

Week commencing 5 October 2026

COVERAGE

21 September — 4 October
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...

A Chinese survey ship was caught spoofing its position while mapping the undersea cable corridor off Taiwan — the pattern NATO caught Russian submarines rehearsing in the Arctic weeks earlier.

The Philippine Coast Guard says JIA HAI KE 7 faked its AIS track while loitering over the Luzon-Taiwan cable route, ignoring radio challenges before being driven off. Seabed-mapping is now a documented tactic on two fronts. Ask providers which Asia-Pacific routes transit the Luzon Strait, and whether redundancy exists outside it.

FORTNIGHT IN REVIEW

Geopolitics, defence and security

PRIORITY

28 SEP–2 OCT

Chinese survey vessel caught spoofing position over Taiwan cable corridor

The Philippine Coast Guard flagged JIA HAI KE 7 conducting an unauthorised seabed survey off Batanes on 28 September, accused it of faking its AIS position near the Taiwan cable route, then drove it out with its largest cutter on 1 October. Manila rejects China's claim to the waters.

So what: undersea cables near contested waters are now a rehearsed reconnaissance target in the Pacific as well as the Baltic — review which Asia-Pacific links transit the Luzon Strait.

PRIORITY

21–27 SEP

NATO scrambles six times as Kaliningrad flights go dark over the Baltic

Lithuania's defence ministry logged six NATO interceptions of Russian aircraft flying to and from Kaliningrad with transponders off, no flight plans and no radio contact, 21–27 September, including Su-30s, MiG-31s and an Il-20. No incursion into allied airspace occurred.

So what: this is a weekly operating pattern, not an anomaly — treat Baltic airspace disruption as a standing assumption, not an escalation trigger on its own.

PRIORITY

22–25 SEP

Zelensky offers energy ceasefire at UNGA, but Russia has not agreed

At the UN General Assembly, President Zelensky said Ukraine was ready for "any kind of format" of a mutual halt on energy-infrastructure strikes, responding to a US push for a truce before winter. Russia has given no public commitment; Kyiv says it does not know Moscow's position.

So what: an offer is not a ceasefire — resilience planning should still assume strikes on grid infrastructure continue through winter.

WATCH

28 SEP–1 OCT

Chip-smuggling scrutiny clouds US-China AI summit ahead of October talks

Reporting tied a blacklisted Chinese server maker's US subsidiary to a network rerouting advanced Nvidia chips around Entity List controls, as Beijing separately weighed letting ByteDance and Alibaba import restricted gaming-tier chips for AI infrastructure — both days before a planned US-China AI summit.

So what: enforcement gaps are widening even as licensing eases — reassess compliance exposure on any China-facing compute supply chain before summit outcomes land.

WATCH LIST

Developments to track this fortnight

DEVELOPMENT	REGION	SECTOR AFFECTED	WHAT TO WATCH NEXT
Spoofing survey vessel off Batanes	South China Sea / Philippines	Technology, security	Whether Manila lodges a formal protest or further vessels are detected nearby.
Kaliningrad transponder-off flights	Baltic / Lithuania	Defence, security	Whether a flight pattern crosses into allied airspace rather than international corridors.
Energy-ceasefire offer unanswered	Russia / Ukraine / US	Defence, security	Whether Russia issues any public response to Kyiv's offer.
AI chip export-control loophole	US / China	Technology, supply chain	Outcome of the planned US-China AI summit this month.
EU sanctions wind-down deadline	EU / Russia	Technology, supply chain	24 October cut-off for pre-existing energy-sector transactions.

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

REGULATORY AND SECTOR WATCH

What changed, and what is coming

In force now

- EU's 21st sanctions package remains in force since 23 July; energy-sector transaction wind-down runs to 24 October.
- US case-by-case licensing for Nvidia H200 and AMD MI325X exports to China stands, with a 25 per cent tariff and 50 per cent volume cap.

Approaching

- US-China AI summit expected this month, with chip-smuggling findings likely to feature.
- EU Council decision due by 9 October on extending sanctions tied to Russia's destabilising activity abroad.

Standing watch — undersea infrastructure. Seabed reconnaissance and suspected sabotage rehearsal now span both the Baltic and the South China Sea with no sign of reduction. Treat further incidents near cable corridors as expected, not exceptional.

RECOMMENDED

Three things to do before the next edition

- Map which Asia-Pacific data or cloud links transit the Luzon Strait cable corridor China's survey vessel tracked.
- Reassess compliance exposure on any China-facing AI compute supply chain given active Entity List enforcement gaps.
- Confirm winter continuity and energy-resilience plans still assume strikes on Ukrainian grid infrastructure continue.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely that further NATO interceptions of transponder-off Kaliningrad flights occur before the next edition, and a realistic possibility that another Chinese survey vessel is detected in a contested Asia-Pacific EEZ. Russia's silence on the energy-ceasefire offer makes a durable truce unlikely before winter.

NEXT EDITION

Monday 19 October 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

