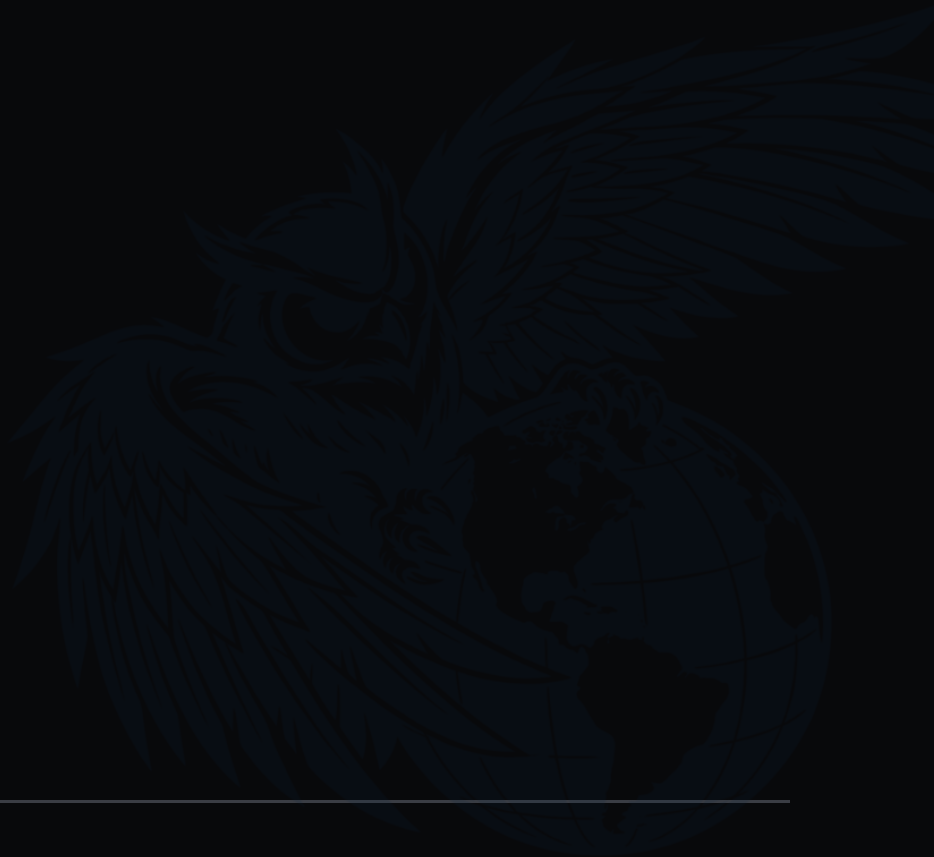

PUBLISHED MARKET RESEARCH

The Lead Agency Rule

UNGA-81 Falls Under State-Local Counter-Drone Authority, and the Rule That Governs It Puts a Federal Agency in Charge

AIG-DEF-26-008 · 11 SEPTEMBER 2026

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UNGA-81 Falls Under State-Local Counter-Drone Authority, and the Rule That Governs It Puts a Federal Agency in Charge

Section 124.10(c) decides the practical value of the new state and local counter-drone authority at UNGA-81: where federal and SLTT operations overlap, the federal agency takes tactical lead and an agency that rejects that coordination may not operate inside the covered perimeter and window.^{1,39} Market access is then constrained by two non-public equipment lists, closed operational reporting until December, and a 180-day spectrum authorisation that lapses about 29 December 2026.^{1-3, 23}

HEADLINE INDICATORS

124.10(c) LEAD-AGENCY PROVISION	0 PUBLIC EQUIPMENT LISTS	About 29 Dec 2026 SPECTRUM AUTHORITY LAPSE	18 Dec 2026 FIRST PUBLIC ACCOUNTING
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DOCUMENT CONTROL

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CENTRAL JUDGMENT

The argument that the SAFER SKIES Act opened a door and the rulebook was late is finished. The rulebook arrived on 1 July 2026 and the authority is in use: 61 officers across roughly 46 agencies were certified by that date, an interim final rule at 91 FR 41466 codified the framework, and the New York City Police Department told reporters in August 2026 that it would conduct independent mitigation at the US Open.^{1,10,20,21} The question has moved from whether state and local agencies may act to what their authority is worth where it matters most.

At those settings it is worth less than the statute implies, and the rule says so plainly. Section 124.10(c) provides that where federal and SLTT operations are conducted at the same event, or overlap in geographic area and time, the federal agency is the lead counter-UAS agency, and that an SLTT agency may lead only where multiple SLTT agencies operate in an area with no federal agency involved. An agency that declines that lead agency's tactical coordination may not conduct counter-UAS operations inside the covered geography and period.¹ A National Special Security Event is by construction a federal event. So the new authority is at its most constrained precisely where the threat picture is richest, and the practical unit of analysis for the coming week is not the city's certification but the lead-agency designation and the frequency assignments that flow from it.

That is not a criticism of the design. Deconflicting jammers and takeover systems around a protected motorcade route is exactly the problem a single lead agency exists to solve. It is a correction to how the authority is being priced. For a vendor, the decision runs through an Authorized Systems List it cannot read and cannot nominate itself onto. For a corporate security director in Manhattan, the change during high-level week is a wider federal perimeter, not a new number to call. For a grant applicant, the money is real and reaches private ground only through a state administrative agency.

KEY JUDGMENTS

Five judgments anchor this read.

KJ-1	At UNGA-81, state and local counter-drone authority operates under federal tactical control. Section 124.10(c) assigns the federal lead wherever federal and SLTT operations overlap; section 124.10(d) bars operations that reject that coordination. ^{1, 39}	HIGH
KJ-2	The authority is active, but public evidence of independent mitigation remains absent. Sixty-one officers were certified across about 46 agencies by 1 July; New York's claimed US Open use remains based on concurring, non-enumerated reporting. ^{1, 10, 20, 23}	MODERATE
KJ-3	Two closed equipment lists gate the market. Agencies must use listed systems once a category is populated, nominations come from accredited agencies, and no public copy of either list was located. ^{1, 3, 23}	HIGH
KJ-4	The operational record is closed for its first six months. Individual 48-hour reports go to a federal portal; the first public accounting is the report to Congress due 18 December 2026. ^{1, 2}	HIGH
KJ-5	A second clock runs on spectrum authority. The FCC's conditional 180-day blanket authority began 2 July 2026 and lapses about 29 December absent renewal or replacement. ^{3, 23}	MODERATE

KEY STATISTICS

61 Certified officers and agencies^{1,10}	1,500 / 150 Expected detection / mitigation agencies¹	0 Public equipment lists²³	48 hours Post-operation reporting deadline¹
18 Dec 2026 First report to Congress²	29 Dec 2026 Approximate spectrum-authority lapse³	46,114 / 21 FBI docket received / posted¹⁹	3,857 FCC docket filings counted⁶
More than 700 World Cup drone seizures⁷	\$250,000,000 First FEMA grant tranche¹⁵		

Scope, method, and limits

EVIDENCE BASE

Open-source intelligence centered on the interim final rule, statute, FCC instruments, federal dockets, USAspending, FAA data, and named agency records. Collection closed 9 September 2026.

CRITICAL LIMITATIONS

No public UNGA-81 posture statement was located. Equipment lists and 48-hour operational reports are closed. Non-enumerated reporting is marked unverified, and no key judgment depends on a posture document.

TIMELINESS

CURRENT. The brief ages at UNGA-81, the first congressional report due 18 December, and the approximate 29 December lapse of blanket spectrum authority.

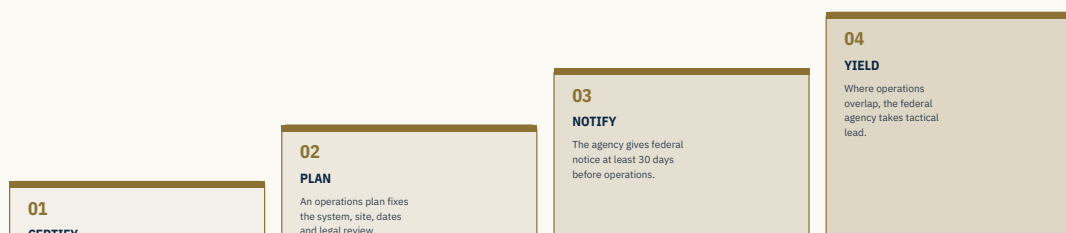
SECTION 01 • ASSESSMENT

The Lead Agency Rule

What UNGA-81 Actually Is, and Which Provision Decides It.

FIGURE 01 • OPERATING SEQUENCE

Authority narrows as the event becomes more federal



The rule grants SLTT authority but conditions its exercise. At an overlapping federal event, section 124.10(c) assigns tactical lead to the federal counter-UAS agency.

SOURCE: Interim final rule, 6 CFR 124.5 and 124.8 to 124.10, entry 1.

The high-level week is a federal security event with a state and local capability inside it. The rule assigns the lead, the coordination content and the consequence of refusing it, in text rather than by practice.

The United Nations General Assembly high-level week for the 81st session runs 18 to 28 September 2026; the session opened on 8 September 2026.¹² The United Nations records the General Debate as opening on Tuesday 22 September, continuing through Saturday 26 September and concluding on Monday 28 September.¹³ The Secret Service states that the General Assembly is an annual and recurring National Special Security Event for which it has led the security planning with the New York City Police Department and state and local government.³⁹ FedScoop reported the same for 2019 [UNVERIFIED].²⁶ No designation notice specific to the 81st session was located.²³ That class governs this section, because section 124.10(a) treats such events as ones where federal counter-UAS operations are anticipated, which fixes federal operations over the same geography and window as any city operation.¹

The interim final rule was published by the Department of Homeland Security and the Department of Justice at 91 FR 41466 on 6 July 2026, effective 1 July 2026, docket FBI-2026-0001, codified

at 6 CFR part 124 and 28 CFR part 124. It implements the SAFER SKIES Act, signed 18 December 2025 as Public Law 119-60, Division H, Title LXXXVI.^{1,2}

Section 124.10(c) is the operative provision for an event of this class. In the regulatory text: whenever federal and SLTT operations will be conducted at the same event, or will overlap in geographic area and time, the federal agency will be the lead counter-UAS agency, and an SLTT agency may lead only where multiple SLTT agencies operate in the same area and no federal agency is involved. The lead agency's tactical coordination is enumerated: assignment of system deployment locations, operating frequencies, detection and mitigation sectors, ground intercept team sectors, render safe locations, communications channels, and risk to persons and property on the surface or in the air. An SLTT agency operating under a lead agency still acts under its own certified authority at 6 U.S.C. 124n(a)(2), which distinguishes this arrangement from the deputisation model it replaces.¹

Section 124.10(d) supplies the consequence. An SLTT agency that does not accept tactical coordination by the designated lead agency may not conduct counter-UAS operations, including detection and warning operations using systems requiring the authority of and relief from certain laws under the Act, within the geographic area and time period covered by the lead-agency designation.¹ The authority does not fail open: refusal removes it inside the perimeter rather than leaving a residual right to act independently.

Section 124.10(a) sets the entry path and shows how early the subordination begins. For operations supporting National Special Security Events, events rated Special Event Assessment Rating 1 through 3, or other events where federal counter-UAS operations are anticipated, an SLTT agency should notify the local Federal Bureau of Investigation field office of its intent as early as practicable and before the 30-day advance notification standard of section 124.9.¹ Section 124.9 routes that notification through a single submission to the federal coordination portal operated by the Bureau, which distributes the data elements to the Bureau and the Department of Homeland Security for deconfliction, to the Federal Aviation Administration for airspace safety, and to the Commission for spectrum. For the Commission the process is coordination and authorization rather than mere coordination: an agency must obtain the authorization it needs before operating a system that emits radio waves.¹

Operations run on an Operations Plan under section 124.8, on a standardized form prescribed by the Attorney General, in a 30-day window for events or a 365-day standing window for fixed-site protection, signed by an Agency Approving Official at Senior Executive rank or equivalent with legal counsel certification.¹ Section 124.9 requires the advance notification not fewer than 30 calendar days before the operational period begins and states that it is not a request for approval.¹ On Aegean's arithmetic an agency intending to operate from 18 September 2026 had to notify by 19 August 2026. Whether one did is UNKNOWN.

The federal side of the perimeter does not depend on the new rule at all. Section 124n(a)(1) authorizes the Secretary of Homeland Security, whose components include the Secret Service, and the Attorney General, whose components include the Federal Bureau of Investigation, to take the protective measures at 124n(b)(1) for covered facilities or assets, and the Act added two further bases for federal action, to enforce the law and to protect the public, which the rule states it did not make available to SLTT agencies.^{1,2} The federal actor at UNGA-81 therefore holds both a wider set of authorities and, under 124.10(c), the lead.

Precedent supports the shape of the week without settling its content. For the 2019 General Assembly the Federal Aviation Administration published its temporary flight restriction notice on 20 September, one day before the restriction took effect, covering 21 to 29 September over the New York and New Jersey metropolitan area, and stating that the agency, federal law enforcement and the Department of Defense would monitor the airspace and might act against drones deemed a credible threat.¹⁴ For 2025, NY1 reported a restriction described as a 30-mile radius around the United Nations building in force the week of 23 September [UNVERIFIED].²⁵ No count of drones detected or mitigated in 2025 was published, and as of 9 September 2026 no statement on UNGA-81 counter-drone posture by the New York City Police Department, the Secret Service, the Department of Homeland Security or the Federal Aviation Administration had been located. The posture for the week is UNKNOWN.²³

ASSESSMENT • HIGH CONFIDENCE.

At UNGA-81 the new state and local authority is exercised under federal tactical control, and the operative document for the week is a lead-agency designation rather than a city certification. Rationale: section 124.10(c) assigns the lead to the federal agency wherever federal and SLTT operations overlap in geography and time, section 124.10(d) removes the authority from an agency that declines coordination inside the perimeter, and section 124.10(a) treats a National Special Security Event as a class where federal counter-UAS operations are anticipated, which the Secret Service's own record of leading General Assembly security planning corroborates.^{1,39}

ASSESSMENT • MODERATE CONFIDENCE.

The subordination is a design choice about deconfliction rather than a rollback, and is not evidence that the authority is hollow. Rationale: the same section preserves that an SLTT agency under a lead agency acts on its own certified authority at 6 U.S.C. 124n(a)(2), a materially different position from the deputized task force officer model the rule declines to address, and the coordination content is frequency and sector assignment, which is what a shared jamming environment requires.¹

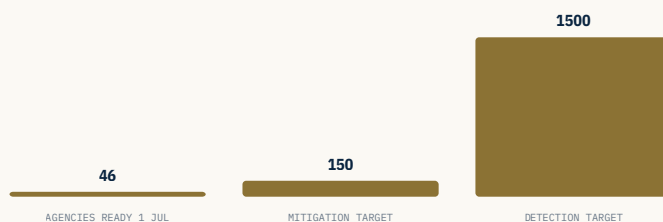
SECTION 02 • ASSESSMENT

What Is Certified, What Is Listed, and Why Neither Is Public

Two Gates, Both Closed to the Market.

FIGURE 02 • CERTIFICATION SCALE

The two-year target is far above the launch population



Approximately 46 agencies had completed training and certification at launch. The Departments expect 150 mitigation-tier and 1,500 detection-tier agencies within two years. The common scale is intentional and shows the size of the planned expansion.

SOURCE: Interim final rule, entry 1; Congressional Research Service, entry 10.

Certification is countable and small. The equipment lists are not countable at all, because they sit on a law-enforcement portal with no vendor-facing path onto them.

The first gate is training. The rule creates two certifications, both issued by the Federal Bureau of Investigation's National Counter-UAS Training Center, the sole national schoolhouse, which ran its first operator course in Huntsville, Alabama in late October 2025 with a class of 12.¹¹ A Detection and Warning Certification covers 6 U.S.C. 124n(b)(1)(A), (B) and (E), which is detection, identification, monitoring and tracking, warning, and confiscation, and issues automatically on completion of an online course. A Mitigation Certification covers (C), (D) and (F), which is disruption of control, seizure or exercise of control, and use of reasonable force to disable, damage or destroy, and requires resident instruction. Only personnel holding it may execute mitigation actions.¹ Systems that do not require the Act's relief are outside the requirement entirely: electro-optical and infrared cameras, acoustic sensors and radar operated under Commission authorization intercept no communications.¹

The counts are small and the rule says so. About 46 SLTT agencies had completed training and certification and stood ready to operate at the time of the rule, reflecting 61 individually certified officers.¹ The Congressional Research Service restated the same figures as of 1 July 2026 and listed as issues for Congress the center's capacity, certification expiry, the expense of a two-week

residential mitigation program, and training priorities beyond World Cup host cities.¹⁰ Lawfare, not an enumerated source, put the bottleneck against the size of the estate: roughly 60 certified personnel projected by June 2026 against approximately 17,500 state and local law enforcement agencies and more than 1,000 adult correctional facilities [UNVERIFIED].²⁸ The rule's Paperwork Reduction Act analysis assumes roughly 1,500 detection-tier and 150 mitigation-tier participating agencies within the first two years.¹ That figure is a burden estimate, which is a projection of how many respondents a collection will have, not a programme target and not a commitment. Aegean reads it as the Departments' working assumption about the size of the population the framework will carry, and takes one thing from it: against 46 agencies certified in July, the Departments were themselves planning for a population thirty times larger than the one that existed when the rule took effect.

The Department of Justice built a bridge over the gap and it is narrower than it is often described. The Acting Attorney General's charging policy of 12 June 2026 records that, due at least in part to delays in starting the training program, the number of officers who have completed it does not meet current public safety needs, and directs that prosecutors should not prosecute or seek penalties under chapters 119 or 206 of title 18 or under 6 U.S.C. 124n-1(f) for conduct described in 6 U.S.C. 124n(b)(1)(A) undertaken before 1 December 2026. Subparagraph (A) is detection, identification, monitoring and tracking; the policy does not reach mitigation, and the rule notes it does not shield anyone from state or local law.^{1,9}

The second gate is equipment, and it is the one the market cannot see. Section 124.7 creates two lists: the Authorized Technologies List identifies the categories of technology authorized for SLTT use, the Authorized Systems List identifies specific systems within them. Until the systems list is populated for a category an agency is limited to the listed categories; once it is populated, the agency must use a listed system.¹ The Departments expect the initial technologies list to cover radio frequency detection with command-and-control signal interception, radio frequency disruption in the form of broadband and protocol-specific jamming, and radio frequency protocol manipulation in the form of command injection and cyber takeover, and expect the systems list to be populated in phases, drawing first on systems with existing federal deployment history under 10 U.S.C. 130i, 6 U.S.C. 124n, 10 U.S.C. 6227 or 50 U.S.C. 3515a.¹

Two features of that design decide the vendor question. First, the nomination path does not run through vendors: accredited agencies submit nominations, and feedback on listed systems, through an internal process announced on the federal coordination portal, which houses the list. The Departments said they expected a 60-day sprint to consider revisions following publication of the rule; 60 days from 6 July 2026 fell on 4 September 2026, and no public output was located.^{1,23} Second, the lists are not published anywhere a vendor can read them. The Federal Communications Commission states in DA 26-656 that both lists will be maintained on the Law Enforcement Enterprise Portal maintained by the Federal Bureau of Investigation.³ Aegean found no public copy

of either on fbi.gov, dhs.gov, justice.gov or federalregister.gov as of 9 September 2026; the fbi.gov and justice.gov counter-UAS pages returned 404 and the dhs.gov page returned 403. The contents of both lists are UNKNOWN to anyone without portal access. DroneLife, not an enumerated source, agrees that the lists are maintained through that portal [UNVERIFIED].^{27,23}

The rule also permits accredited SLTT agencies to support non-accredited ones through mutual aid or another written arrangement.¹

The public comment record is, for now, unreadable. Docket FBI-2026-0001 shows 46,114 comments received as recorded by the Federal Register's check of regulations.gov on 6 September 2026, against 21 posted as of 9 September, on a window that ran 6 July to 4 September 2026.¹⁹ The received figure may include duplicate or campaign submissions, and the two counts are not one series. Who objected, and on what grounds, is UNKNOWN.

ASSESSMENT • HIGH CONFIDENCE.

The binding constraint on a counter-UAS vendor selling into the SLTT market is placement on a list it cannot read, through a nomination process it cannot initiate. Rationale: section 124.7 makes a listed system mandatory once its category is populated, nominations come from accredited agencies through an internal portal process, the Commission states the lists live on the Law Enforcement Enterprise Portal, and no public copy of either existed on 9 September 2026.^{1,3,23}

ASSESSMENT • MODERATE CONFIDENCE.

Certification throughput, not authority, is the near-term limit on SLTT counter-drone activity. Rationale: 61 officers across about 46 agencies were certified as of 1 July 2026 against a burden estimate of roughly 1,500 detection-tier and 150 mitigation-tier agencies within two years, the Congressional Research Service names schoolhouse capacity as an issue for Congress, and the mitigation tier requires resident instruction rather than an online module.^{1,10}

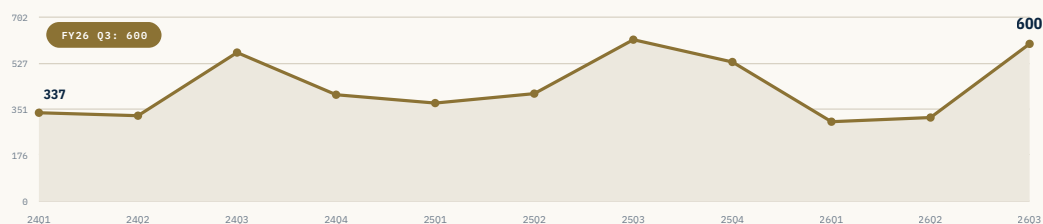
SECTION 03 • ASSESSMENT

The Record That Does Not Exist

Reporting Runs to a Closed Portal, and the First Public Accounting Is in December.

FIGURE 03 • REPORTED SIGHTINGS

The World Cup quarter returned the series near its high



FAA public-record files contain 600 reported sightings in FY2026 Q3, the World Cup quarter, versus a series high of 616 in FY2025 Q3. Reports are unverified sightings, not confirmed drones or mitigation actions.

SOURCE: FAA UAS Sightings Report, eleven quarterly files, entry 16; Aegean row count.

Every mitigation action generates a detailed federal report within 48 hours. None of it is published. Before 18 December 2026 the only question a buyer or a legislator can actually ask is whether anything reached the press, which is a different question.

Section 124.13(a) requires a post-operation report within 48 hours of whichever occurs first: any mitigation action described in 6 U.S.C. 124n(b)(1)(C), (D) or (F); any confiscation under (b)(1)(E); or the conclusion of an operation where notification was provided. The required content is granular, running from date, time, location and the credible threat through the specific system used by reference to the Authorized Systems List, with its make, model, hardware version, firmware revision and software version, to any known operational effects. Reports are filed through the designated federal coordination portal.¹

Nothing in section 124.13 requires public disclosure of an individual report.¹ The chain runs upward instead. Section 124.13(i) provides that the Federal Bureau of Investigation will compile post-operation reports and semiannual summaries to support the biannual report required by 6 U.S.C. 124n(d)(2)(D) and the semiannual briefings required by 6 U.S.C. 124n(g). Detection-only agencies report a total number of detection events in a semiannual summary.¹

The statutory deadline is the date that matters. Under 6 U.S.C. 124n(d)(2)(D), not later than one year after 18 December 2025 and biannually thereafter, the Attorney General must submit an unclassified report with a classified annex to the appropriate congressional committees, including a

list of SLTT agencies certified, a list of currently authorized technologies, the frequency, location and circumstances of mitigation deployments and the types employed, and a determination on whether SLTT agencies can fully protect critical infrastructure.² That report, due by 18 December 2026, is the first scheduled public accounting of what this authority has done and the first scheduled public statement of what is on the technologies list.

A second channel is faster and equally closed. Section 124.11 requires notification to air traffic control on activation of any counter-UAS system for mitigation action, at five minutes or as soon as operationally practicable, with a follow-up confirming termination, and applies to non-radio-frequency mitigation too.¹ That produces a contemporaneous federal aviation record of every mitigation event, not a public one.

What the public record does contain is the World Cup, the right baseline precisely because it is the largest counter-drone operation the United States has run and it produced no SLTT-independent mitigation. The Federal Aviation Administration reported on 22 July 2026 that federal, state and local partners carried out the most comprehensive airspace security and drone mitigation effort in United States history during FIFA World Cup 2026, seizing more than 700 unauthorized drones, with no-drone zones through nearly 250 temporary flight restrictions and ground intercept teams at venues, the seizures attributed to the Federal Bureau of Investigation and the Department of Homeland Security across all eleven host cities.⁷ The structure was federal: state and local officers trained by the Bureau were embedded in Bureau-led task forces at venues and associated sites.⁸ The rule records over 600 drone incursions into restricted airspace across host-city venues as of 20 June 2026, citing Reuters reporting that agencies had seized more than 300 drones near World Cup sites by 23 June.^{1,33} The Transportation Security Administration published daily counts during the tournament, though only the title of its 18 June release rendered to retrieval.³²

The New York region record shows the same structure. New York Daily News reporting carried by Officer.com states that 97 drones were seized by the New York City Police Department with state and federal partners between 13 June and 3 July 2026 at MetLife Stadium, fan zones and watch parties, by electronic disablement and seizure, and that all were remote-controlled hobbyist models; NY1 reported the same figure for joint teams across the region by 4 July [UNVERIFIED both].^{21,24} At that date the department's officers were acting inside federal task forces rather than under independent authority, which the rule describes as the pre-existing mechanism and expressly declines to address: the Bureau is currently using SLTT agencies as federally deputized task force officers in mitigation operations, and most personnel the training center has trained are already federally deputized.¹

The August claim of independence is the genuinely new event, and it has the weakest sourcing in this brief. CBS News New York reported on 21 August 2026 that Police Commissioner Jessica Tisch said the US Open "will be the first event in the country where state or local law enforcement conducts independent drone mitigation operations," and that Deputy Commissioner Rebecca

Weiner said the rulemaking authority allows the department for the first time to use its own people, tools and equipment under independent authority. NY1 and Police1, the latter reprinting New York Daily News, carry the same statements [UNVERIFIED throughout].^{20,21,22} No nyc.gov primary was located, and no report of an actual mitigation action by the department under its own authority at the US Open, which ran 24 August to 13 September 2026, had been located as of 9 September 2026.²³

ASSESSMENT • HIGH CONFIDENCE.

No member of the public, no vendor and no legislator can establish before 18 December 2026 whether an SLTT mitigation action has occurred, except by press report. Rationale: the 48-hour report goes to a closed portal with no publication requirement, the semiannual and biannual channels aggregate rather than disclose, and the statute fixes the first unclassified report at one year after 18 December 2025.^{1,2}

ASSESSMENT • MODERATE CONFIDENCE.

The most likely public record of the coming week is a seizure count, not a mitigation count, on the World Cup pattern. Rationale: the World Cup produced more than 700 seizures with no reported SLTT-independent mitigation, the New York figure of 97 was joint-team work under federal task force structure, and seizure under 6 U.S.C. 124n(b)(1)(E) is available at the detection tier while mitigation requires resident-trained personnel and a listed system.^{1,7,24}

SECTION 04 • ASSESSMENT

The Spectrum Clock

A 180-Day Authorisation, Conditioned on a List Nobody Can Read.

Every radio-frequency counter-drone action needs Commission authorisation. The instrument that supplies it today was granted on the Commission's own motion, expires about 29 December 2026, and is conditioned on using a system from the Authorized Systems List.

The rule is explicit that spectrum is an authorization question and not merely a coordination one: an SLTT agency must obtain the authorization it needs from the Federal Communications Commission before operating a counter-UAS system that emits radio waves.¹ On 2 July 2026 five Commission bureaus conditionally granted special temporary authority on their own motion for 180 days to SLTT law enforcement and correctional agencies to conduct counter-UAS operations complying with the SAFER SKIES Act, using any system on the Authorized Systems List, on condition that operations comply with the Act and the rule and that systems follow any operating restrictions stated on that list. The order states that the authority commences on 2 July 2026 and continues for

180 days, and waives parts 1, 2, 15, 22, 24, 25, 27, 30, 73, 74, 78, 80, 87, 90, 95, 96, 97 and 101 to the extent necessary.³ One hundred and eighty days from 2 July 2026 is about 29 December 2026 on Aegean's arithmetic.

Two features of that instrument are load-bearing. First, it is temporary and self-terminating rather than a rule change, and no public notice renewing it, replacing it or announcing its expiry had been located as of 9 September 2026, so its position after that date is UNKNOWN.²³ Second, its condition points at the Authorized Systems List, which is not public and is populated on a phased basis by category. An agency operating under a category-level Authorized Technologies List designation is covered only if the system it uses is also on the Authorized Systems List and it complies with the order's frequency-coordination conditions.^{1,3} The public record does not reveal which categories have populated systems lists or which systems and frequencies an agency has been assigned. That opacity prevents an outside observer from testing compliance; it does not imply that an agency with portal access lacks the information or that any agency is operating unlawfully. A categorical authorisation, which the rule says the Departments and the Commission will work to establish, would replace this temporary instrument and make the legal path less dependent on case-specific list and frequency conditions.¹

The rule anticipates the durable fix. It records that the Commission may issue expedited waivers under its part 2 authority, including 47 CFR 2.1204, for equipment already in use and for equipment needed to address a newly identified or evolving threat, and that the Departments and the Commission will work to establish standing or categorical authorizations and a vendor equipment authorization pathway.¹ That pathway is what a vendor should track, because it is the only described route by which a manufacturer reaches the framework directly rather than through an accredited agency's nomination.

PS Docket 26-189 is the other Commission proceeding in this space and it should not be confused with the counter-drone equipment question. On 21 July 2026 the Public Safety and Homeland Security Bureau and the Office of Engineering and Technology proposed to prohibit continued importation and marketing of foreign-produced unmanned aircraft systems and critical components that are both on the Covered List and military-grade, defined by seven categories running from 55 pounds or more on takeoff through thermal imaging, light detection and ranging, docking stations and swarming systems; the prohibitions exempt domestically produced systems, federal use, and continued operation of systems already purchased.⁴ Comments were due 2 September 2026 and on 28 August the Bureaus denied three extension requests.⁵ Aegean counted the full filing set on 9 September 2026 at 3,857 filings, peaking at 443 on 1 September with 3,746 in by the deadline; filers include public safety agencies and many small commercial operators.⁶ The proceeding restricts drones, not counter-drone equipment, and the public-safety objection in the record concerns agencies' own fleets rather than their counter-UAS systems.

ASSESSMENT • MODERATE CONFIDENCE.

The spectrum authorisation is the nearest live failure point in the framework and the one with a fixed date. Rationale: the instrument is a 180-day special temporary authority from 2 July 2026, granted on the Commission's own motion, conditioned on using a system on a list that is not public, and no renewal, replacement or expiry notice had been located as of 9 September 2026.^{3,23}

ASSESSMENT • MODERATE CONFIDENCE.

PS Docket 26-189 will shape the drone fleets SLTT agencies fly, not the counter-drone systems they buy, and should be tracked separately. Rationale: the proposed prohibitions reach importation and marketing of foreign-produced Covered List systems in seven military-grade categories and exempt federal use, while the counter-UAS equipment path runs through the Authorized Systems List, the special temporary authority and part 2 waivers.^{1,3,4}

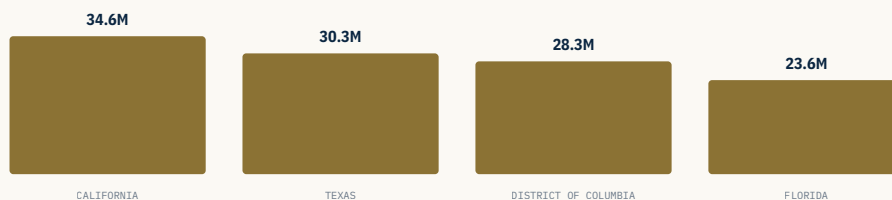
SECTION 05 • ASSESSMENT

What Follows for a Vendor, a Manhattan Security Director, and a Grant Applicant

The Money Reaches Private Ground Only Through a State Administrative Agency.

FIGURE 04 • FIRST GRANT TRANCHE

The four largest awards account for nearly half the tranche



Top four awards in the twelve-award, \$250 million first tranche. All recipients are state-level administrative entities; New York received \$17.7 million.

SOURCE: USAspending Assistance Listing 97.161, entry 15; Aegean computation.

Three buyers, three constraints, one common feature: none is served by treating the September event as a market signal in itself.

The appropriated money is the clearest signal of federal preference and it is already spent. USA Spending records twelve awards under Assistance Listing 97.161, the Counter-Unmanned Aircraft Systems Grant Program, all obligated 30 December 2025 with a period of performance to 30 September 2028, summing to exactly \$250,000,000, from California at \$34,591,628 down to Kansas at \$5,341,058, with New York State at \$17,731,725. No second-tranche award was located as of 9 September 2026.^{15,23} The tranche was announced by the Department of Homeland Security on 30 December 2025 through the Federal Emergency Management Agency's counter-UAS grant program, to enhance SLTT detection, identification, tracking and monitoring capability ahead of the World Cup; the Federal Aviation Administration describes a \$500 million program with the first \$250 million awarded to host cities and states.^{1,7,34,35} The second \$250 million is announced but not obligated on the public record: no notice of funding opportunity or award was located on 9 September 2026, and the agency's program pages did not render to automated retrieval.²³

Recipients are state administrative agencies. That is the structural fact for a private site: a stadium, a utility, a port, a data centre or a corporate campus reaches this money only as a subrecipient through a state or local pass-through, and reaches the mitigation half of the program not at all, because mitigation runs to law enforcement and correctional agencies whose personnel are trained at the National Counter-UAS Training Center.^{1,15,38}

For a vendor seeking Authorized Technologies List placement, the sequence is fixed by the rule rather than by a sales cycle. Category placement comes first, because until the systems list is populated for a category an agency is limited to listed categories, and the Departments expect the initial technologies list to cover radio frequency detection with control-signal interception, radio frequency disruption and radio frequency protocol manipulation.¹ A system outside those three has no described route until the list expands. Nomination to the systems list comes from an accredited agency through an internal portal process, so the commercial motion is to be the system an accredited agency nominates: field with agencies that already hold certification and, on the Departments' stated sequencing preference, show existing federal operational deployment under 10 U.S.C. 130i, 6 U.S.C. 124n, 10 U.S.C. 6227 or 50 U.S.C. 3515a.¹ That preference is the part a vendor without a federal record should price: on the rule's own sequencing the early systems list is drawn from federally deployed equipment, and the accredited population that can nominate anything is 46 agencies.¹ Section 124.4 sets the boundary on services: design, manufacture, sale, installation, maintenance, technical support, operator training, diagnostic data receipt under section 124.14(j) and detection outside the Act are permitted; operating a system that requires the Act's authority, including under a turnkey or managed services label, is not.¹

For a New York corporate security director, the change is in the federal perimeter, not in the private toolkit. Nothing in the Act or the rule gives a private operator any new authority, and the position Aegean set out in August holds without amendment.³⁸ What changes between 18 and 28 September is the density of federal airspace restriction around midtown and the presence of

federal counter-UAS operations under a lead-agency designation. On the 2019 precedent the notice arrives about a day before the restriction, so the geometry should be expected between 15 and 22 September rather than planned against now.¹⁴ The planning items that survive that uncertainty do not depend on the geometry: confirm whether the site sits inside the restricted area once the notice publishes; suspend the site's own drone operations for the window; establish which agency answers a drone report at the site and on what number, given that a certification is an eligibility to act and not a duty to respond; and record any sighting in reportable form, because the aggregate SLTT record under section 124.13 feeds the determination Congress ordered on whether SLTT agencies can fully protect critical infrastructure.^{1,2}

For an SLTT grant applicant the constraint is timing against three dates rather than eligibility. The first tranche is fully obligated to 30 September 2028 and the second has no notice of funding opportunity.^{15,23} The report due by 18 December 2026 must list certified agencies and currently authorized technologies and reach the critical infrastructure determination, which makes it the first document against which a state can benchmark itself.² And the special temporary authority lapses about 29 December 2026, so an agency planning a fiscal year 2027 radio-frequency deployment is planning against an authorisation that does not currently extend into it.³

New York's governor demanded state counter-drone authority after the December 2024 Stewart Airport runway closure; the legislative route is still stalled.³⁶ S. 4380, the Critical Infrastructure Airspace Defense Act, was introduced 22 April 2026 and referred to Homeland Security and Governmental Affairs, with no subsequent action and the record last updated 1 July 2026.¹⁷ H.R. 9232, its House companion, was introduced 9 June 2026 and referred on 7 July 2026 to the Subcommittee on Transportation and Maritime Security, record last updated 14 July 2026.¹⁸ That referral is the only movement on either bill since Aegean's August brief, and it is procedural.

Two context figures, flagged. The Secret Service opened about 10,000 protective intelligence investigations between 1 January and 22 July 2026, roughly 40 per cent above the same period of 2025, stated by Director Sean Curran on 22 July 2026 and reported by Straight Arrow News, WTOP and Axios, none enumerated and no secretservice.gov primary located [UNVERIFIED, three-outlet concurrence].^{29,30,31,23} The Federal Aviation Administration's sighting record, counted by Aegean at 4,789 reports across eleven quarterly datasets, measures reporting and sensor placement before behaviour.¹⁶

ASSESSMENT • HIGH CONFIDENCE.

The federal money in this framework reaches a private site only through a state or local government subrecipient, and its mitigation component does not reach one at all. Rationale: all twelve first-tranche awards under Assistance Listing 97.161 went to state administrative agencies, the rule restricts mitigation to certified law enforcement and correctional agencies, and section 124.4 prohibits contractor operation of systems requiring the Act's authority.^{1,15}

ASSESSMENT • MODERATE CONFIDENCE.

A vendor's most valuable near-term asset in this market is a certified agency willing to nominate its system, not a product feature. Rationale: nominations come from accredited agencies through an internal portal process, the Departments state a sequencing preference for systems with existing federal deployment history, and the rule describes no vendor-initiated route beyond a future equipment authorization pathway the agencies say they will establish.¹

SECTION 06 • DECISION

Decision

Decision	Owner	Trigger	Pre-authorised action
Pursue technologies-list category placement before a systems-list nomination	C-UAS vendor, government affairs	The 18 December 2026 report publishes the list of currently authorized technologies	If the modality is a listed category, brief every certified agency in the fielded base on the nomination process; if not, redirect the roadmap or seek a category addition through an accredited agency sponsor. ^{1,2}
Field with certified agencies rather than with prospects	C-UAS vendor, sales leadership	An accredited agency in the pipeline confirms Mitigation Certification	Reprice the deployment as a nomination-generating placement and make systems-list feedback through the federal coordination portal a contract term. ¹
Strike managed and turnkey mitigation scope from every SLTT proposal	C-UAS vendor, contracts	Immediate; the prohibition is in force	Reissue affected proposals as design, manufacture, sale, installation, maintenance, technical support, operator training and non-Act detection services only. ¹
Set the site posture from the published notice, not from forecast	New York corporate security director	Publication of the UNGA-81 flight restriction, expected 15 to 22 September on the 2019 precedent	Confirm whether the site falls inside it, suspend the site's own drone operations for the window, and issue the geometry to the security operations centre and facilities. ¹⁴
Establish the answering agency before the week, not during it	New York corporate security director	Immediate	Obtain in writing which agency responds to a drone report at the site during an NSSE window, at what hours and on what number, recording that a certification is an eligibility to act rather than a duty to answer. ¹
Hold FY2027 radio-frequency mitigation procurement against the spectrum date	SLTT grant applicant, state administrative agency	About 29 December 2026 on Aegean's arithmetic, or an earlier Commission public notice	If the authority is renewed or replaced by a categorical authorisation, release the procurement; if it lapses, restrict the buy to detection systems outside the Act. ^{1,3}
Benchmark the state's position against the December report before writing the next application	SLTT grant applicant	Publication of the 6 U.S.C. 124n(d)(2)(D) report, due by 18 December 2026	Compare the state's certified-agency count and technology holdings against the published lists and write the gap into the next application. ²

Decision	Owner	Trigger	Pre-authorized action
Structure private-site protection as a subrecipient arrangement or not at all	SLTT grant applicant with private critical infrastructure in scope	A second-tranche notice of funding opportunity	Pre-identify the local government pass-through and the site's subrecipient role, and exclude mitigation equipment from any private-site line. ^{1,15}

SECTION 07 • OUTLOOK

Outlook

Three Scenarios, Through 30 June 2027.

Construction confidence reflects analytical quality rather than probability. Each scenario carries the observable that would confirm it.

Baseline • Subordinated Exercise. Construction confidence: High • Velocity: Gradual. The framework runs as written. SLTT agencies operate at federal events under lead-agency designations, certification throughput rises slowly from 61 officers, the equipment lists stay on the Law Enforcement Enterprise Portal and become visible only through the December report's list of currently authorized technologies, and the special temporary authority is renewed or replaced without a gap. Mitigation actions occur and are not individually reported. SIGNAL TO WATCH: a Federal Communications Commission public notice in GN Docket 26-74 before 29 December 2026; publication of the 6 U.S.C. 124n(d)(2)(D) report on or before 18 December 2026; a second-tranche notice of funding opportunity under Assistance Listing 97.161.

Consolidation • The Federal Lead Absorbs the Authority. Construction confidence: Moderate • Velocity: Gradual. Deconfliction burden, schoolhouse capacity and the spectrum condition combine so that the practical model at any significant event reverts to federally led task forces with SLTT personnel inside them, the model the rule declines to address and which most trained personnel already sit in. Independent SLTT operations concentrate instead in fixed-site correctional protection under the 365-day standing window, where no federal operation overlaps, and the buyer of record stays federal while the SLTT market grows in detection rather than mitigation. SIGNAL TO WATCH: the December report showing mitigation deployments concentrated in correctional or fixed-site settings; certification counts still under 150 mitigation-tier agencies at the two-year mark; renewed reliance on deputisation language in agency statements.

Widening • A Consequence Event Reopens the Statute. Construction confidence: Moderate • Velocity: Event-driven. An incident at a United States event or critical infrastructure site produces casualties or a sustained outage. The determination required at 6 U.S.C. 124n(d)(2)(D)(vii) lands negative, the stalled Critical Infrastructure Airspace Defense Act bills move, and authority extends to a defined class of critical infrastructure under federal training and an approved equipment list.

Demand steps up for listed systems and for federally certified personnel. **SIGNAL TO WATCH:** committee action on S. 4380 or H.R. 9232; a negative determination in the December report; an emergency designation of a class of covered facilities.

Forward claims. Three claims are proposed with this report. Each probability is the analyst's own judgment call, not a model output. No sufficiently comparable public reference class was available, so the probabilities are not base-rate estimates.

DEF-1-C1. At least one mitigation action taken by a state, local, tribal or territorial law enforcement or correctional agency under its own authority at 6 U.S.C. 124n(a)(2), meaning conduct described at 6 U.S.C. 124n(b)(1)(C), (D) or (F) and not detection, warning or confiscation by hand, occurring anywhere in the United States between 18 and 28 September 2026 inclusive, is publicly reported by 31 October 2026. Probability 0.20, the analyst's own judgment call.

DEF-1-C2. The Authorized Systems List or the Authorized Technologies List, or any portion of either identifying specific technology categories or specific systems, is published in a publicly readable form not requiring law-enforcement credentials, on or before 31 December 2026. Probability 0.55, the analyst's own judgment call.

DEF-1-C3. The blanket special temporary authority granted to state, local, tribal and territorial agencies by FCC DA 26-656 on 2 July 2026 is renewed, extended, or replaced by a categorical or standing authorisation covering the same class of operations, with effect on or before 31 January 2027. Probability 0.75, the analyst's own judgment call.

Indicators. Four observables would move this read before any claim resolves: publication of the UNGA-81 temporary flight restriction and any accompanying statement naming a lead counter-UAS agency, expected 15 to 22 September 2026; any Commission release in GN Docket 26-74 touching the 2 July 2026 special temporary authority; any federal statement or nyc.gov primary confirming a specific SLTT agency's Mitigation Certification; and a second-tranche notice of funding opportunity or award under Assistance Listing 97.161.

SECTION 08 • SCORECARD

Scorecard

CLM-2026-157, made 19 June 2026 in AIG-DEF-26-003, resolves-by 30 June 2026, probability 0.65, MODERATE, status open.

The claim: the SAFER SKIES Act reauthorizes federal authority to 2031 and creates a first state and local mitigation pathway, but is gated behind training, certification, and implementing rules due around June 2026; the door is open, the rulebook is late.

The reading is that this is a mis-specified claim, not a hit and not a miss, and the firm should record it as such rather than resolve it either way. Every substantive element is correct on the record: 6 U.S.C. 124n(j) sunsets federal authority on 30 September 2031 and SLTT authority on 31 December 2031; the Act created the first SLTT mitigation pathway; and that pathway is gated behind certification at the National Counter-UAS Training Center and behind the implementing rule.^{1,2} The rule took effect on 1 July 2026 and published on 6 July, one day and five days after the claim's resolves-by date of 30 June 2026.¹ The defect is construction. The claim bundles four assertions of present fact with one implied forward assertion about timing, and sets a resolution date one day before the event that would have tested it. Scored on 30 June 2026 it reads as a hit on every element, because the rulebook was late on that date. Scored one day later it reads as overtaken. Neither scoring tells the firm anything about the quality of the judgment, which is what the ledger is for.

Aegean's recommendation to the director is to close CLM-2026-157 as MIS-SPECIFIED with the substance recorded as correct, and to replace it prospectively with the three claims in this brief, each of which fixes a single proposition to a named public source and a named date. The lesson will recur across the slate: a claim of the form "X is true and Y is late" has no resolution rule, and a resolves-by date must postdate the event that would settle it.

CLM-2026-166, made 19 June 2026 in AIG-DEF-26-003, locked 8 September 2026, resolves-by 19 June 2027, probability 0.65, MODERATE. The claim: Baseline, a slow rule-out with the gap intact, is the most probable twelve-month path.

This brief advances it and does not resolve it. Three observations run in favour: the rule arrived and is in force, which is the rule-out proceeding; the gap is intact for private critical infrastructure owners, who gained no authority and reach the grant money only as subrecipients; and the two bills that would close it have not moved beyond a subcommittee referral.^{1,15,17,18} One runs against the word "slow": the rule took effect before notice and comment on a good-cause rationale naming the World Cup and the 250th-anniversary observances, and the authority went from statute to exercised in roughly seven months.¹ Aegean reads Baseline as tracking, with the qualification that the rule-out has been faster than the June brief implied while the gap it leaves for private owners has not narrowed.

SYNTHESIS

Authority is real; control and market access remain federal

The rule opens state and local operations while concentrating tactical lead, equipment eligibility, reporting, and spectrum permission in federal channels.

01 • EVENT

Federal lead at UNGA-81

Overlap with federal operations makes the federal agency tactical lead under section 124.10(c).

02 • EQUIPMENT

Closed lists gate vendors

A vendor cannot read the systems list or nominate itself through the published process.

03 • RECORD

Operations remain private

Individual reports go to a closed portal; public accounting begins in December.

04 • SPECTRUM

The nearest fixed clock

Blanket FCC authority expires about 29 December unless renewed or replaced.

At a federal security event, the operational question is not whether a city holds authority. It is which federal agency leads, which system is listed, and which frequency is assigned.

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A E G E A N I N T E L L I G E N C E G R O U P

Publishable Market Research

Timeliness. Current to 9 September 2026. UNGA-81 high-level week runs 18 to 28 September; the first public accounting is due 18 December.

Classification. PUBLIC. Open-source intelligence and analytic product. No client-attributable material is used.

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