



Global Intelligence Summary

REPORTING PERIOD: 25 – 02 OCTOBER





Global Intelligence Summary

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Americas (AMER)

Civil unrest in **Ecuador** is **highly likely** to continue following the government's decision to cut fuel subsidies that have been in place since 1974.

Reported **US** plans to authorise drone strikes within **Venezuela** will **almost certainly** be leveraged by Maduro to consolidate power, and would **highly likely** increase the threat of arbitrary detention to Western nationals.

Europe, Middle East & Africa (EMEA)

The **Israeli** raids on the Global Sumud Flotilla are highly likely to provoke unrest in **Italy, France, Spain**, and other European countries. It is **highly likely** that the unrest will continue between 2 and 5 October.

Washington's approval of intelligence for **Ukraine** to conduct long-range strikes against Russian energy infrastructure **highly likely** signals approval of the campaign, which could expand with the provision of Tomahawk.

The refusal of Hezbollah's leader to fully disarm will **likely** result in Hezbollah further developing asymmetric capabilities and could increase the risk of internal conflict in **Lebanon**.

The Hamas leadership in **the Gaza Strip** is **likely** to reject the newly announced "20-point" peace plan, as the group **highly likely** sees it as a blueprint that will strip it of its control over Gaza.

A successful attack on a **Dutch**-flagged vessel in the **Gulf of Aden** **likely** indicates that the Houthis can identify, track and target vessels of interest despite the suspension of AIS and implementation of other countermeasures.

Widely shared video of police van hitting and injuring protester **highly likely** to further inflame Gen Z-led demonstrations in **Morocco**.

Protests are **highly likely** to continue in **Madagascar** despite the president's dissolution of parliament and promise of a new prime minister.

Asia-Pacific (APAC)

The Taliban's decision to impose a nationwide internet and telecommunication blackout will **almost certainly** result in a deterioration in the humanitarian situation in **Afghanistan** and major disruption to critical services.

A magnitude 6.9 earthquake that caused major damage in northern **Cebu** is the deadliest earthquake to impact the **Philippines** in years, and will **likely** galvanise the protest movement against corruption in disaster resiliency.



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Americas (AMER)

Ecuador: One dead and the president's convoy attacked in violent clashes over fuel prices.

A national strike in Ecuador has escalated into clashes between protesters and security forces. The strike began on 22 September, called by Ecuador's largest indigenous rights organisation, Confederation of Indigenous Nationalities of Ecuador (CONAIE), over President Daniel Noboa's move to cut fuel subsidies and plans to expand mining concessions and reopen oil bidding in the Amazon. On 22 September, protesters closed major roads in the provinces of Carchi, Pichincha, Cotopaxi, and Chimborazo. In and around Quito, several roads have been blocked, including Avenida América, the Cajas sector in the canton of Cayambe, and portions of the Pan-American Highway connecting Quito to Sierra.

The strikes have resulted in violent clashes, with farmers, Indigenous groups, and transport unions clashing with security forces outside Tabacundo on 24 September. On 25 September, a prison riot took place, resulting in the deaths of 17 inmates. On 28 September, one protester was shot dead and 12 soldiers were injured in clashes in the Andean region north of Quito on 28 September. Over 80 were arrested, with 13 facing terrorism charges.

The situation significantly escalated on 30 September, when approximately 350 protesters attacked a humanitarian convoy led by Noboa and took 17 soldiers hostage. The convoy, which included UN and EU diplomats, was in Cotacachi, Imbabura province, en route to deliver aid to communities affected by the strike. Following the attack, the military accused the attackers of being "terrorist groups" and warned that "acts like these will not go unpunished". By 1 October, however, all 17 soldiers were released.

A state of emergency has been declared in eight of Ecuador's 24 provinces, and a nighttime curfew in five provinces. Noboa has claimed that the Venezuelan cartel-origin transnational gang Tren de Aragua was behind the demonstrations and that protesters breaking the law will be charged with "terrorism" and face a 30-year sentence. The government has temporarily moved the presidency and vice presidency to Latacunga and Otavalo, resulting in an increased military presence in these cities.

Following the attack on the convoy, protests have subsided. On 30 September, the government of Imbabura agreed to talk with indigenous protesters to end the demonstrations. On 1 October, the government announced that it is close to signing an agreement with indigenous organisations to end the strike.



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Solace Global Assessment: The government has long subsidised fuel to keep domestic prices low, after first implementing the subsidies in 1974. This was enabled by Ecuador’s oil boom in the 1970s, but rising consumption, international oil price volatility, and increasing fiscal strain have made subsidies harder to sustain. The subsidies comprise a large share of public resources, costing approximately USD 2.2465 billion in 2023. Subsidies have almost certainly limited the government’s capacity to invest in health, education, infrastructure, and social programs. The government has announced mitigating measures, including direct support for the transport sector and compensation for commercial transport for three months, as well as the assurance that the funds would be redistributed to other sectors. However, protesters have viewed the measures as in line with broader austerity measures from the government that are likely to increase the cost of living.

The national strike marks the second phase of unrest, which began when Noboa announced the immediate removal of the fuel subsidy, raising prices from USD 1.80 to USD 2.80 per gallon on 12 September. The first phase resulted in widespread protests across the country from 16 September, resulting in the government imposing curfews and deploying the military to reinforce cities. CONAIE is historically influential in national politics, particularly in rural and Andean areas, having led demonstrations that overthrew three presidents between 1997 and 2005. In 2019 and 2022, CONAIE successfully led large-scale demonstrations when the government previously attempted to eliminate fuel subsidies.

While there is a realistic possibility that the government will appease protesters with concessions, Noboa has insisted that the subsidy cut is irreversible and non-negotiable. CONAIE will likely be emboldened by previous successes, as well as the ongoing large-scale mobilisations against the fuel subsidies. If the government fails to address the group’s demands, including a full repeal of Executive Decree 126, a reduction of VAT from 15 to 12 per cent, and halting mining and extractive industry expansion, CONAIE is expected to call for additional strikes, prolonging the unrest.

Venezuela: US reportedly planning strikes within Venezuela.

The US Department of War is reportedly drawing up options for military strikes against narcotics-related targets within the borders of Venezuela. The proposed strikes will target drug traffickers, leadership figures, and labs, with an emphasis on drone strikes. The plans have not received presidential authorisation, but inside sources suggest that such actions could begin within weeks. The Trump administration is reportedly justifying the actions in response to Venezuelan President Nicolas Maduro’s failure to curtail drug flows from Venezuela to the US.

Solace Global Assessment: The plans follow the recent designation of the Venezuelan-origin gang, Tren de Aragua, as a Foreign Terrorist Organisation (FTO); an increase of the reward that leads to the arrest of Maduro; multiple threats from the Trump administration; and most critically, the large-scale deployment of US naval assets to the Caribbean and at least three US drone strikes on suspected narcotics-laden vessels in international waters but suspected of originating from



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Venezuela. These actions likely illustrate that the Trump administration is willing to use lethal force to reduce the flow of narcotics into the US.

A pivot towards drone strikes within Venezuelan territory or even Venezuelan waters would mark a major escalation and would almost certainly be condemned by the international community, regional partners and Venezuela's allies like Russia, China and Iran. The US is likely exploring alternative measures to pressure Maduro into reducing the flow of narcotics, such as sanctions, diplomacy or increased interdictions at sea. However, if no measurable reduction in narcotics flow is observed, and diplomatic or economic pressures fail, there is a realistic possibility that the Trump administration will authorise lethal force within Venezuelan territory. Moreover, the Trump administration has threatened to conduct unilateral military action against drug gangs and cartels in other countries, most importantly Mexico. Strikes in Venezuela could be used as an initial test case and also leveraged to send a strategic message to other nations that are perceived to have failed in reducing drug flow into the US.

There are multiple ways in which Maduro could react to US strikes. Limited drone strikes are unlikely to result in war, as Venezuela lacks the conventional military capability to challenge the US and would likely be reluctant to provide the US with justification to pursue escalatory operations that could threaten regime survival. Any strikes are likely to be perceived as an attack on Venezuelan sovereignty and will likely promote a rally around the flag reaction. This will likely strengthen Maduro's position and could be used to help further consolidate his power through the implementation of states of emergency or expanded emergency powers. It could also be used to justify a crackdown on any domestic opposition or foreign influence.

This is likely to result in the suppression of foreign NGOs or businesses deemed subversive and will likely result in a major increase in arbitrary detention or hostage diplomacy, whereby foreign nationals, especially Westerners, could be detained under vague national security pretexts and leveraged as bargaining chips in future negotiations. The planned strikes could also result in Venezuela reducing counter-narcotics operations or leveraging Venezuelan gangs abroad to apply asymmetric pressure on US interests.

AMER Summary and Forecast

Politics, Economics and Civil Unrest:

US government shuts down for the first time since December 2018.

At midnight on 1 October, the US federal government entered a "shutdown" after representatives failed to agree on a federal services spending package. A shutdown denotes a period in which all non-essential federal government functions



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are frozen, and often entails hundreds of thousands of government staff being furloughed. The shutdown, which is a rare and high-visibility event, has a realistic possibility of driving civil unrest in Washington, D.C., in the immediate term. While most shutdowns are resolved in a matter of days, recent ones have at times extended for weeks. Due to the compounding impacts of the funding halt for federal programmes, the likelihood of more diffuse civil unrest will increase in the short to medium term if the shutdown remains in place.

Venezuelan President Maduro signs decree expanding security powers.

On 29 September, Maduro issued a decree allowing him to mobilise the country's armed forces and grant them authority over Venezuela's public services and oil sector in response to "external aggression". The decree was likely triggered by the recent buildup of US military assets, including approximately 6,500 troops in the Caribbean, as well as the growing threat of direct US strikes on Venezuelan territory. Even in the absence of direct confrontation with the US, the decree is likely to further solidify the centralisation of Venezuela's state institutions under Maduro. The focus on the oil industry almost certainly reflects the sector's importance for the government to maintain the military's support. Since 2018, the top positions of the country's state-run oil company PDVSA have been staffed by high-ranking military officials.

Youth-led protests over pension reform continue in Lima, Peru.

Youth-led protests over pension reform have continued in Lima, Peru. On 27 September, human rights networks reported at least 18 people were injured in clashes with police, with tear gas being deployed in the Plaza San Martín area. Additionally, there were incidents of property damage, such as crowds tearing down construction site barriers. On 29 September, the police used tear gas and rubber bullets to disperse protestors in the Acho area of Lima, resulting in at least one injury. The same day, local media shared footage of demonstrators attempting to dismantle barricades in front of the Congress building, likely indicative of a desire within the protest movement to overthrow the government. The protests will almost certainly continue in the coming days, characterised by violent clashes and the deployment of tear gas and rubber bullets by security forces.

Security, Armed Conflict and Terror:

US federal government to deploy 100 troops to Illinois.

The move, which will be implemented by the Department of War, was justified by the administration to the government of Illinois as necessary to protect Immigration and Customs Enforcement (ICE) officers during their operations. In the days before Washington, D.C. announced the decision, multiple cases of violence involving ICE agents were recorded. These included, on 27 September, clashes between ICE officers and protesters at an immigration detention centre in Broadway, Illinois, and on 24 September, a lone wolf attack at an ICE facility, which killed two detainees. Attacks on ICE have likely been driven by the increased visibility of the agency amidst the current administration's attempt to carry out mass



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deportations, including by focusing on large urban areas. There remains a realistic possibility of further violence targeting ICE agents or facilities, which may pose, as in the case of the 24 September attack, a severe threat to civilian bystanders.

Four killed in lone wolf attack targeting Michigan Mormon place of worship.

On 27 September, an individual carried out a mass shooting and arson attack at a Mormon place of worship in Grand Blanc, Michigan, killing four and injuring eight. The gunman was killed by responding police. Local media have reported that the perpetrator espoused extremist beliefs against Mormons, including conspiratorial narratives alleging Mormon plans to “take over the world”. As of 2 October, it is still unclear if the perpetrator was at least in part self-radicalised online.

UN Security Council (UNSC) approves restructuring Haiti mission into “gang suppression force”.

On 30 September, UNSC members passed a resolution to grant the Multinational Security Support (MSS) force, which is mostly comprised of Kenyan police personnel, a mandate to “neutralise, isolate, and deter” the gangs that control much of Haiti, including approximately 90 per cent of the capital Port-au-Prince. The resolution will also lead to an increase in the MSS from around 1,000 personnel to over 5,550 police and soldiers from an expanded set of nations. However, the resolution lacks clarity on important issues such as rules of engagement. As such, it is likely that it constitutes a “statement of intent” rather than a clear framework for the mission’s operations, and will therefore likely be followed by more concrete measures. Its most notable feature is its de facto recognition that the framework implemented so far has failed to effectively deter the gangs. The Haitian transnational government, whose forces are often outgunned by the country’s powerful gangs, has explored other options to combat organised criminal groups, including deploying private military contractors and is planning on holding fair elections in November, a task that is unlikely to materialise given the current security environment.

Environment, Health and Miscellaneous:

Wildfires increase in Argentina and Brazil in mid-September.

Global weather monitoring institutes have reported an uptick in the spread and number of wildfires affecting Brazil and Argentina in mid-September. In the Brazilian Amazon, several hundred separate wildfires are ongoing and only partly contained in mid-September in the Pantanal and Cerrado regions. Argentina, meanwhile, has had severe wildfires in the Cordoba region and in Patagonia. The wildfire season in Brazil and Argentina occurs between July and October, and peaks in September due to typically drier conditions. In 2025, some reports indicate that, in Brazil, wildfires burned more than 30 million hectares of land.



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Europe, Middle East & Africa (EMEA)

Spain, France, and Italy: Large-scale protests highly likely after raid on Gaza flotilla.

On the night of 1-2 October, Israeli forces raided the vessels of the “Global Sumud Flotilla”, arresting activists and crew members. The flotilla is the largest yet to attempt to reach the Gaza Strip from southern Europe, and comprises more than 40 vessels. Several EU parliamentarians and political figures from European and Middle Eastern countries were on board the vessels. While several sources report that the flotilla has been stopped, at least two vessels are unaccounted for as of the time of writing on 2 October, with one ship reportedly entering Gaza territorial waters in the morning of 2 October.

Multiple protests have been scheduled to occur on 2-5 October. Several Italian labour and student unions have announced that they will hold a second day of general strikes on 3-4 October in support of Palestine. This follows a first wave of protests on 22 September, which recorded tens of thousands of attendees and resulted in clashes in Milan. However, disturbances in Italy already started in the early hours of 2 October. Following the first news of the interception, local media reported some cases of direct action, including blockades of public transport hubs in major Italian cities, as well as an attempted blockade of the port of Genoa. Protests and cases of direct action were also reported across Spain and France. In Lyon, at least two people were arrested after trying to block the local ring road.

Solace Global Assessment: It is highly likely that unrest will continue throughout the 2-5 October period across France, Italy, and Spain, with cities like Barcelona, Paris, Milan, Genoa, and Marseille likely to be particularly affected. As the Sumud Flotilla website included a livestream of the vessels and a live tracker of their status and position, it is almost certain that the disorders recorded in the early hours of 2 October were coordinated by small direct action groups to coincide with the projected interception time.

These actions are likely to continue and expand throughout 2 and 3 October, reaching their peak during the weekend. Of the three countries, Italy is likely to be the most impacted. This is because of the Italian government's continued opposition to recognising Palestine, which remains a key driver of unrest, and the involvement of several Italian MPs on the flotilla. Moreover, some Italian media outlets have noted a major spike in online calls for violence and sabotage ahead of the scheduled 3-4 October strike.



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In 2010, a Gaza-bound flotilla was intercepted by the IDF and the vessels were boarded. On one vessel, the MAVI MARMARA, which was boarded in international waters, ten Turkish activists were killed after attempting to deny the boarding. The live streaming of the flotilla has likely been done to deter Israel's use of force and to deny any attempt to control the narrative in response to any incident. However, if any violence is live-streamed, especially if it results in serious injury or death, it will likely trigger immediate international condemnation, diplomatic fallout and will likely intensify any ongoing or future unrest.

Ukraine: US approves intelligence for long-range strikes and considers sending Tomahawks.

On 2 October, reports were published that the Trump administration had approved the provision of intelligence to Ukraine for strikes against long-range energy infrastructure targets in Russia. US officials have reportedly also asked NATO allies to provide similar support. Moreover, Washington is considering the delivery of Tomahawk and Barracuda cruise missiles to Ukraine, although no decision on this has yet been made. Reports had earlier emerged on 26 September that Ukrainian President Volodymyr Zelensky had directly requested Tomahawks from Trump during their recent meetings at the UN General Assembly, with Zelensky stating that Trump had told him "we will work on it".

Solace Global Assessment: Ukrainian forces likely do not require US intelligence to successfully target most Russian energy infrastructure, as these are static targets that can easily be located via open-source intelligence. The Ukrainian aerial campaign against the Russian oil and gas industry, conducted so far using long-range attack drones, significantly intensified in August and has almost certainly had a strategic-level impact. 21 of Russia's 38 large oil refineries have been hit since the start of 2025, and at least 10 refineries have either fully or partly suspended operations since August. This has led to increasing fuel shortages across Russia, although regions such as Moscow and Krasnodar have reportedly not yet been heavily impacted.

While US intelligence is likely not required for Ukraine to successfully continue its campaign on fixed hydrocarbon infrastructure, it almost certainly has some advantages. It will likely serve as a strategic message to Moscow that Washington is endorsing Kyiv's campaign despite the effect on international markets and may be an early indication that the US is about to provide Ukraine with more advanced long-range weaponry. Additionally, the US likely does not allow Ukraine to strike Russian targets within internationally recognised Russia with US-derived weapons without US approval. This would likely involve the US being involved in the targeting cycle to limit collateral damage and potential escalation. US intelligence within the targeting cycle could enable Ukraine to use more sophisticated US-derived systems against these targets that are more accurate and more likely to penetrate Russian air defence. US intelligence could also enable Ukraine to refine its targeting, allowing it to strike more critical elements of oil and gas infrastructure to maximise disruption. US intelligence could also enable Ukraine to improve its striking of dynamic targets related to the oil and gas



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industry, targets that Ukraine lacks the strategic intelligence assets to effectively target. These could include tanker convoys, rail operations or even ship-to-ship transfers. Should these mechanisms be used effectively, the economic disruption is likely to exert increased pressure on Russia to engage in negotiations.

It is not yet fully clear whether the Pentagon has already adjusted its limitations on the use of ATACMS, Storm Shadow and HIMARS weapon systems against internationally recognised Russian territory. However, on 28 September, a Russian thermal power plant in Belgorod was struck by Ukrainian forces, with open-source intelligence assessments of the attack's footage suggesting that the strike was conducted with HIMARS. If this is accurate, such an attack would have required Washington's approval, indicating that the Pentagon's conditions have already shifted.

The provision of Tomahawks and Barracudas would considerably expand Ukraine's capabilities to strike high-value targets (HVTs) in Russian territory, and their use would likely only be authorised on the condition of US intelligence involvement. The Tomahawk cruise missile has a range of 2,500km, allowing Ukraine to strike HVTs deep in Russian territory with much larger explosive payloads than it is able to with its current long-range attack drone arsenal. However, Ukraine currently lacks any launch platforms capable of firing Tomahawks, such as guided-missile destroyers or strategic bombers. The only currently known ground-launch platform for Tomahawks in the open source is the Typhon Mid-Range Capability (MRC) missile system. A US provision of Tomahawks would likely also require Typhon, unless Ukraine is able to develop improvised launch platforms as it has done for much smaller missiles such as Brimstone.

It is not yet clear which variants of the Barracuda could be sent to Ukraine, with the Barracuda family including both autonomous aerial vehicles (AAVs, or loitering munitions) and medium-range cruise missiles. The systems are very new and are not yet combat tested, being unveiled by Anduril Industries in 2024. A key advertised advantage of Barracudas are their much shorter production times (with 95 per cent fewer tools and 50 per cent fewer parts required) and lower cost than other systems which provide the same capabilities. This system is likely appealing to Ukraine as a prospective weapon, given its capacity to meet the vast munitions demands of the Russo-Ukrainian War. Additionally, the US would almost certainly regard its deployment as a valuable opportunity to gather operational data under real combat conditions.

A further expansion of Ukraine's threat against Russian HVTs with long-range precision fires with US and allied support will likely trigger a further escalation in Moscow's ongoing campaign of hybrid threat against NATO members. Moreover, the Kremlin will likely continue to escalate its own aerial campaign against Ukraine, with the third largest combined strikes against Ukraine being conducted overnight 27-28 September. There is a realistic possibility that Russia will adapt its own targeting threshold, which could involve the direct targeting of sites associated with the US and European allies in Ukraine.



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Lebanon: Hezbollah leader refuses to disarm.

On 28 September, the current secretary-general of Hezbollah, Naim Qassem, stated that the Shia militant group will not commit to disarmament, while addressing a crowd commemorating the one-year anniversary of former leader Hassan Nasrallah's assassination in an Israeli strike in southern Beirut. Qassem was addressing thousands of Hezbollah supporters who had gathered at the tomb of Nasrallah, which also included Iran's Supreme National Security Council secretary, Ali Larijani. Qassem stated that Hezbollah will never abandon its weapons, will continue to confront any project that serves Israel and that the handing over of arms is merely the dream of Hezbollah's enemies, both internal and external.

Solace Global Assessment: Hezbollah remains severely degraded after its 2023-24 war with Israel, which resulted in the deaths of two leaders, major attrition within its command, heavy losses of fighters, and the destruction of much of its weapon systems. Following the collapse of the Assad regime in Syria, Hezbollah also lost access to its ground lines of communication from Iran to Lebanon via Syria, and Hezbollah's primary sponsor, Iran, is almost certainly prioritising its own rearmament following the 12-day Iran-Israel war.

These combined pressures have resulted in Hezbollah likely no longer posing a credible threat to Israel, and a rapid rearmament is highly unlikely. These pressures have also likely forced the group to scale back its previous ambitions and adapt its strategy. This will likely involve a shift from conventional military capabilities, such as large rockets and missiles, to focus on developing a greater asymmetric threat, characterised by the creation of smaller, more agile units, and the use of smaller weapon systems such as tactical uncrewed aerial vehicles (UAVs), improvised explosive devices (IEDs) and more mobile systems. There are early indications that Hezbollah is leveraging smuggling networks and increased local arms production to achieve these goals.

Hezbollah's refusal to disarm follows the August 2025 approval by the Lebanese cabinet of a US-backed phased plan to disarm the group by the end of 2025. The plan will involve the Lebanese Armed Forces (LAF) gradually taking control of Hezbollah's weapons, beginning in southern Lebanon, and expanding northward in multiple phases as part of a broader national security strategy. This strategy may be successful in divesting Hezbollah of its heavy weaponry, such as long-range rockets, guided missiles and armoured vehicles. However, it will likely be limited in disarming Hezbollah of its small arms, UAVs, IEDs, and other smaller systems which are easy to conceal, disperse or smuggle. The proposed strategy will be further constrained by Hezbollah's ability to entrench itself within Shia communities that are generally resistant to state intervention.

While Hezbollah's direct threat to Israel has been severely degraded, Israel maintains an enhanced force posture along the Lebanese border, and the Israel Defence Forces (IDF) still occupy five strategic locations in southern Lebanon. There



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is a realistic possibility that any sign of Hezbollah rearmament, in any form, will be exploited by Israel to conduct further pre-emptive operations against Hezbollah, particularly if a resolution is achieved in Gaza that enables Israel to reallocate military resources. Hezbollah's refusal to fully disarm is likely to also increase the risk of internal conflict in Lebanon. Increasing external pressure, combined with domestic disarmament efforts, and political dynamics shaped by fragile sectarian relations and weak institutions, are likely to exacerbate existing tensions, increasing the risk of internal instability, unrest and violence.

Israel and Gaza: New “20-point” ceasefire plan proposed by the US.

On 29 September, US President Donald Trump announced that Israeli officials had agreed to a plan to end the almost two-year long conflict in the Gaza Strip. The plan, which has yet to be ratified by Hamas, calls for the demilitarisation of the Gaza Strip, the disarmament of Hamas, the immediate release of all the hostages in exchange for more than 1,000 Palestinians detained in Israel, amnesty for Hamas members that pledge to adhere by the peace process, a surge in aid entering the enclave, an Israeli pledge not to annex Gaza and not to strike Qatar again, and the establishment of a replacement administration to succeed Hamas. After the cessation of hostilities, Gaza would be governed by an international body, the Gaza International Transitional Authority (GITA), for a maximum of five years, and its security would be overseen by a coalition of regional powers. GITA would eventually set the stage for the West Bank-based Palestinian Authority (PA) to assume unified control over the entirety of the strip. Palestinians would not be forced to leave the Gaza Strip following the ceasefire.

Israeli Prime Minister Benjamin Netanyahu has expressed support for the plan. However, representatives of the far-right parties that support Netanyahu's fragile coalition have expressed reservations, having instead increasingly promoted a complete Israeli annexation of the Gaza Strip and the expulsion of the resident population. Hamas representatives in Qatar have stated that they will “study” the proposal for several days before giving a response to it. However, initial reporting indicates that the Hamas leadership in Gaza, headed by Izz al-Din al-Haddad, is likely to reject the plan.

Solace Global Assessment: The ceasefire plan would fully achieve the first stated Israeli objective for the war in Gaza, the release of the hostages. While not destroying Hamas, it would remove it from power and force its disarmament, which de facto would achieve the second stated Israeli war goal. However, the far-right parties that support the government of Prime Minister Netanyahu are likely to remain partly opposed to the plan due to their maximalist aims to annex Gaza, build settlements in the enclave, and expel the Palestinian population. Netanyahu likely assesses that domestic opposition to prolonging the war, which would endanger the 20 surviving hostages, would pressure the far-right coalition partners into agreeing to the ceasefire plan, rather than potentially risking a political crisis that could result in new elections.



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Hamas has been significantly degraded during the two-year conflict, and recent reporting seems to indicate a lack of strategic clarity in the group, marked by disagreements between the leadership in Gaza and that in Qatar. Despite their severe losses, Hamas leaders in Gaza almost certainly retain the most leverage within Hamas due to their control over the Israeli hostages. Moreover, Hamas' senior leadership abroad has also been decimated and has almost certainly suffered from the de facto collapse of the Iran-led Axis of Resistance in 2025. Consequently, Hamas' near-term decision-making is likely to be primarily influenced by the Gaza-based leadership. For the Gaza-based leadership, several parts of the plan likely remain unacceptable. These include the group's disarmament, which would result in its inability to exercise control over the civilian population, its subordination to the PA, and the foreign-led GITA framework. Overall, these factors make a Hamas rejection of the plan likely.

Gulf of Aden: Houthis strike Dutch-flagged merchant vessel in Gulf of Aden.

On 29 September, the Dutch-flagged general cargo ship, the MV MINERVAGRACHT (IMO: 9571521), was hit by a suspected anti-ship missile when transiting east in the Gulf of Aden (GOA). Two crew members were injured in the attack, and 19 others were evacuated by helicopter to Djibouti after a fire disabled the vessel. Following the decision to abandon ship, the vessel is now adrift in the Gulf of Aden. The MV MINERVAGRACHT previously reported an explosion approximately 2 nautical miles from the vessel on 23 September when transiting west through the GOA. Several assessments at the time of the initial incident suggested that the MV MINERVAGRACHT was not the intended target due to its minimal surface attribution to Israel. However, the Houthis (officially Ansar Allah) have claimed responsibility for the attack and have stated that the vessel was targeted by an anti-ship cruise missile (ASCM) after its owner violated "the entry ban to the ports of occupied Palestine".

Solace Global Assessment: The secondary attack and Houthi statements indicate that the MV MINERVAGRACHT was almost certainly the intended target. Moreover, the vessel had decided to abandon its planned Red Sea transit and rerouted east through the GOA with its automatic identification system (AIS) secured after conducting a port call in Djibouti. The successful striking of the MV MINERVAGRACHT with a stand-off weapon system like an ASCM, while the vessel had suspended broadcasting on AIS and potentially implemented emission control (EMCON) measures, likely suggests that the Houthis were capable of tracking the hull independent of AIS and that going AIS-dark or reducing electronic signatures does not confer protection once a vessel of interest (VOI) has been identified.

The GOA is a congested sea lane with variable weather and sea states, and a complex radio frequency environment, conditions that complicate target acquisition and increase the risk of misidentification or unintended targeting. A vessel transiting the area, even at lower cruising speeds of 10 knots, would quickly leave stale coordinates behind, putting itself outside of an ASCM's search or seeker basket- a relatively small area where the missile's onboard seeker expects to find



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and lock onto an intended target. The dynamic targeting of an AIS-dark vessel likely suggests that the Houthis have access to near-continuous tracking and targeting data within their intelligence, reconnaissance and surveillance (ISR) network in the GOA, which would allow them to make continuous mid-course adjustments. Failure to do this would significantly increase the risk of incidentally targeting vessels linked to states like Saudi Arabia, an outcome the Houthis are likely keen to avoid to limit the risk of escalation.

Given the distance from shoreline areas controlled by the Houthis, this has likely been achieved through the use of deployed assets like long-endurance uncrewed aerial vehicles (UAVs), spotters on deployed civilian profile vessels or more sophisticated external ISR support such as signals intelligence (SIGINT), which could be provided by external partners like Iran's Islamic Revolutionary Guards Corps (IRGC). The strike on the MV MINERVAGRACHT is likely the first successful Houthi attack in the GOA since July 2024 and likely illustrates that the cessation in attacks is unlikely to be reflective of an absence of the Houthis' anti-shipping capability in the GOA.

Early indications are that the MV MINERVAGRACHT and its operator, the Amsterdam-based Spliethoff Group, have no verified recent links to Israel. The vessel had not conducted any recent port calls to Israel or carried any declared Israeli-linked cargos. Furthermore, the vessel's owner has no direct links to Israel; however, the Joint Maritime Information Center (JMIC) has stated that this assessment is currently under review. There is a realistic possibility that a more comprehensive intelligence assessment could identify indirect or tenuous links to Israel, such as historic port calls, beneficial ownership structures or insurance ties, which have been leveraged by the Houthis to justify the attack and may be used to rationalise future strikes on vessels with limited links to Israel.

Morocco: Youth-led protests escalate into clashes in the country's largest protests in years.

Youth-led demonstrations have been ongoing since 27 September across several cities in Morocco, with demonstrators demanding better education, employment opportunities, and healthcare in response to a perceived failure of government funding. Protesters have chanted slogans including "we want hospitals, not stadiums" and "the people want an end to corruption". The protests have been organised by an anonymous online youth group, calling itself "Gen Z 212", which has mobilised supporters through social media platforms such as Discord, TikTok, and Instagram.

Demonstrations were initially relatively peaceful, occurring across Rabat, Marrakesh, and Casablanca. On 30 September, they escalated into clashes in Tiznit, Inzegane, Ait Amira, Oujda, and Temara. In Ait Amira and Inzegane, demonstrators set several police vehicles alight and burned down a bank while protesters threw stones at security forces in Tiznit and Oujda. Security forces responded forcefully, arresting nearly 200 people and deploying water cannon in several cities.



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Notably, in Oujda, a protester was hit by a police minivan, with footage of the incident being widely shared across social media.

Protests continued on 1 October in several locations, including Agadir, Rabat, Tetouan, Tangier, Casablanca, and Marrakesh. At least two people were killed in Lqliâa, near Agadir, after security forces allegedly fired on protesters when they attempted to raid the Royal Gendarmerie Center. According to local reporting, protesters aimed to seize weapons, ammunition, and equipment belonging to the gendarmerie.

The government responded with a statement stating it “listens to and understands the social demands” of the protesters and was “ready to respond positively and responsibly” to find a solution.

Solace Global Assessment: The protests, Morocco’s largest in years, come amid widespread youth frustrations with unemployment, education, and healthcare. According to the national statistics agency, Morocco has an unemployment rate of 12.8 per cent, with youth unemployment standing at 35.8 per cent, and 19 per cent among graduates. The protests have targeted the government, which is perceived as neglecting public services while investing billions of dollars into football infrastructure ahead of hosting the 2025 Africa Cup of Nations and co-hosting the 2030 FIFA World Cup. The catalyst for the public anger was the deaths of eight pregnant women in the maternity ward of a public hospital in Agadir following caesarean operations in September, which had initially sparked smaller-scale protests. According to the World Health Organisation, Morocco has fewer than eight doctors per 10,000 people, far below the recommended 25.

The government's appeal for dialogue is unlikely to appease protesters in the short term. The civil unrest likely constitutes a culmination of public anger after years of neglect in public services, a state of affairs unlikely to be quickly remedied. The government statement defended security forces’ crackdown, praising the “balanced reaction of security authorities in line with relevant legal procedures”. This will highly likely confirm protesters’ claims of government corruption, particularly since the van ramming was widely shared across social media. The further deaths of protesters on 1 October will almost certainly add to protester anger, likely sustaining the civil unrest.

The Gen Z 212 movement, which emerged two weeks ago, has rapidly gained traction across social media. The “212” almost certainly refers to Morocco’s country code, suggesting that organisers view themselves as part of a broader youth-driven movement. The demonstrations share key traits with other Gen Z-led protests in the region: mobilisation through online platforms, an explicitly leaderless structure, and a lack of formal ties to political parties.

These protests are highly likely inspired by similar youth movements, including the recent Nepalese unrest that forced a government resignation, as well as ongoing mobilisation across Africa, notably in Kenya and, most recently, Madagascar.



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It is highly likely that the global surge in youth protests will lead to further civil unrest across other African countries, where economic frustrations, such as unemployment and a rising cost of living, are similarly felt among the population, particularly Gen Z.

Madagascar: President Rajoelina dissolves parliament amid violent anti-government protests.

On 25 September, demonstrations broke out in Antananarivo over persistent water and electricity cuts. The protests drew mostly young demonstrators, and no senior political figures were reported among the crowds. Looting has been reported, and homes belonging to politicians have been attacked. While some foreign businesses, such as a Chinese-owned shopping mall, have been targeted by looters, this is almost certainly opportunistic. Protesters have not yet been reported to explicitly target foreign travellers or expatriates.

Protests continued over the weekend. The demonstrations are the largest wave of unrest in Madagascar in recent years and have led to a reported death toll of at least 22 people, with over 100 injured, according to UN officials. The Madagascar government has dismissed these reports. A curfew has been in place since 25 September and currently operates from 20:00 to 04:00 local time.

In response to the unrest, President Andry Rajoelina, fired the energy minister on 26 September and dissolved the parliament on 29 September, promising a new prime minister in three days. Protest organisers have announced that they are “very disappointed with the President’s speech” and have called for further demonstrations. Opposition leader Rivo Rakatovao announced that his party would not join any government under the leadership of President Andry Rajoelina.

Civil unrest continued on 30 September, with demonstrators gathering at the University of Mahajanga before marching towards the city centre. Local media reported that police used tear gas and stun grenades to disperse crowds in the Ambohitovato Park area of central Antananarivo. Protesters gathered at the same location on 1 October, but security forces successfully dispersed them. Demonstrations also occurred in Toliara, approximately 925 kilometres south of Antananarivo. Moreover, further widespread power outages were reported in Antananarivo and surrounding suburbs on 30 September.

While the airport remains open, there have been numerous flight cancellations, and routes to the airport have been intermittently blocked. The US Department of State has advised its citizens to shelter in place and has changed its travel advisory to “Level 3: Reconsider Travel”; the UK FCDO has advised “against all but essential travel”.

Solace Global Assessment: Madagascar is one of the world’s poorest countries. According to a 2022 report from the World Bank, 75.2 per cent of the population lives below the poverty line. Poverty rates have remained high over the past



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decade, with rural poverty decreasing marginally while urban poverty has almost doubled. Many households suffer from overlapping deprivations in health, education, sanitation, and infrastructure. The poor economic situation is exacerbated by Madagascar's high vulnerability to environmental risks, including cyclones and droughts. Damage from four tropical storms in 2022 was estimated to have cost as much as 5 per cent of Madagascar's GDP.

The protests have been in line with other Gen Z-led protest movements in Africa. The movement gained momentum on social media, which was used to mobilise protests, coordinate meeting points, and share live updates. The lack of political figures among the protesters highlights the grassroots nature of the movement. The use of Straw Hat Jolly Roger, which was widely used in the recent Nepalese protests which deposed the government, suggests a broader Gen Z-focused sentiment and the potential desire of a far more radical intent to likewise overthrow the government.

The government's reaction to demonstrations, particularly security forces' use of force, is highly likely to be perceived as excessive. If footage spreads across social media of security forces using live ammunition against protesters, this could significantly inflame demonstrations. Furthermore, the continuation of widespread power outages, which were the initial trigger for the unrest, will likely further galvanise the unrest. The rhetoric of protest organisers indicates broader anti-government sentiment, which could escalate unrest motivated by more radical objectives. The opposition party's criticism of Rajoelina almost certainly increases pressure on him to resign, and will likely increasingly become the primary demand of protesters. This will likely lead to a continuation of the protests unless the president stands down.

EMEA Summary and Forecast

Politics, Economics and Civil Unrest:

Pro-Europe PAS party wins Moldovan parliamentary elections.

The Moldova parliamentary elections, held on 28 September, saw the Party of Action and Solidarity (PAS) of President Maia Sandu, win 50.2 per cent of the vote and thus 55 of the 101 seats in parliament. The pro-Russia Patriotic Electoral Bloc (BEP) came second with approximately 24.2 per cent of the vote. The results are an important victory for Sandu and the pro-EU camp, and will likely accelerate Moldova's bid to enter the union. On the other hand, the vote is a defeat for Moscow, which almost certainly was responsible for several attempts at destabilising Moldova during the electoral campaign. While Igor Dodon, the leader of BEP, refused to accept the result and called for protests, only small demonstrations have been held in Chisinau as of 2 October. It is highly likely that Moscow, which also claimed that Moldova doctored the result and prevented pro-Russian demographics (such as residents of Transnistria and the



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Moldovan diaspora in Russia) from voting, will continue carrying out hybrid warfare operations targeting Moldova in the medium term.

Algerian youth call for peaceful demonstrations on 3 October.

The Algerian youth group Gen Z 213 has called for peaceful marches on 3 October following afternoon prayer to denounce the “worsening corruption, economic stagnation, and political monopoly by the ruling elite”. The calls for protests come amid a rising cost of living and widespread youth unemployment, common catalysts for civil unrest across Africa in 2024 and 2025. Algerian security forces typically forcefully crack down on demonstrations, and they will likely do so with the upcoming demonstrations. If this occurs, this will likely inflame civil unrest and could lead to large-scale clashes, as seen in Madagascar and Morocco. The “213” almost certainly reflects Algeria’s country code, inspired by the ongoing Moroccan Gen Z 212 movement. It is highly likely that this is becoming a rallying symbol for youth protesters in Africa, with further similarly named groups likely to emerge in the coming weeks.

Former Congolese President Joseph Kabila sentenced to death in absentia for war crimes.

On 30 September, a military court sentenced former DRC President Joseph Kabila to death in absentia for treason, crimes against humanity, and war crimes, including murder, sexual assault, torture, and insurrection. The charges were levelled against Kabila amid accusations over his support for AFC/M23, who are currently waging an insurgency in North and South Kivu in the country’s east. The court has also ordered Kabila to pay a fine of USD 33 billion. Kabila has denounced the charges as “arbitrary” and an “instrument of oppression”. M23 leader Bertrand Bisimwa has called the sentence a “violation of the Declaration of Principles”, a preliminary peace agreement signed on 19 July 2025. The charges come after Kabila returned to the DRC in May 2025, prompting the government to revoke Kabila’s parliamentary immunity and suspend his party, People’s Party for Reconstruction and Democracy (PPRD), amid rumours that he may mount a challenge to President Félix Tshisekedi. Kabila’s whereabouts are not currently known, and it is highly likely that the charges are meant to dissuade him from attempting any kind of challenge to Tshisekedi.

Fuel prices increase by 33.16 per cent in Malawi.

On 2 October, Malawi Energy Regulatory Authority (MERA) announced an increase in petrol and diesel pump prices by an average of 33.16 per cent. The move is reportedly meant to ensure “sustained fuel supply and attain cost reflective pricing”. The price review comes shortly before President-elect Peter Mutharika is set to be sworn in, on 4 October. While widespread protests did not break out during the election, both sides claimed victory, and the MCP declared that it found evidence of irregularities in the vote count of 13 of Malawi’s 28 districts. There is a realistic possibility that the increase in fuel prices, which will almost certainly add significant strain to an economy marred by high living costs, will ignite public anger and prompt demonstrations around the swearing-in ceremony.



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Security, Armed Conflict and Terror:

Likely lone wolf attack at synagogue in Manchester, UK, kills two people.

On the morning of 2 October, an individual reportedly carried out a car ramming and stabbing attack at a synagogue in the Crumpsal area of Manchester. Two people have been killed and two more injured, and the attacker was shot and reportedly killed by responding police. While authorities have not yet confirmed the identity of the attacker, it is highly likely that the stabbing was a lone wolf attack. The incident coincides with the Jewish holiday of Yom Kippur, and occurred only hours after a major development regarding the Israel-Gaza war, namely the detention of the passengers of the Global Sumud Flotilla. Past lone wolf attacks carried out by self-radicalised individuals targeting Jewish people and places of worship have coincided with notable dates. These included the September 2024 shooting in Munich, which happened on the anniversary of the 1972 Summer Olympic massacre.

11 Serbian nationals arrested for reportedly placing pig heads outside French and German mosques.

On 28 September, Serbian authorities stated that they had arrested 11 individuals in connection with the incidents, which occurred in September, as well as a separate case of vandalism targeting a Holocaust museum in April. Authorities also stated that the detainees had received “training” by another suspect “acting under the instructions of a foreign intelligence service”, although this individual has not been apprehended and is reportedly “on the run”. It is likely that the incidents had been deliberately orchestrated to stoke sectarian tensions in Europe. In France, they occurred on the eve of the fall of the government of Prime Minister Bayrou, and therefore at a time of increased political tension. French officials have previously stated that they are investigating Russia’s role in similar incidents aimed at destabilising France. In a separate arrest in Moldova, 74 individuals were identified as having received “training” in Serbia to start violent protests during the 28 September elections. If confirmed, Russian involvement in both cases would likely suggest Serbia is being used as a staging and training hub for low-cost operatives deployed in hybrid operations aimed at destabilising European states.

Salafi group claims rare attacks on Israeli forces in Gaza Strip.

On 29 September, channels of Liwa al-Tawhid claimed three attacks on Israel Defence Forces (IDF) troops at an unspecified location in the Gaza Strip. Liwa al-Tawhid is a small Salafi-jihadist militant group (with a much larger and better-established Syrian chapter) that, in mid-2024, was publicly denounced by Hamas as an “apostate” group that did not follow “Sunni Islam”. Throughout the war, the group has remained mostly quiet, although they are reported to have at one point held at least one hostage. The group’s claim of a series of attacks is a rare occurrence and is likely dictated by the group’s interest in accruing more popular support in the Gaza Strip as Hamas’s influence declines. Liwa al-Tawhid and other groups that are not aligned with the main militias in the Gaza Strip will likely oppose a possible ceasefire deal



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allowing for the re-entry of the Palestinian Authority (PA) in Gaza, and could have an important disruptive impact on the implementation of any future ceasefire plan.

Senior IDF official briefs press that Israel “may need to act again against Iran” as tensions rise.

On 29 September, a senior Israel Defense Forces (IDF) official briefed the Israeli news outlet Maariv that Israel is preparing for multiple scenarios and options, with one being that Israel “may need to act again against Iran.” The comments come amid increasing tensions with Iran, with a senior Islamic Revolutionary Guard Corps (IRGC) announcing on 1 October that Iran intends to expand its self-imposed missile range of 2,000km. Moreover, on 27 September, an Iranian deputy minister claimed that the Supreme National Security Council (SCNC) directed officials to designate successors in case of leadership disruption. The SNSC subsequently rejected the minister's comments, however.

The tensions coincide with the movement of seven US aerial refuelling tankers and a UK Rivet Joint aerial signals intelligence (SIGINT) platform to Al Udeid Air Base in Qatar, with the latter being a strategic-level intelligence, surveillance and reconnaissance (ISR) asset. However, these deployments may just be a routine deployment, or in reaction to the currently increased threat of the Yemen-based Houthis against merchant shipping.

JNIM fuel blockade drives shortages in Bamako, Mali.

The al-Qaeda-affiliated Jama'at Nusrat ul-Islam wa al-Muslimin (JNIM) has been carrying out a campaign of systematic attacks and raids on fuel shipments in Mali since early September. As of the end of the month, local media have reported increasing fuel shortages in the capital, Bamako. No notable cases of disorder have emerged as of 2 October. However, protracted shortages are likely to significantly increase the threat of civil unrest. In turn, growing instability in Bamako has the potential to severely destabilise the junta, which only maintains limited control over much of Mali's territory. JNIM's fuel blockade is highly likely meant to maximise pressure on the junta, possibly forcing it to relocate resources and personnel towards the capital, which in turn would likely afford the militant group more freedom of operation in Mali's peripheral areas.

Airstrike near market in Western Niger kills at least 30.

On 26 September, at least 30 people were killed in an airstrike in western Niger near a weekly market in Injar in the Tillabery region, near the border with Burkina Faso and Mali. Dozens of civilians were reportedly killed in the strike, which was highly likely intended to target Islamic State Sahel Province (ISSP), the most active insurgent group in Niger. Injar is reportedly a hub of insurgent activity, with militant groups allegedly attaining supplies from the market. The strikes come shortly after Niger, along with fellow Alliance of Sahel States (AES) members Mali and Burkina Faso, announced its withdrawal from the International Criminal Court (ICC). While the withdrawal becomes effective one year after the notice



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is issued, it is likely that Niger's military, which has struggled to control the ongoing insurgencies, will increase its attacks on civilian areas in an attempt to reduce the jihadist threat.

Puntland forces stage offensive against the Islamic State Somalia Province (ISS).

Puntland forces have engaged in offensive operations against ISS for almost a year, focusing on the Cal Miskaad mountain range. Clashes have recently intensified, likely as Puntland forces advance towards more fortified areas of the mountain range, where retreating ISS elements have entrenched themselves. On 23 September, an ISS-planted improvised explosive device (IED) killed an important field commander, General Qalyare. Between 27 and 29 September, US African Command (AFRICOM) forces carried out a 48-hour-long series of airstrikes on ISS positions. According to Somali officials, approximately 200 ISS fighters are assessed to still survive in the remote Cal Miskaad mountain range, almost certainly by coercing local communities or leveraging supporters for basic resources. If accurate, this figure indicates a significant deterioration of ISS's manpower, which some estimates placed at up to 1,400 fighters before the beginning of Puntland's offensive. ISS, which controls the al-Karrar financial office and is led by Abdulqadir Mumin (identified as the head of the Islamic State's foreign operations), had, by late 2024, established itself as a key node in the flow of funds and fighters between the Middle East and Africa. Puntland's offensive has likely decreased ISS's ability to carry out this function (according to some reports, Mumin has been forced to relocate outside of Somalia because of the offensive), but the group almost certainly retain an interest in re-establishing lost positions and, as the successful attack on Qalyare showcases, remains capable of inflicting significant attrition on Puntland units.

Environment, Health and Miscellaneous:

Heavy rainfall in Odessa Oblast, Ukraine, leads to deadly flash floods.

On 1 October, almost two months' worth of rainfall fell in the Odessa Oblast of Ukraine in just seven hours. This led to severe flash floods, which killed at least 9 people. The city of Odesa was heavily impacted, with flooding in the Peresyp district making roads impassable for traffic, which almost certainly complicated response efforts. Moreover, over 36,000 customers were left without electricity due to power outages. The Mayor of Odesa stated on Telegram that it was impossible for the stormwater drainage system to withstand the highly adverse rainfall. President Volodymyr Zelensky has reportedly instructed his deputy prime minister to conduct a full review of operations in Odesa.

The increasing frequency of extreme adverse weather events across Europe, which climate scientists warn will further worsen with climate change, is a growing challenge for European states such as Ukraine. European states do not typically have the same levels of disaster resiliency and emergency preparedness measures as developed economies that are regularly exposed to natural disasters, such as Taiwan and Australia.



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Asia Pacific (APAC)

Afghanistan: Taliban orders nationwide internet and telecommunication blackout.

On 29 September, the Taliban government ordered a nationwide shutdown of internet and mobile telecommunication networks until further notice, with some sources stating at the time that the Taliban was intending on building or maintaining segmented or internal networks for government or vetted use while restricting broader public access. The nationwide suspension in connectivity follows earlier bans which were implemented in several provinces earlier September. The measures were imposed by the Taliban under a stated campaign to “prevent immorality” by restricting access to content the regime deems immoral. Multiple reports indicate the shutdown was ordered by the Taliban’s supreme leader, Hibatullah Akhundzada, and expanded nationwide following earlier provincial cuts. The suspension of services has limited access to Afghan media outlets based abroad, like the London-based Afghanistan International TV channel. Flights out of Kabul International Airport were disrupted by the blackout, with airline communications, check-in and flight-planning systems degraded, leading to major delays and cancellations. The internet was restored on 1 October following widespread international condemnation.

Solace Global Assessment: The suspension of communication networks and restriction of access to the outside world have become an established tactic of the Taliban government. In 2024, the Taliban was accused of jamming satellite signals in Kabul to limit access to foreign-based satellite TV, and localised phone and internet shutdowns have been a recurring tactic since the Taliban returned to power in 2021. These earlier provincial cuts were potentially indicative of a phased plan that reached maturation on 29 September.

While the recent blackout has been justified to curb the spread of immorality, it was likely imposed to restrict access to potentially seditious information, such as opposition narratives, or to censor any content that could threaten regime stability and to reduce international oversight of Taliban activity. However, the recent nationwide shutdown marks a clear escalation from previous, localised measures, and likely signals a more deliberate strategy to suppress dissent, restrict international oversight and limit access to external information.

The UN mission in Afghanistan (UNAMA) immediately called on the Taliban to restore internet and telecommunication nationwide, citing the potentially severe humanitarian and economic impacts, as well as the disproportionate impact on women and girls. The UN, alongside multiple NGOs, also warned that the blackout will severely impede the planning, coordination, and delivery of humanitarian operations. The immediate effects disrupted efforts to assist remote



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communities affected by the September earthquake, including the ability to contact frontline staff, effects that would have been compounded by the onset of winter conditions.

The Taliban's decision to restore the internet was likely partially influenced by international pressure, with both foreign governments and NGOs condemning the decision. Although the blackout only lasted two days, its effects were significant, and there is a realistic possibility that this could become a recurring tactic of the Taliban. The Taliban may decide to episodically suspend communications during times of heightened rebel activity, civil unrest or in response to any threat that undermines the regime.

Future potential nationwide blackouts are likely to result in or exacerbate a plethora of existing issues across multiple sectors in Afghanistan, where an estimated 23 million people are in need of aid. Economically, the effects of blackouts are almost certain to be severe and will likely lead to a deterioration in the humanitarian situation. Banking, e-commerce, payroll and remittance flows from the Afghan diaspora abroad will likely be significantly affected. Aviation and other forms of transport will likely be harder to plan and coordinate, and services like education and healthcare will almost certainly be affected by the direct and indirect effects of blackouts.

The Taliban likely ordered the blackout in part to address security concerns. The outage likely reduced digital tracking of senior Taliban figures, complicated the identification of foreign terrorists entering Afghanistan, limited foreign intelligence collection and disrupted the ability of rebel forces to plan and coordinate attacks. However, it also degraded situational awareness and impeded crisis communications, and could be exploited in the future by hostile actors to conduct attacks and engage in criminal activity with reduced monitoring, risks that would likely increase if similar suspensions are reimposed.

The Philippines: Magnitude 6.9 earthquake off Cebu Island kills at least 72 people.

On 30 September, a magnitude 6.9 earthquake at a depth of 10 kilometres struck 11 kilometres east-southeast of Calape, Philippines. Shaking was felt across the Visayas Islands in the central Philippines. The epicentre was only 21 kilometres northeast of Bogu City, resulting in moderate-to-heavy shaking in the city. Moreover, the tremor generated light-to-moderate shaking in Cebu City. At least 72 deaths have been confirmed, with 294 injuries.

The most severe devastation and most of the fatalities were concentrated in northern Cebu near the epicentre, particularly in Bogu City, Medellin and San Remigio. For example, in San Remigio, a sports complex collapsed, killing several people playing basketball inside. The hospital in Bogu City was overwhelmed, according to officials, and power



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outages and heavy rainfall complicated disaster response. Local authorities declared a State of Calamity in parts of Cebu, and disaster response operations are ongoing.

Solace Global Assessment: The Philippines is almost certainly among the most vulnerable countries in the world to natural disasters. Firstly, its geographical position exposes it to frequent tropical storms and typhoons, while its location within the Pacific ‘Ring of Fire’ makes it highly prone to seismic activity. In 2023, a 7.6 magnitude earthquake killed at least three people and injured 79, and in 2022, a magnitude 7 earthquake killed at least five people and injured 60. However, the 30 September Cebu earthquake stands out as one of the deadliest earthquakes in the Philippines in years.

Secondly, the Philippines has poor disaster resiliency. A country’s disaster resilience, which consists of multiple factors including preparedness measures, infrastructure quality, building planning, and emergency response capacity, is a critical determinant of a natural disaster’s potential impact. Due to the confluence of the Philippines’ extreme exposure to natural hazards and its poor disaster resilience, the country is frequently cited as the most disaster-prone country in the world.

On 21 September, mass nationwide protests occurred in the Philippines, due to public grievances regarding corruption in disaster resiliency projects, particularly flood defences, with estimates of approximately 60,000 people demonstrating in Metro Manila. Moreover, the Philippines is recovering from the impact of two recent tropical cyclones, Super Typhoon Ragasa (known locally as Nando) and Typhoon Bualoi (known locally as Opong), which each led to extensive flooding and fatalities across the country. It is likely that the devastation of the earthquake and limitations in disaster response will further galvanise the protest movement, likely resulting in further protests in Philippine urban centres in the coming weeks.

APAC Summary and Forecast

Politics, Economics and Civil Unrest:

Anti-government protests in Pakistan-administered Azad Jammu and Kashmir.

Anti-government protests in Pakistan-administered Jammu and Kashmir have escalated since their start on 29 September, with the death toll reaching at least 12 people and hundreds more injured. Security forces have used live ammunition and tear gas against demonstrators. The unrest was sparked by the breakdown of talks between the federal government and the Jammu Kashmir Joint Awami Action Committee over regional demands for rights and reserved



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legislative seats, but has escalated into broader frustrations with excessive force by the military. Amid a communications blackout, the Pakistani Prime Minister's office announced that a delegation had been sent to the region to address the situation. Additionally, the Pakistan Interior Ministry has called a meeting in Islamabad to discuss further steps in response to the protests. Demonstrations are highly likely to continue, with the harsh crackdown by security forces almost certainly reinforcing protesters' views over the military's excessive force.

In Bangladesh, alleged rape results in mob violence and blockade of Khagrachari.

On 28 September, severe clashes were recorded in the Khagrachari districts of the Chittagong Hill Tracts, following the spread of reports of a case of rape in the area. The clashes, which resulted in at least three deaths and hundreds of cases of vandalism of local shops, occurred the day after Jumma Chhatra Janata, a local political group, announced a blockade of the area, which eventually ended on 1 October. According to local media, the clashes followed mostly ethnic lines, between ethnic Chakmas and Marmas, both of which are predominantly Buddhist. Some sources have alleged that the clashes were promoted or spearheaded by the United People's Democratic Front (UDPF), a local political party that is mostly comprised of ethnic Chakmas. The Chittagong Hill Tracts, sometimes referred to as CHT, remain extremely politically unstable, and the fragile peace constructed with the 1997 deal with Dhaka has been almost certainly weakened by the August 2024 ousting of the Hasina government. Incidents such as the recent clashes have the potential to escalate beyond a local dimension and could influence violence in other parts of the country.

Security, Armed Conflict and Terror:

Ten killed in coordinated attack on security forces in Quetta, Pakistan.

On 30 September, ten people were killed and at least 26 were injured by a suicide vehicle-borne improvised explosive device (SVBIED) in the Pishin area of Quetta, in the Pakistani region of Balochistan. The attack was almost certainly aimed at targeting a headquarters of the Frontier Corps in the area. According to local media, the explosion was part of a larger attack, with at least four gunmen being killed by responding security while attempting to enter the HQ building. Pakistani authorities have blamed the attack on "Fitna al-Hindustan" (FAH), an allegedly Delhi-sponsored group. This follows official guidelines dating to May 2025 that designate all armed groups in Balochistan as FAH. However, it is highly likely that the attack was carried out by a Baloch separatist group, like the Balochistan Liberation Army (BLA) or Balochistan Liberation Front (BLF), both of which are highly active in the area. The attack almost certainly demonstrates the continuing ability of Baluch militant groups to strike Pakistani security forces at will in the border regions.

South Korean forces fire warning shots at North Korean vessel after maritime boundary breach.

On 25 September, a North Korean vessel crossed the Northern Limit Line (NLL) near the island of Bengnyeong, resulting in South Korean forces firing warning shots. The incident occurred only days after South Korean President Lee Jae Myung



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pledged, while speaking at the United Nations General Assembly, to reduce “unnecessary military tensions” with Pyongyang. North Korea has rejected South Korean appeals and overtures, including Lee’s order to halt loudspeakers as inauthentic and only providing cover for Washington and Seoul’s attempts to weaken North Korea. The maritime incursion was likely intended to undermine the de-escalation narrative from Seoul and to challenge the legitimacy of the NLL.

Environment, Health and Miscellaneous:

Typhoon Bualoi results in severe flooding in Vietnam, Thailand, and Myanmar.

Typhoon Bualoi has caused significant damage across Southeast Asia, particularly in Vietnam and Thailand. In Vietnam, the typhoon has resulted in widespread flooding and landslides, leading to at least 29 deaths, 119 injuries, and 19 people missing. The provinces of Thanh Hoa, Nghe An, Ha Tinh, and Quang Tri have experienced severe power outages due to damaged electricity poles. In Tuyen Quang province, a body was recovered after a landslide, and search and rescue operations continue in areas affected by the storm. In Thailand, major flooding has been reported in Phitsanulok, with search and rescue teams facing challenges due to the conditions. In Myanmar, patients were evacuated from a hospital in Oktwin due to flooding. The remnants of Bualoi have moved into Laos, weakening to a tropical depression but still causing heavy rains and strong winds.

Tropical Storm Matmo to hit the Philippines over the next 36 hours.

Tropical Storm Matmo, known locally as Paolo, is projected to bring a storm surge to northeastern coastal areas of the Philippines over the next 36 hours, with a potential wave height of up to three metres. At-risk areas include Aurora, Quezon, Cagayan, and Isabela municipalities. Authorities have told residents to be ready to evacuate coastal areas. It is highly likely that the storm will increase the risk of severe landslides and floods in coastal regions, causing severe transport disruptions, and prevent immediate access to impacted areas from emergency response teams. The storm comes only days after the latest anti-corruption protests, which have also been partly driven by government failures to address environmental disasters, and in the immediate aftermath of the 30 September earthquake. Consequently, high-severity impacts have a realistic possibility of resulting in further unrest.



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