q/www.visionofhumanity.org/el-mencho-is-dead-mexicos-fragile-peace-now-faces-its-biggest-test-in-years/> | 'El Mencho' Is Dead. Mexico's Fragile Peace Now Faces Its Biggest Test in Years | 25 February 2026 | Reliable piece from an analysis organization sponsored by the Institute for Economics & Peace

<sup>viii</sup> Itzel de Haro | <https://www.sciencedirect.com/science/article/pii/S0305750X25000257#fn13> | Avocados: Mexico's green gold, drug cartel violence, and the U.S. opioid crisis | 5 March 2025 | p. 3 | Credible academic report discussing economic importance of agricultural extortion to cartels

<sup>ix</sup> Patricio Estévez-Soto and Reynaldo Lecona Esteban | <https://journals.sagepub.com/doi/10.1177/17488958241276178#:~:text=While%20kidnapping%20is%20not%20as,place%20or%20in%20neighbouring%20municipalities> | The impact of the kingpin strategy on extortion and kidnapping | 20 September 2024 | Scholarly article in a criminology journal addressing correlation between kingpin removal and extortion campaigns ; Janes | <https://www.janes.com/osint-insights/defence-and-national-security-analysis/death-of-cjng-leader-very-likely-to-exacerbate-violence-in-several-mexican-states-in-the-long-term> | Death of CJNG leader very likely to exacerbate violence in several Mexican states in the long term | 23 February 2026 | Credible report by Janes addressing short, medium, and long term possibilities

<sup>x</sup> Drug Enforcement Administration | <https://www.dea.gov/sites/default/files/2025-07/2025NationalDrugThreatAssessment.pdf> | 2025 National Drug Threat Assessment | 13 May 2025 | p. 11 | Official publication released by Drug Enforcement Administration



## Notes

<sup>xi</sup> Janes | <https://www.janes.com/osint-insights/defence-and-national-security-analysis/death-of-cjng-leader-very-likely-to-exacerbate-violence-in-several-mexican-states-in-the-long-term> | Death of CJNG leader very likely to exacerbate violence in several Mexican states in the long term | 23 February 2026 | Credible report by Janes addressing short, medium, and long term possibilities

<sup>xii</sup> Samuel Henkin | <https://www.start.umd.edu/tracking-cartels-infographic-series-pits-violence-michoac-n-over-control-avocado-trade#:~:text=The%20Jalisco%20Nueva%20Generaci%C3%B3n%20Cartel,in%20Michoac%C3%A1n%20is%20largely%20overlooked> | Tracking Cartels Infographic Series: The Pits: Violence in Michoacán Over Control of Avocado Trade | 17 June 2020 | Credible third-hand analysis from reputable consortium on terrorism

<sup>xiii</sup> Drug Enforcement Administration | <https://www.dea.gov/sites/default/files/2025-07/2025NationalDrugThreatAssessment.pdf> | 2025 National Drug Threat Assessment | 13 May 2025 | p. 15 | Official publication released by Drug Enforcement Administration ; Wifredo A. Ferrer, Barbara A. Martinez, Alejandro A. Sánchez Mújica A., Oscar Alejandro Quiroz-Chavez | <https://www.hklaw.com/en/insights/publications/2026/03/recent-us-enforcement-actions-against-mexican-cartels-emerging-risks> | Recent U.S. Enforcement Actions Against Mexican Cartels: Emerging Risks for the Agro-Industry | 26 March 2026 | Geopolitical risk assessment of Mexican agricultural industry relying on English and Spanish-language sources



### **Saudi-UAE Proxy Wars Will Likely Increase Conflict and Destabilization in the Nile Basin in the Next 3-6 Months**

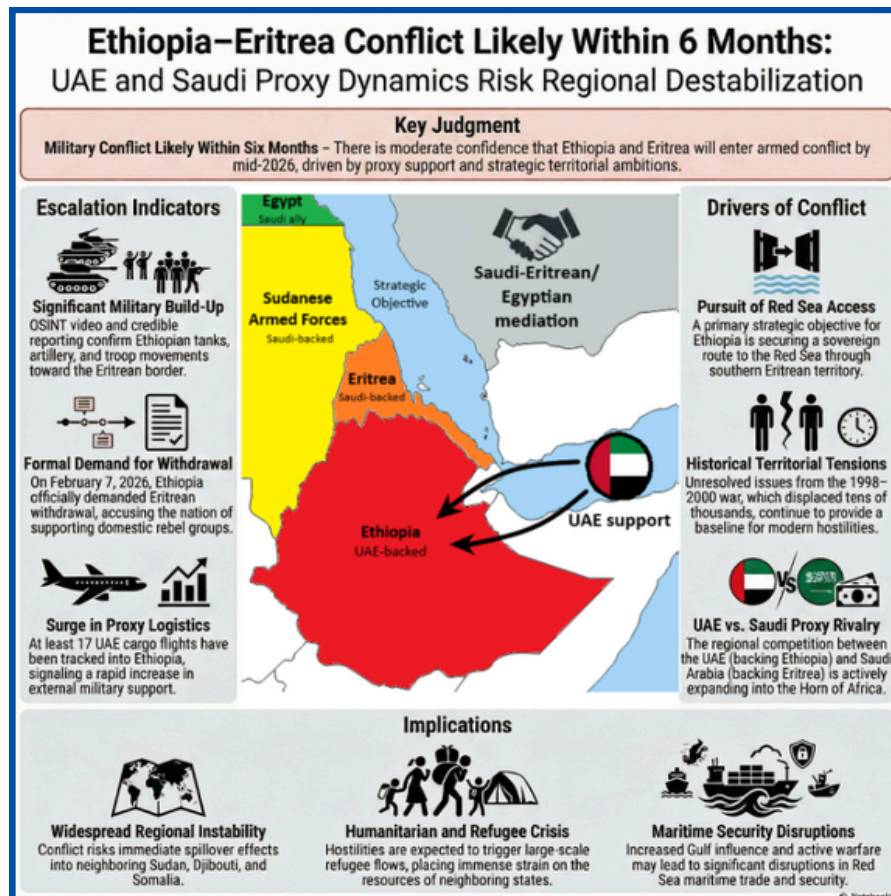
Author: Matthew Boyle

Editors: Hayley Page, Corey Black, Connor Colford, Vrin Giritharan, Katherine Millet, Julie Ferringer

---

*We assess with moderate confidence that a military conflict between Ethiopia and Eritrea, backed by the UAE and Saudi Arabia respectively, will occur within the next six months, which will further exacerbate the refugee crisis and put greater humanitarian strain on neighboring states.* Ethiopian leadership has made several threats towards territory in southern Eritrea, which, if successfully taken by Ethiopia, would give it access to the Red Sea.<sup>i</sup> Ethiopia and Eritrea waged a low-intensity border conflict from 2000 to 2018 after the Ethiopian-Eritrean War (1998-2000) before signing a peace treaty in 2018 and cooperating during the Tigray War (2020-22). Relations soured after the conflict. Eritrea was not involved in the peace deal that ended the fighting, and Ethiopian officials subsequently demanded that Eritrean forces withdraw from Ethiopian territory, where they claim Eritrea is supporting Ethiopian rebel groups.<sup>ii</sup> Ethiopia is aligned with the UAE, which backed the nation during the Tigray War, while Eritrea is supported by Saudi Arabia.<sup>iii</sup>

- A significant Ethiopian military presence, including tanks, artillery, armored personnel carriers, and large numbers of troops, is moving into northern states along the Eritrean border as of 19 March, according to videos posted on social media and reporting by a credible and reliable source.<sup>iv</sup>
- The previous Ethiopian-Eritrean War saw tens of thousands of refugees flee from the fighting and stretched Sudanese humanitarian resources thin in 2000, according to a reliable source with second-hand information.<sup>v</sup>
- The UAE has continued conducting cargo flights to Ethiopia despite the ongoing war with Iran, with at least 17 flights reported as of 23 March, according to a reliable source and open-source aircraft tracking sites.<sup>vi</sup>
- As of 6 February, Egypt, a Saudi ally, is attempting to broker a security deal between Saudi Arabia and Eritrea according to second-hand reporting from a reliable source that has previously demonstrated anti-Saudi bias.<sup>vii</sup>



*We assess with moderate confidence that the ongoing Saudi-UAE proxy war in Sudan will escalate through increased cross-border attacks, which will result in direct military intervention by neighboring states over the next 3-6 months.* The Sudanese Rapid Support Forces (RSF), backed by the UAE, are currently fighting the Saudi Arabia-backed Sudanese Armed Forces (SAF) in the third Sudanese Civil War.<sup>viii</sup> Since 2023, Saudi Arabia and the UAE have provided aid to their respective proxies in Sudan, and that support is unlikely to change.<sup>ix</sup>

- Over the past year, the UAE-backed Libyan National Army ground forces have supported RSF operations in Sudan, and UAE-aligned Ethiopia has launched drone strikes against the SAF in Sudan, according to the SAF and credible sources with secondhand access.<sup>x</sup>
- On 19 March, 2026, an unidentified UAV flew into Chad from Sudan and killed 17 people according to official statements and credible second-hand sources. Chad’s president publicly stated that his government would retaliate against any further attacks, according to credible sources with secondhand access.<sup>xi</sup>
- Saudi Arabia supplied artillery and ammunition to the SAF in 2023 and provided financial backing, according to a source with second-hand access.<sup>xii</sup> Saudi Arabia is also currently backing an arms deal between the SAF and Pakistan for weapons and fighter jets, according to a reliable source with second-hand access.<sup>xiii</sup>
- Egypt has clandestinely conducted airstrikes in Sudan against RSF and aligned forces, according to reporting from a reputable news agency using sources with first and second-hand access.<sup>xiv</sup> In addition, the Egyptian Ministry of Foreign Affairs has officially said that Cairo and Riyadh are aligned and “share identical views” on Sudan, according to a reliable second-hand source.<sup>xv</sup>



## Source Summary Statement

We make these assessments with moderate confidence, based on a body of reporting from credible sources with second-hand access, supported by official statements from the Chadian, Ethiopian, Sudanese, Egyptian, and Saudi governments and the historical pattern of Ethiopian-Eritrean fighting. The sources include well-established and trustworthy news organizations that have sources on the ground and analysis provided by experts in the Nile Basin region and military affairs. These sources are backed by open-source reporting from an analyst tracking developments via satellite imagery and public aircraft tracking sites. Several of the second-hand sources have shown bias towards one or more actors but have been corroborated with official reporting. There are key intelligence gaps of limited visibility into internal Saudi or Emirati decision-making and the exact degree of funding to their respective proxies in Sudan. However, the support for the SAF and RSF has been reported by ten of these sources, each with second-hand access to the information. Overall, the consistency of the reporting across numerous sources, including those with competing biases, has supported the conclusions of these assessments.

## Notes

<sup>i</sup> BBC News Africa | <https://www.youtube.com/watch?v=BrfX-L4PV5I> | Ethiopia: A Worse War Is Coming? BBC Africa | 27 February 2026 | News report detailing the growing risk of conflict in Ethiopia and the surrounding region, as well as the roles Saudi Arabia and the UAE are playing | Credible reporting from an established news agency backed on the ground first-hand reporting and second-hand sources from officials ; Matthew Mpoke Bigg | <https://www.nytimes.com/2026/03/04/world/africa/ethiopia-eritrea-war-tensions.html> | Ethiopia's Demand for Red Sea Access Drives Fears of New War With Eritrea | Article detailing Ethiopian territorial claims against Eritrea and recent history between the two nations | Credible reporting from an established news agency with second-hand sources with no known bias against either party

<sup>ii</sup> Al Jazeera | <https://www.aljazeera.com/news/2026/2/8/ethiopia-demands-eritrea-immediately-withdraw-troops-from-its-territory> | Ethiopia Demands Eritrea 'Immediately Withdraw' Troops From its Territory | 08 February 2026 | Article covering official statements by the Ethiopian Foreign Minister demanding the withdrawal of Eritrean forces from Ethiopia and ending their support for rebel groups, and how it is viewed in Eritrea as a threat | Moderate credibility, established news agency, but biases against Saudis and Emiratis previously seen, reliable for official statements. ; Matthew Mpoke Bigg | <https://www.nytimes.com/2026/03/04/world/africa/ethiopia-eritrea-war-tensions.html> | Ethiopia's Demand for Red Sea Access Drives Fears of New War With Eritrea | Article detailing Ethiopian territorial claims against Eritrea and recent history between the two nations | Credible reporting from an established news agency with second-hand sources with no known bias against either party

<sup>iii</sup> BBC News Africa | <https://www.youtube.com/watch?v=BrfX-L4PV5I> | Ethiopia: A Worse War Is Coming? BBC Africa | 27 February 2026 | News report detailing the growing risk of conflict in Ethiopia and the surrounding region, as well as the roles Saudi Arabia and the UAE are playing | Credible reporting from an established news agency backed on the ground first-hand reporting and second-hand sources from officials ; Al Jazeera | <https://www.aljazeera.com/news/2026/2/8/ethiopia-demands-eritrea-immediately-withdraw-troops-from-its-territory> | Ethiopia Demands Eritrea 'Immediately Withdraw' Troops From its Territory | 08 February 2026 | Article covering official statements by the Ethiopian Foreign Minister demanding the withdrawal of Eritrean forces from Ethiopia and ending their support for rebel groups, and how it is viewed in Eritrea as a threat | Moderate credibility, established news agency, but biases against Saudis and Emiratis previously seen, reliable for official statements.

<sup>iv</sup> Twitter/X | Rich Tedd | 19 March 2026 | <https://x.com/AfriMEOSINT/status/2024465296158052646> | Videos of significant amounts of Ethiopian forces moving towards the border region with Eritrea | Credible identification of equipment, users, and location through open sources

<sup>v</sup> David Gough | <https://www.theguardian.com/world/2000/may/30/ethiopia> | Ethiopian Planes Bomb Eritrean Capital as Refugee Crisis Grows | Article describing the refugee crisis triggered by the Ethiopian-Eritrean War in 2000 and impacts on surrounding nations | Credible reporting from a source with access to second-hand information

<sup>vi</sup> Twitter/X | Rich Tedd | 23 March 2026 | <https://x.com/AfriMEOSINT/status/2036132762256658759> | Tracking of flights out of the UAE to Ethiopia since the war with Iran started | Credible identification of flights, operators, and location through open sources



## Notes

<sup>vii</sup> Sean Matthews | <https://www.middleeasteye.net/news/egypt-and-saudi-arabia-focus-eritrea-uae-bolsters-ties-ethiopia> | Egypt and Saudi Arabia Focus on Eritrea as UAE Bolsters Ties to Ethiopia | 06 February 2026 | Article covering the relations between Egypt, Eritrea, and Saudi Arabia in the context of the Saudi-UAE proxy war | Moderate credibility, established news agency, but biases against Saudis and Emiratis previously seen

<sup>viii</sup> Center for Preventative Action | <https://www.cfr.org/global-conflict-tracker/conflict/power-struggle-sudan> | Civil War in Sudan | 16 March 2026 | Article summarizing the ongoing civil war in Sudan | Credible sourcing from a reliable non-profit organization with no known biases

<sup>ix</sup> Isaac Chotiner, Kristian Ulrichsen | <https://www.newyorker.com/news/q-and-a/the-growing-rift-between-saudi-arabia-and-the-uae> | The Growing Rift Between Saudi Arabia and the U.A.E. | 17 February 2026 | Discussion of the Saudi-UAE proxy war and its history | Credible source with first and second-hand knowledge of the conflict ; Twitter/X | Rich Tedd | 10 February 2026 | <https://x.com/AfriMEOSINT/status/2021321628966322439> | Drone footage reported from SAF that shows Chinese-made CH-95 drones and FK-2000 SAM systems in use by the RSF | Credible identification of equipment, users, and location

<sup>x</sup> Sudan News Agency | <https://suna-sd.net/posts/alsodan-ytabaa-dkhol-tayrat-bdon-tyar-mn-dakhl-alarady-alathyoby-ttaaaml-maa-ahdaf-dakhl-alsodan> | Sudan Warns Ethiopian Authorities Against the Entry of Drones Into Sudan From Within Ethiopia and Their Use Against Targets Inside Sudan | 02 March 2026 | Statement from Sudanese Foreign Ministry accusing Ethiopian drones attacking across the border | Moderate credibility, state-run news agency, likely bias against UAE-aligned groups, reliant on outside confirmation ; Twitter/X | Office of the Official Spokesperson for the Sudanese Armed Forces | 10 June 2025 | <https://x.com/SudaneseAF/status/1932485534217072845> | Press Release From the General Command of the Armed Force of Sudan | Statement from SAF accusing Libyan National Army of crossing the border to support RSF attacks | Moderate credibility, likely bias against UAE-aligned groups, reliant on outside confirmation ; Reuters | <https://www.reuters.com/business/media-telecom/sudan-accuses-ethiopia-first-time-involvement-its-civil-war-2026-03-03/> | Sudan Accuses Ethiopia For the First Time of Involvement in its Civil War | 03 March 2026 | Article discussing SAF accusations against Ethiopia and citing the probable location of the drone attacks | Credible reporting from an established news agency with first-hand sources on the ground ; Twitter/X | Rich Tedd | 08 June 2025 | <https://x.com/AfriMEOSINT/status/1931806608352493668> | Analysis of vehicles reported to belong to Libyan National Army captured by SAF after crossing the border | Credible identification of equipment, users, and location

<sup>xi</sup> Reuters | <https://www.reuters.com/world/africa/drone-attack-sudan-kills-17-chad-chadian-government-says-2026-03-19/> | Drone Attack From Sudan Kills 17 in Chad, Chadian Government Says | 19 March 2026 | Article discussing an unidentified drone attack in Chad and the government's response | Credible reporting from an established news agency with first-hand sources on the ground and official government statements

<sup>xii</sup> Intelligence Online | <https://www.intelligenceonline.com/middle-east-and-africa/2026/02/13/riyadh-sent-heavy-artillery-to-sudanese-forces-battling-uae-backed-rebels,110627398-art> | Riyadh Sent Heavy Artillery to Sudanese Forces Battling UAE-Backed Rebels | 13 February 2026 | Reporting confirming the donation of M777 artillery pieces to Sudan by Saudi Arabia in 2023 and 2024 along with ammunition and training for the weapons | Credible reporting with reliable second-hand sources

<sup>xiii</sup> Saad Sayeed and Mubasher Bukhari | <https://www.reuters.com/business/aerospace-defense/pakistan-nears-15-billion-deal-supply-weapons-jets-sudan-sources-say-2026-01-09/> | Exclusive: Pakistan Nears \$1.5 Billion Deal to Supply Weapons, Jets to Sudan, Sources Say | Article describing an arms deal between Pakistan and Sudan for the delivery of fighter jets and weapons backed by the Saudis | Credible reporting from an established news agency with second-hand sources in governments involved in the deal



## Notes

<sup>xiv</sup> Declan Walsh, Malachy Browne, Eric Schmitt and Nick Cumming-Bruce | <https://www.nytimes.com/2026/02/01/world/africa/egypt-sudan-drones.html> | The Secret Egyptian Air Base Behind Sudan's Drone War | 01 February 2026 | Article detailing a clandestine Egyptian drone base near the Sudanese border that took part in strikes against supply convoys to the RSF from Libya | Credible reporting from an established news agency with first-hand sources on the ground and a significant number of second-hand source in official positions

<sup>xv</sup> Al Jazeera | <https://www.aljazeera.com/news/2026/1/5/egypt-says-it-shares-identical-views-with-saudi-arabia-on-yemen-sudan> | Egypt Says it Shares 'Identical' Views With Saudi Arabia on Yemen, Sudan | 05 January 2026 | Article summarizing Egyptian statement and regional alliances | Moderate credibility, established news agency, but biases against Saudis and Emiratis previously seen, reliable for official statements.



# State-Linked Actors Likely to Continue Hybrid Attacks on Arctic Infrastructure Over the Next Six Months as NATO Increases Arctic Presence

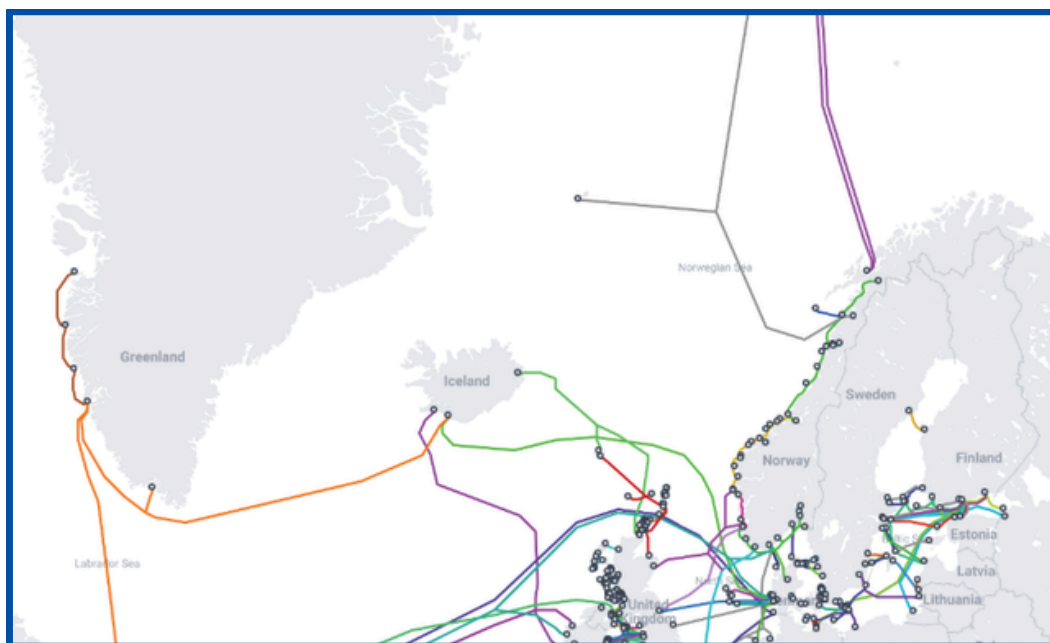
Author: Rohan Singh

Editors: Hayley Page, Corey Black, Connor Colford, Vrin Giritharan, Katherine Millet, Julie Ferringer

*We assess with moderate confidence that Chinese and Russia-linked actors will conduct further hybrid attacks on Arctic energy assets and undersea cable infrastructure over the next six months in an effort to destabilize Europe.<sup>i</sup>*

Accelerating sea-ice loss is eroding the Arctic's long-standing natural barriers, exposing critical communications, intelligence, and energy infrastructure to disruption. As strategic competition intensifies, particularly in the context of the ongoing Russia–Ukraine War and conflict in the Middle East, this newly accessible environment likely presents a growing vulnerability.<sup>ii</sup>

- Government officials across Arctic nations have warned of rising espionage by Russia and China, in some cases in collaboration, to map undersea cables and pipelines owned by the European Union and private companies, according to news sources with secondhand access and reliable track records of reporting for Arctic nations.<sup>iii</sup>
- Government officials in Arctic Nations have linked increased Chinese and Russian presence in the Arctic to attacks that severed undersea cables and pipelines, such as two attacks in 2023 and three in 2024, according to secondhand reputable news sources and analysis from credible think tanks.<sup>iv</sup> Government officials in Arctic nations have also linked several cable disruptions in 2022, some of which remain unattributed, to the presence of Chinese and Russian vessels in the region, according to a reliable news source with secondhand access and analysis from credible think tanks.<sup>v</sup>
- Between 31 December 2025 to 5 January 2026, six cables were severed across the near Arctic. The former deputy director of Estonia's foreign-intelligence agency publicly attributed these attacks to Russia, according to a secondhand news source with a reliable track record for reporting international affairs.<sup>vi</sup>
- Hybrid attacks committed by Russia are also occurring elsewhere across Europe.<sup>vii</sup> Russia's preferred strategy during the Russia-Ukraine War has been strategic sabotage through hybrid attacks, according to a secondhand reputable news source and analysis from a credible think tank.<sup>viii</sup>



*A map of Arctic and near-Arctic undersea cables as of 1 April 2026.<sup>ix</sup>*



# Rising Practitioners

*We assess with moderate confidence that NATO will increase investment in protective measures for Arctic and near-Arctic infrastructure over the next six months to reduce the risk of disruption to infrastructure networks critical to regional stability and alliance operations.* NATO member states have face coordination challenges in agreeing on a unified response to Russian and Chinese hybrid attacks, with some European allies hesitant to attribute incidents to Russia.<sup>x</sup> Consequently, Russia and China likely continued testing the boundaries, with several incidents affecting critical infrastructure occurred throughout 2025, including disruptions in Norway, Finland, and Latvia.<sup>xi</sup> Yet authorities working with NATO operations only seized one vessel following suspected undersea cable sabotage in December 2025.<sup>xii</sup> In the face of the persistent threat, NATO has likely increasingly identified the Arctic and near-Arctic as areas of growing strategic competition, driving efforts to expand measures for critical infrastructure.<sup>xiii</sup>

- NATO launched Operation Baltic Sentry in January 2025 and Operation Arctic Sentry in February 2026 to protect Baltic and Arctic infrastructure, demonstrating an expansion of operational efforts to counter hybrid threats targeting critical infrastructure.<sup>xiv</sup>
- In October 2025, NATO opened the Combined Air Operations Center in Norway, increasing its operational awareness and flexibility. In 2026, NATO announced the Forward Land Forces to establish a military presence in Finland, according to an official NATO statement.<sup>xv</sup>
- NATO announced the Maritime Centre for Security of Critical Undersea Infrastructure (MCSCUI) in May 2024 to address hybrid threats in the Arctic and near-Arctic. The Director of the MCSUI stated in January 2025 this was not yet fully operational, but its establishment reflects NATO's prioritization of protecting critical undersea infrastructure, according to secondhand reporting from a reliable news source.<sup>xvi</sup>

## Source Summary Statement

We make these assessments with moderate confidence based on reporting from diverse sources which are credible and corroborated by other sources. These assessments largely use publicly available sources with second-hand access. Sources with first-hand access, official statements from NATO and government officials, further support the analysis. As this is open-source analysis about clandestine activity there are some gaps in understanding the intent of the state-linked actors conducting the activity and in understanding the potentially classified countermeasures taken by the nations targeted by this activity.

## Notes

<sup>i</sup> Lara Jakes | <https://www.nytimes.com/2025/08/19/world/europe/russia-hybrid-attacks-europe.html> | Sabotage Shows How Russia's Hostility Toward Europe Goes Beyond Ukraine | 19 August 2025 | Geopolitical analysis of Russia's tactics thus far. ; Maksym Beznosiuk and William Dixon | <https://www.globsec.org/what-we-do/commentaries/how-russias-hybrid-warfare-will-escalate-2026-and-what-europe-must-do> | How Russia's Hybrid Warfare Will Escalate in 2026 and What Europe Must Do? | 13 January 2026 | Analysis by seasoned security officials published by a think tank.

<sup>ii</sup> Max Bergman, Otto Svendsen, et al. | <https://www.csis.org/analysis/defending-north-amid-rising-geopolitical-tensions> | Defending the North Amid Rising Geopolitical Tensions | 14 January 2025 | p. 8 | Reliable analysis about Arctic and near Arctic security threats.

<sup>iii</sup> Leyland Cecco | <https://www.theguardian.com/world/2025/nov/13/canada-arctic-spy-threats-russia-china> | Canada Says Russia and China are Ramping up Spy Efforts in Arctic region | Firsthand source of intelligence. ; Elías Thorsson | <https://www.arctictoday.com/nato-official-warns-of-growing-undersea-threats-infrastructure-vulnerabilities/> | NATO Official Warns of Growing Undersea Threats, Infrastructure Vulnerabilities | 29 January 2025 | Arctic focused publication.

<sup>iv</sup> Max Bergman, Otto Svendsen, et al. | <https://www.csis.org/analysis/defending-north-amid-rising-geopolitical-tensions> | Defending the North Amid Rising Geopolitical Tensions | 14 January 2025 | p. 8 | Reliable analysis about Arctic and near Arctic security threats. ; Christy Cooney | <https://www.bbc.com/news/articles/c748210k82wo?accountMarketingPreferences=off> | Sweden asks China to co-operate over severed cables | 29 November 2024 | Secondhand source covering China's involvement in a cable severing incident. ; Max Bergman, Otto Svendsen, et al. | <https://www.csis.org/analysis/defending-north-amid-rising-geopolitical-tensions> | Defending the North Amid Rising Geopolitical Tensions | 14 January 2025 | p. 8 | Reliable analysis about Arctic and near Arctic security threats.



## Notes

<sup>v</sup> Michael Paul | <https://www.swp-berlin.org/en/publication/chinas-arctic-turn> | China's Arctic Turn | 8 February 2025 | Reliable analysis of China's moves toward the Arctic. ; Stephanie Pezard, Irina A. Chindea, et al. | [https://www.rand.org/pubs/research\\_reports/RRA2823-1.html](https://www.rand.org/pubs/research_reports/RRA2823-1.html) | China's Economic, Scientific, and Information Activities in the Arctic | 23 January 2025 | Geopolitical analysis and predictions of China's turn to the Arctic. ; Lara Jakes | <https://www.nytimes.com/2025/08/19/world/europe/russia-hybrid-attacks-europe.html> | Sabotage Shows How Russia's Hostility Toward Europe Goes Beyond Ukraine | 19 August 2025 | Geopolitical analysis of Russia's tactics thus far.

<sup>vi</sup> The Economist | <https://www.economist.com/europe/2026/01/06/a-rash-of-baltic-cable-cutting-raises-fears-of-sabotage> | A rash of Baltic cable-cutting raises fears of sabotage | 6 January 2026 .

<sup>vii</sup> Lara Jakes | <https://www.nytimes.com/2025/08/19/world/europe/russia-hybrid-attacks-europe.html> | Sabotage Shows How Russia's Hostility Toward Europe Goes Beyond Ukraine | 19 August 2025 | Geopolitical analysis of Russia's tactics thus far.

<sup>viii</sup> Lara Jakes | <https://www.nytimes.com/2025/08/19/world/europe/russia-hybrid-attacks-europe.html> | Sabotage Shows How Russia's Hostility Toward Europe Goes Beyond Ukraine | 19 August 2025 | Geopolitical analysis of Russia's tactics thus far. ; Eric Rosenbach, Carlo Giannone, et al. | <https://www.belfercenter.org/research-analysis/russia-nato-baltics-scenarios-europe-security> | Russian Threats to NATO's Eastern Flank: Scenarios, Strategy, and Policy for European Security | 05 February 2026 | Analysis of Russian Grey Zone/Hybrid Warfare techniques.

<sup>ix</sup> Telegeography | <https://www.submarinecablemap.com/> | Submarine Cable Map | 6 April 2026 | Licensed under the Creative Commons License: Attribution-ShareAlike 4.0 International (CC BY-SA 4.0).

<sup>x</sup> Lara Jakes | <https://www.nytimes.com/2025/08/19/world/europe/russia-hybrid-attacks-europe.html> | Sabotage Shows How Russia's Hostility Toward Europe Goes Beyond Ukraine | 19 August 2025 | Geopolitical analysis of Russia's tactics thus far.

<sup>xi</sup> Lara Jakes | <https://www.nytimes.com/2025/08/19/world/europe/russia-hybrid-attacks-europe.html> | Sabotage Shows How Russia's Hostility Toward Europe Goes Beyond Ukraine | 19 August 2025 | Geopolitical analysis of Russia's tactics thus far. ; Nerijus Adomaitis | <https://www.worldenergynews.com/news/norway-spy-chief-accuses-russian-hackers-dam-764396> | Norway Spy Chief Accuses Russian hackers of Dam Sabotage April | 13 August 2025 | Firsthand intelligence from author that covers Northern Europe. ; Inese Janova | <https://www.esakari.lv/lv/jaunumi/sia-elektroniskie-sakari-kopa-ar-partnervalstim-iesniegusi-precizus-gnss-traucejumu> | SIA "Elektroniskie sakari" together with partner countries has submitted precise evidence of GNSS interference for international action | 08 August 2025 Press release from Latvian radio frequency operator.

<sup>xii</sup> Gabriela Pommeroy | <https://www.bbc.com/news/articles/c62040np372o> | Finnish Police Seize Ship Suspected of Sabotaging Undersea Cable | 31 December 2025 | Secondhand account and analysis.

<sup>xiii</sup> NATO | <https://www.nato.int/en/what-we-do/deterrence-and-defence/arctic-security> | Arctic Security | 16 February 2026 | Firsthand source of NATO's work on Arctic security.

<sup>xiv</sup> NATO | <https://shape.nato.int/operations/operations-and-missions/baltic-sentry> | Baltic Sentry | January 2025 | Firsthand source. ; NATO | <https://www.nato.int/en/what-we-do/deterrence-and-defence/arctic-security> | Arctic Security | 16 February 2026 | Firsthand source of NATO's work on Arctic security.

<sup>xv</sup> NATO | <https://www.nato.int/en/what-we-do/deterrence-and-defence/arctic-security> | Arctic Security | 16 February 2026 | Firsthand source of NATO's work on Arctic security.

<sup>xvi</sup> Elías Thorsson | <https://www.arctictoday.com/nato-official-warns-of-growing-undersea-threats-infrastructure-vulnerabilities/> | NATO Official Warns of Growing Undersea Threats, Infrastructure Vulnerabilities | 29 January 2025 | Arctic focused publication.



# Macron's Advanced Deterrence Doctrine Likely to Deepen Eastern European Engagement, Fracturing EU-Wide Nuclear Cohesion

Author: Cameron Goldman

Editors: Hayley Page, Corey Black, Connor Colford, Vrin Giritharan, Katherine Millet, Julie Ferringer

---

*We assess Eastern and Northern European states, particularly Germany and Poland, will likely deepen engagement with France on an advanced deterrence framework over the next 3–6 months to strengthen nuclear security cooperation along NATO's eastern flank.* President Emmanuel Macron's March 2026 speech on the future of French nuclear deterrence paved the way for a Franco-German joint declaration announcing a formalized bilateral nuclear steering group.<sup>i</sup> The framework proposes joint nuclear deterrence exercises, potential temporary deployment of French nuclear-capable aircraft to partner territories, and structured strategic consultations, all while France retains sole launch authority. According to Macron, the initiative is intended to complement NATO by strengthening the organization's nuclear mission.<sup>ii</sup> Additional participants are considering joining, including Poland, Denmark, Belgium, Greece, Sweden, and the Netherlands.<sup>iii</sup> These partners likely share a threat perception vis-à-vis Russia that creates incentives for sustained engagement regardless of doctrinal or legal complications.<sup>iv</sup>

- Berlin committed to conventional participation in French nuclear exercises and joint visits to strategic sites, according to a highly credible nonpartisan international wire service with first-hand access to the joint Franco-German declaration and a sustained track record of accurate reporting on European security developments.<sup>v</sup>
- Poland's Prime Minister Donald Tusk publicly confirmed Warsaw had entered formal talks with France over joining the advanced deterrence program. Poland's president previously called for an independent European nuclear deterrent in February 2026, according to a reliable independent English-language outlet specializing in Polish political and security affairs with second-hand access to official government statements.<sup>vi</sup>
- Denmark and Belgium both issued public statements welcoming Macron's proposed framework, with Belgium's Prime Minister characterizing it as an important step toward stronger European defense, according to a credible pan-European broadcaster with second-hand access to partner government communiqués and a pro-EU integrationist bias.<sup>vii</sup>

*We assess that Southern and Western European resistance, led by Spain, will likely constrain Macron's advanced deterrence doctrine, preventing a unified EU-wide nuclear posture over the next 3–6 months.* Southern and Western European states have historically prioritized NATO's existing nuclear architecture over parallel European frameworks, expressing concern that autonomous initiatives risk duplicating or complicating established alliance structures even when framed as complementary.<sup>viii</sup> This division reflects a broader fault line within the EU between states that perceive an immediate Russian threat and those insulated by geography and political orientation from that same urgency. Macron's doctrine will therefore likely consolidate into a northeastern coalition rather than a pan-European architecture within the forecast window.<sup>ix</sup>

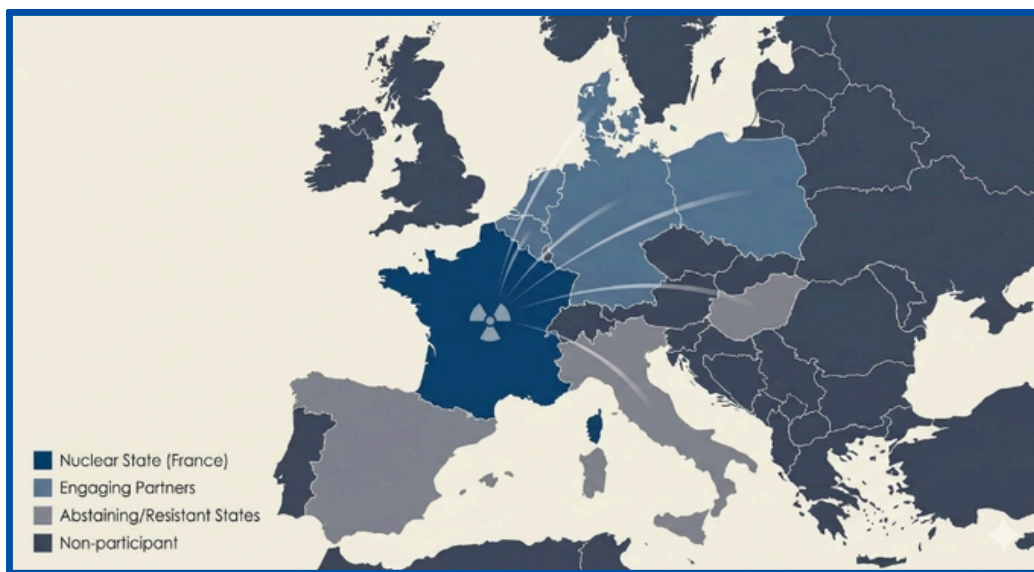
- Spain formally declined to participate in Macron's advanced deterrence framework, according to a regional English-language European outlet with third-hand access to national government statements, corroborated by first-hand reporting from major international newswires present at the announcement.<sup>x</sup>
- Polling data indicates that Hungarian and Italian publics consistently prefer continued reliance on the United States for nuclear deterrence over an independent European framework, contrasting sharply with polling from most other European states, according to the European Council on Foreign Relations' survey: a credible independent senior-level European security network with sustained access to pan-European public opinion data.<sup>xi</sup>



## Rising Practitioners

*We assess that tensions will likely emerge regarding compliance with the Treaty on the Non-Proliferation of Nuclear Weapons (NPT), which will cause friction between nuclear-cooperating European states and non-nuclear signatories over the next 3–6 months.* A central point of contention revolves around launch authority. Under Macron's proposed doctrine, the decision to deploy nuclear weapons remains solely with the French President, creating legal and political ambiguity around what cooperation means for partner states. All eight participants in Macron's advanced deterrence framework - Germany, Poland, Denmark, Belgium, the Netherlands, Sweden, Greece, and France - are signatories to the NPT, which prohibits the transfer of nuclear weapons control.<sup>xiii</sup> Spain and Italy will likely use NPT compliance concerns to justify non-participation.<sup>xiii</sup>

- The International Campaign to Abolish Nuclear Weapons assessed that Macron's doctrine represents a significant step backward considering France's NPT obligations, which commit nuclear-armed states to pursue disarmament rather than expansion. The assessment from a Nobel Peace Prize-winning disarmament advocacy organization carries transparent normative bias but its factual claims regarding treaty law are corroborated by independent legal sources.<sup>xiv</sup>
- The February 2026 expiration of the Strategic Arms Reduction Treaty has intensified European anxieties about strategic stability, creating the broader arms control vacuum within which European states are receiving Macron's initiative. This context likely will amplify NPT compliance scrutiny at the 2026 NPT Review Conference, according to a credible independent international research institute with first-hand access to government briefings and treaty documentation.<sup>xv</sup>



*European Nuclear Engagement Under Macron's Advanced Deterrence Doctrine, March 2026.<sup>xvi</sup>*

### Source Summary Statement

This assessment draws on ten open-source references spanning international wire services, specialist defense publications, state-affiliated media, independent policy research institutions, academic journals, and disarmament advocacy organizations. This assessment places evidentiary weight on Associated Press reporting by Sylvie Corbet and Samuel Petrequin, Defense News analysis by Rudy Ruitenberg, SIPRI nuclear force data by Hans M. Kristensen and Matt Korda, Notes from Poland reporting by Daniel Tilles, and peer-reviewed analysis published in Survival by Heloise Fayet, Andrew Futter, and Ulrich Kuhn, all of which carry high credibility and reliability ratings. Key intelligence gaps include the non-public contents of bilateral consultations between France and partner states, the classified details of France's warhead expansion timeline and production capacity, and the internal deliberations of skeptical states such as Spain and Italy. Open-source material precludes visibility into private diplomatic channels, where key actors are likely to make the most consequential near-term decisions. Our overall confidence in the evidentiary basis is moderate, reflecting a strong foundation of credible open-source reporting on public signals and official statements, offset by limited visibility into the operational and diplomatic processes that will determine the pace and depth of partner engagement.



# Rising Practitioners

---

## Notes

- <sup>i</sup> Sylvie Corbet and Samuel Petrequin | <https://thehill.com/policy/international/emmanuel-macron-france-nuclear-armed-jets/> | Macron Opens Door to Deploying French Nuclear Assets to European Allies | 02 March 2026
- <sup>ii</sup> Sylvie Corbet and Samuel Petrequin | <https://thehill.com/policy/international/emmanuel-macron-france-nuclear-armed-jets/> | Macron Opens Door to Deploying French Nuclear Assets to European Allies | 02 March 2026
- <sup>iii</sup> Sylvie Corbet and Samuel Petrequin | <https://thehill.com/policy/international/emmanuel-macron-france-nuclear-armed-jets/> | Macron Opens Door to Deploying French Nuclear Assets to European Allies | 02 March 2026
- <sup>iv</sup> Sylvie Corbet and Samuel Petrequin | <https://thehill.com/policy/international/emmanuel-macron-france-nuclear-armed-jets/> | Macron Opens Door to Deploying French Nuclear Assets to European Allies | 02 March 2026
- <sup>v</sup> Daniel Tilles | <https://notesfrompoland.com/2026/03/02/poland-in-talks-with-france-over-joining-nuclear-deterrence-programme/> | Poland in Talks with France Over Joining Nuclear Deterrence Programme | 02 March 2026
- <sup>vi</sup> Daniel Tilles | <https://notesfrompoland.com/2026/03/02/poland-in-talks-with-france-over-joining-nuclear-deterrence-programme/> | Poland in Talks with France Over Joining Nuclear Deterrence Programme | 02 March 2026
- <sup>vii</sup> Sophia Khatsenkova | <https://www.euronews.com/2026/03/02/macron-orders-nuclear-warhead-increase-and-unveils-advanced-deterrence-plan-for-europe/> | Macron Orders Nuclear Warhead Increase and Unveils Advanced Deterrence Plan for Europe | 02 March 2026
- <sup>viii</sup> Molly Grace | <https://euroweeklynews.com/2026/03/03/europe-divided-as-france-advances-nuclear-deterrence-and-spain-rejects-rearmament/> | Europe Divided as France Advances Nuclear Deterrence and Spain Rejects Rearmament | 03 March 2026
- <sup>ix</sup> Rudy Ruitenbergh | <https://www.defensenews.com/global/europe/2026/03/02/macron-opens-door-to-deploying-french-nuclear-assets-to-european-allies/> | Macron Opens Door to Deploying French Nuclear Assets to European Allies | 02 March 2026
- <sup>x</sup> Molly Grace | <https://euroweeklynews.com/2026/03/03/europe-divided-as-france-advances-nuclear-deterrence-and-spain-rejects-rearmament/> | Europe Divided as France Advances Nuclear Deterrence and Spain Rejects Rearmament | 03 March 2026
- <sup>xi</sup> Jana Baldus | <https://europeanleadershipnetwork.org/commentary/how-opposing-views-on-nuclear-deterrence-fracture-the-non-proliferation-regime/> | How Opposing Views on Nuclear Deterrence Fracture the Non-Proliferation Regime | 01 January 2025
- <sup>xii</sup> ICAN | [https://www.icanw.org/2026\\_french\\_nuclear\\_doctrine\\_german\\_cooperation](https://www.icanw.org/2026_french_nuclear_doctrine_german_cooperation) | France's Nuclear Doctrine and European Cooperation | 02 March 2026
- <sup>xiii</sup> Jana Baldus | <https://europeanleadershipnetwork.org/commentary/how-opposing-views-on-nuclear-deterrence-fracture-the-non-proliferation-regime/> | How Opposing Views on Nuclear Deterrence Fracture the Non-Proliferation Regime | 01 January 2025
- <sup>xiv</sup> ICAN | [https://www.icanw.org/2026\\_french\\_nuclear\\_doctrine\\_german\\_cooperation](https://www.icanw.org/2026_french_nuclear_doctrine_german_cooperation) | France's Nuclear Doctrine and European Cooperation | 02 March 2026
- <sup>xv</sup> Hans M. Kristensen and Matt Korda | <https://www.sipri.org/yearbook/2025/06> | SIPRI Yearbook 2025, Chapter 6: World Nuclear Forces | 01 June 2025
- <sup>xvi</sup> Google Gemini | AI-Generated Graphic | European Nuclear Engagement Under Macron's Advanced Deterrence Doctrine | 31 March 2026 | Prompt authored by Cameron Goldman; graphic generated by Google Gemini AI image generation tool.

# Contact Information



Email  
[aurora@american.edu](mailto:aurora@american.edu)



Website  
[www.american.edu/spa/aurora/](http://www.american.edu/spa/aurora/)

