

Week commencing 7 September 2026

COVERAGE

24 August — 6 September
2026

AUDIENCE

Executive leadership · Technology, defence and security
decision-makers

HANDLING

Internal use — not for onward
distribution

IF YOU JUST REMEMBER ONE THING FROM THIS BRIEFING...

Berlin formally accused Russia of a NATO-soil attack in the same week Washington's envoys sat down with Putin to end the war.

Germany's 1 September attribution and the EU-NATO pledge to escalate landed days before Steve Witkoff and Jared Kushner met Putin in Moscow, then Zelensky in Kyiv. Deterrence and negotiation are running simultaneously, not sequentially. Ask your crisis team which of your assumptions depend on those two tracks staying aligned.

FORTNIGHT IN REVIEW

Geopolitics, defence and security

PRIORITY

1–2 SEP

Germany blames Russia for Leipzig drone attack; EU and NATO vow coordinated response

Berlin's interior minister formally accused Russian state entities on 1 September of the 4 August explosive drone found near a Ukrainian cargo aircraft at Leipzig/Halle. Chancellor Merz said a response coordinated with allies would follow within days; von der Leyen and Rutte met to discuss further sanctions.

So what: this is the first NATO-territory attack Berlin has formally attributed to Russian intelligence — expect fresh EU sanctions and tighter scrutiny of defence-linked logistics sites.

PRIORITY

5–6 SEP

US envoys shuttle between Moscow and Kyiv; no breakthrough on a Ukraine ceasefire

Witkoff and Kushner met Putin at the Kremlin on 5 September for over three hours, then held what both sides called substantive talks with Zelensky in Kyiv on 6 September. Moscow and Kyiv paused strikes on each other's capitals for the visits; Zelensky said he expects the war to continue.

So what: plan around a prolonged conflict, not imminent settlement — capital-strike pauses are a diplomatic courtesy, not a ceasefire, and can end without notice.

PRIORITY

24 AUG

EU approves €6.1bn for Ukraine's air and missile defence, ammunition and radars

The European Commission approved the package on 24 August, drawn from the €90bn Ukraine Support Loan, for air and missile defence systems, munitions and radar procurement as Russia intensified ballistic and drone strikes on Ukrainian cities.

So what: European and allied air-defence and munitions suppliers face a fresh demand signal — check whether your supply chain has spare capacity for another procurement wave.

WATCH

29–30 AUG

US Commerce drafts rule to close Chinese remote-access route to Nvidia chips

Commerce is drafting a rule to block Chinese firms from renting Nvidia GPU compute through data centres in Thailand, Malaysia and Japan, reported 29–30 August. Export lawyers note Commerce lacks clear statutory authority until the Senate passes the Remote Access Security Act, still pending since January's House vote.

So what: do not assume the loophole closes on the announced timeline — a rule issued without statutory backing invites legal challenge and delay.

WATCH LIST

Developments to track this fortnight

DEVELOPMENT	REGION	SECTOR AFFECTED	WHAT TO WATCH NEXT
Germany's response to Leipzig attack	Europe (Germany)	Security, defence	Whether the coordinated sanctions package is announced this week.
Ukraine peace process	Russia / Ukraine	Defence, security	Whether capital strikes resume once US envoys depart.
EU €6.1bn air defence package	Europe / Ukraine	Defence, supply chain	Which suppliers win contracts under the Support Loan tranche.
Nvidia remote-access rule	US / China / Asia	Technology, supply chain	Whether Commerce publishes before the Senate acts on RASA.
Poland and Romania airspace violations	Europe (NATO east)	Defence, security	Whether further interceptions occur under Eastern Sentry.

This is a watch list, not a task list — track these for consequence, not for remediation, and confirm before acting.

REGULATORY AND SECTOR WATCH

What changed, and what is coming

In force now

- EU's 21st sanctions package: crypto-services board ban extended to any Russian national from 25 August.
- Commerce's case-by-case licence review for Nvidia H200 and AMD MI325X exports to China remains in effect.

Approaching

- Commerce's draft remote-access rule could reach industry as soon as September, ahead of RASA.
- Germany's coordinated EU/NATO sanctions response to the Leipzig attack, promised within days of 1 September.

Standing watch — Baltic, Nordic and NATO eastern-flank incursions. Drone and airspace incidents continue under Eastern Sentry, including a July cruise-missile fragment in Poland and repeated Romanian interceptions. Treat further incidents as expected, not exceptional.

RECOMMENDED

Three things to do before the next edition

- Confirm Ukraine-exposed suppliers can absorb the EU's air-defence procurement wave without diverting allied orders.
- Check China-facing compute arrangements for reliance on Southeast Asian data centres the draft US rule targets.
- Review escalation triggers for accumulating grey-zone incidents, not only a single unambiguous attack.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely that Germany's coordinated sanctions response follows within days, and a realistic possibility that Commerce publishes its remote-access rule before the Senate acts on RASA. A comprehensive ceasefire remains unlikely before the next edition, though further capital-strike pauses during envoy visits are a realistic possibility.

NEXT EDITION

Monday 21 September 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

