



RiskIntelligence

# Monthly Intelligence Report

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# Monthly Intelligence Report

This report includes an overview of attacks against merchant vessels over the past month in three focus regions (West Africa, the western Indian Ocean and South East Asia) as well as assessments of different types of threats in these regions. These areas are currently considered to be the global regions where the threat of such attacks is most significant.

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# Monthly focus: Tensions in the South China Sea

## Background

China's claim on the South China Sea is a complex and multifaceted issue involving multiple countries and overlapping territorial claims. The claims have angered the Philippines and other competing claimants such as Brunei, Indonesia, Malaysia, Taiwan, and Vietnam. The Philippines government claims the northeastern section of the Spratly Islands as the Kalayaan Island Group, in addition to the Scarborough Shoal.

China not only claims the entirety of the island group and the Scarborough Shoal, but also exercises control of the body of water enclosed within the nine-dash line promulgated by China that overlaps with the Philippines' EEZ and continental shelf.



*Chinese maritime militia vessels approach a Philippines supply ship off the Second Thomas Shoal in the South China Sea (Photo: Chinese coastguard)*

## Recent developments

Since the start of 2024, China has been harassing ships inside the Philippines' EEZ, most notably near the Second Thomas Shoal and Scarborough Shoal. Despite the Philippines and the United States having carried out several joint patrols in the South China Sea, China has continued to conduct similar activity with its naval and air forces in the disputed waters. The Philippines' security alliance with the United States has failed to deter China from escalating more coercive grey zone tactics. These tactics have included ramming, shadowing, blocking, encircling, firing water cannons and the use of military-grade lasers against civilian and military vessels.

China has deployed its coastguard and its maritime militia vessels. These are comprised of fishermen who are trained and equipped by the military to patrol, loiter in, and occupy disputed areas and establish a quasi-permanent presence in the targeted country. In March, there was a surge in the number of Chinese maritime militia vessels in the South China Sea when the Philippines held joint military exercises with US forces in the area.

China recently announced a new policy, effective on 15 June 2024, that authorises its coastguard to employ lethal force against foreign ships in its territorial waters and detain foreigners crossing into waters claimed by China without trial for 60 days. The law renewed a reference to legislation from 2021 that says China's coastguard can fire upon foreign ships if necessary. The most recent incident recorded after the new policy was implemented was on 17 June 2024 when the Philippine Navy ship BRP SIERRA MADRE collided with a Chinese coastguard vessel near the Spratly Islands.



*Philippines coastguard ship BRP BAGACAY being hit by water cannon from Chinese coastguard vessels near the Chinese-controlled Scarborough Shoal (Source: Philippines coastguard)*

## Escalating multilateral issue

The South China Sea is a strategic maritime area that stretches between China and several Southeast Asian countries such as Brunei, the Philippines, Indonesia, Malaysia and Vietnam. The region contains an abundance of natural resources as well as oil and gas reserves. In addition to its resource potential, the South China Sea is the most vital commercial route for the global logistics industry and an important economic sub-region in the Indo-Pacific.

China has laid claims to uninhabited islands in the South China Sea and has created artificial islands not only to extend its military power, but also to extend its territorial claims on the sea. China has made substantial claims in the South China Sea, the East China Sea and other areas of the Indo-Pacific based on its nine-dash line. These claims and regular efforts to extend its physical occupation have resulted in China following a new concept, which can be termed as 'maritime territorialisation'.

While some other countries are also attempting to expand their maritime reach, China's expansion is threatening and has adversely affected the interests of many Southeast Asian countries. In a 2016 arbitration ruling, a United Nations tribunal ruled that there was no basis for the nine-dash line to justify the claims of China on the South China Sea. Although China's claims in the South China Sea were invalidated, China – along with Taiwan's government – rejected the ruling.

In recent years, satellite imagery has shown China's increased efforts to reclaim land in the South China Sea by physically increasing the size of islands or creating new islands altogether. In addition to piling sand onto existing reefs, China has constructed ports, military installations, and airstrips, particularly in the Paracel and Spratly Islands, where it has twenty and seven outposts respectively. China has militarised Woody Island by deploying fighter jets, cruise missiles, and a radar system.

Amid the rise in tensions with China, the Philippines has strengthened its partnerships with other Indo-Pacific neighbours. The Marcos government has signed deals to increase base access, joint exercise training, and weapons transfers with the United States. In March 2024, US Secretary of Defense Lloyd Austin confirmed that the US Mutual Defense Treaty with the Philippines extended to both countries' armed forces, public vessels, and aircraft in the South China Sea. In April, US President Joe Biden vowed that the United States would defend the Philippines from any attack in the South China Sea, signalling support for Manila.

The United States, which maintains important interests in ensuring freedom of navigation and securing shipping routes, has expressed support for an agreement on a binding code of conduct and other confidence-building measures. China's claims potentially threaten routes which are important maritime passages that facilitate trade as well as the movement of naval forces.

To protect its political, security, and economic interests in the region, the US government has challenged China's assertive territorial claims and land reclamation efforts by conducting freedom of navigation operations and bolstering support for Southeast Asian partners. Its defence treaty with the Philippines could draw the country into a potential China-Philippines conflict over the substantial natural gas deposits or lucrative fishing grounds in disputed territories.

Meanwhile, Japan is also concerned over China's actions that obstruct the freedom of navigation and increase regional tensions. Japan has stepped up its presence in recent years by selling military equipment to the Philippines and Vietnam to improve maritime security capacity. In April, the United States, Japan and the Philippines held their first trilateral joint meeting to strengthen ties. In addition, the meeting also pulled Japan into the South China Sea security as Japan has become increasingly assertive in enhancing its security relationship with Southeast Asian states.

## Conclusion

With both China and the Philippines intent on pushing their claims to the Second Thomas Shoal and the broader Spratly Islands, the area could be a time bomb for future conflict. The recent spate of clashes involving the Philippines and China has already increased the possibility of a miscalculation erupting into a wider clash that draws in the United States and others.

China is likely to continue to employ its grey zone tactics against the Philippines, even if none of the parties sees further escalation in their interests at the present time. While there have been virtually no impacts on merchant ships in international trade, the overall situation should be closely monitored to identify potential challenges as soon as possible.

### Additional services

The Risk Intelligence System provides clients with real-time intelligence and situational awareness that will assist in avoidance of threats for operations around the globe. Moreover, Risk Intelligence offers ship operators the possibility to purchase security intelligence for individual ports and terminals. Bespoke services such as vessel-specific or voyage-specific risk assessments can also help to determine and to mitigate persistent or emerging security threats and risks.

In addition, frequent webinars provide in-depth updates, mini masterclasses in situational awareness methodology, and analysis of current events. Schedules and registration forms can be found at [riskintelligence.eu/webinars](https://riskintelligence.eu/webinars).

# Update: Maritime dimensions of the war in Ukraine

## Situation on land

Russian forces continued to attack Ukrainian civilian infrastructure in June while Ukrainian retaliatory attacks were also reported, including on Russian naval vessels and infrastructure. There was also one mine-disposal incident in Ukrainian waters. The extent of power outages impacting port and other maritime operations is understood to vary locally, some disruptions to port operations are likely.

Several political meetings which had Ukraine on the agenda to varying degrees were held in June. While all of these assemblies showed continued solidarity towards Ukraine, action – in actual delivery of monetary or military aid packages – will remain crucial. Recent reports indicate that the morale of Ukrainian soldiers remains high, provided deliveries of Western-promised supplies arrive. Deliveries in sufficient quantities therefore remain a concern for the ongoing ability of Ukrainian forces to counter Russian operations.

The contact line has hardly shifted in June, with Ukrainian troops managing to stall the initial momentum of Russian forces, especially towards Kharkiv.

Any significant military developments on land have continued to be difficult for both sides. In May, the military advantage on the ground favoured the Russian forces, but this advantage diminished during June.



*Turkish, Romanian and Bulgarian forces will commence operations to remove mines from the Black Sea in July (Photo: Turkish Navy)*

## Black Sea

Commercial maritime traffic in the Ukrainian Black Sea corridor, also known as the 'humanitarian corridor' which includes the ports of Odessa, Chornomorsk and Pivdenny, continued throughout

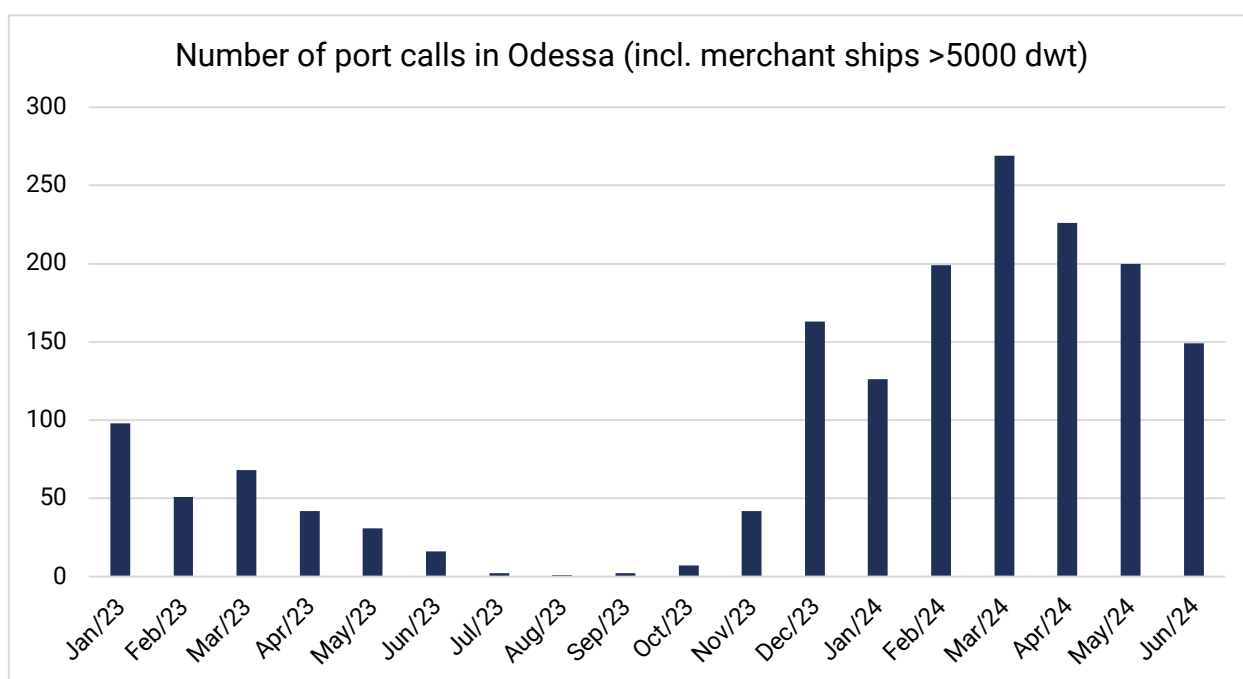


June. The general threat level for vessels transiting the corridor is limited, reflecting what is now assessed as a relatively stable and secure passage.

However, attacks on Ukrainian civilian infrastructure, particularly the electricity grid, continued in June and have previously impacted the power supply for ports. Similar disruptions cannot be ruled out. The threat from military operations is considered high. This includes naval mines in the Black Sea. A mine demolition incident was reported in mid-June near the Odessa coastline.

Various military operations and engagements in the north-western and western Black Sea were also reported during June. This includes reports of Ukrainian naval and air drones and Russian assets patrolling to counter these movements. The Ukrainian military continues to target Russian forces in the south and east of Ukraine including in occupied Crimea.

Although the north-western part of the Black Sea near the Ukrainian and Crimean coasts, including the Sea of Azov and the Kerch Strait, are still assessed as a prohibited area of navigation by the Russian Navy, the Russian Black Sea Fleet's surface vessels have been diminished to a degree that renders it unlikely that they can sustain any patrolling regime which would enable them to control vessels entering Ukrainian waters.



*The number of merchant ships calling Odessa has increased significantly after the announcement of the 'humanitarian corridor' in the Black Sea (Source: Lloyd's List Intelligence / Seasearcher)*

Nevertheless, Russian forces remain capable of striking the Ukrainian Black Sea coast, maintaining the threat towards commercial shipping. Ongoing transits through the 'humanitarian corridor' are based on the continued ability by Ukraine to limit Russian naval superiority in the Black Sea. Russian tactics related to maritime trade in the Black Sea are expected to be limited to ensuring the passage of ships to Russian ports and the Sea of Azov. Attempts to disrupt any scheduled flow of vessels transiting to Ukrainian Black Sea ports are possible, potentially by harassment, GPS signal spoofing or the use of warning shots in extreme cases.

Operational disruptions and threats resulting from military operations are expected to remain until security guarantees are provided for ships transiting the corridor. Such guarantees should address the threat of Russian actions towards vessels trading in Ukrainian Black Sea and Danube ports, as well as threats against ports and port infrastructure. It should therefore be assumed that there remains a generally higher threat towards maritime trade in the north-western Black Sea.

The trilateral agreement between Turkey, Romania and Bulgaria to undertake mine-clearing operations in their respective waters is supposed to begin operations in July. Three mine-hunters and a command vessel will be assigned to the task force. All three countries are already undertaking mine-clearing operations in their waters, but it is expected that the joint effort will provide greater additional and better response clarity.

## Port operations

The likelihood of collateral damage for vessels in port remained unchanged in June. Port infrastructure is still assessed as a likely target for Russian drone and missile attacks. The Ukrainian 'humanitarian corridor' and participating ports are understood to be operational in accordance with the IMO Circular Letter 4748. Local operational differences and issues should be expected. The wider security and military situation in Ukraine continues to be dictated by the war and the overall security situation can change at short notice without prior warning.

The Ukrainian Sea Ports Authority has stated the aim of restoring the domestic port infrastructure to pre-war levels, if not better, during the next two years. Aspects such as coastal air-defences would have to be improved compared with current circumstances to achieve this objective.

Ukrainian Black Sea ports which are not part of the Black Sea corridor are understood to be closed to normal operations. The ports of Odessa, Chornomorsk and Yuzhny all handle vessels which have used the 'humanitarian corridor'. This is likely to continue but operations will be influenced by the general security situation as well as political and diplomatic developments.

Ukrainian Danube ports are operating. However, delays and operational disruptions continued in June, including due to weather conditions. Drifting mines, pilot shortages and disruptions due to Russian attacks remain likely, delays and disruptions cannot be ruled out.

## Summary

Following the G7 meeting in June, a statement underlined the continued support for Ukraine. Agreements on additional funds were also announced. In addition, the European Union announced its 14th sanctions package which included sanctions on Russian LNG shipments. These new sanctions will include the prohibition of using EU ports as part of the transfer of Russian gas from larger to smaller vessels. However, the sanctions do not include a total ban on EU members purchasing Russian gas.

The outcome of the two-day Ukrainian peace conference in Switzerland was a statement supporting Ukraine's territorial integrity and its peace plan as the basis for resolving the conflict

with Russia in the future. Some countries refrained from signing the statement, indicating the difficulties that need to be overcome before any deal can be considered within reach.

While the above events are positive results from Ukraine's diplomatic efforts, the war remains unlikely to be concluded in the foreseeable future. The focus of Russian attacks against Ukrainian civilian infrastructure is likely to continue in July, although intensity and impact of these attacks will be influenced by the timeline of new military supplies to Ukraine.

While it is assessed as less likely under present circumstances, it is unclear to what degree Russia or Ukraine will enforce their threats against civilian vessels transiting to each other's Black Sea ports as potential military targets. If such incidents were to occur, they are most likely to be isolated cases rather than a sustained campaign by either side. Collateral damage remains the most likely threat for merchant ships, and operators should take the possibility of collateral damage into account.

Initial gains made by the Russian forces along the northern contact line appear to have been stalled by Ukrainian forces. Any change in circumstances would likely have a wider impact on the general security situation, including the maritime environment.

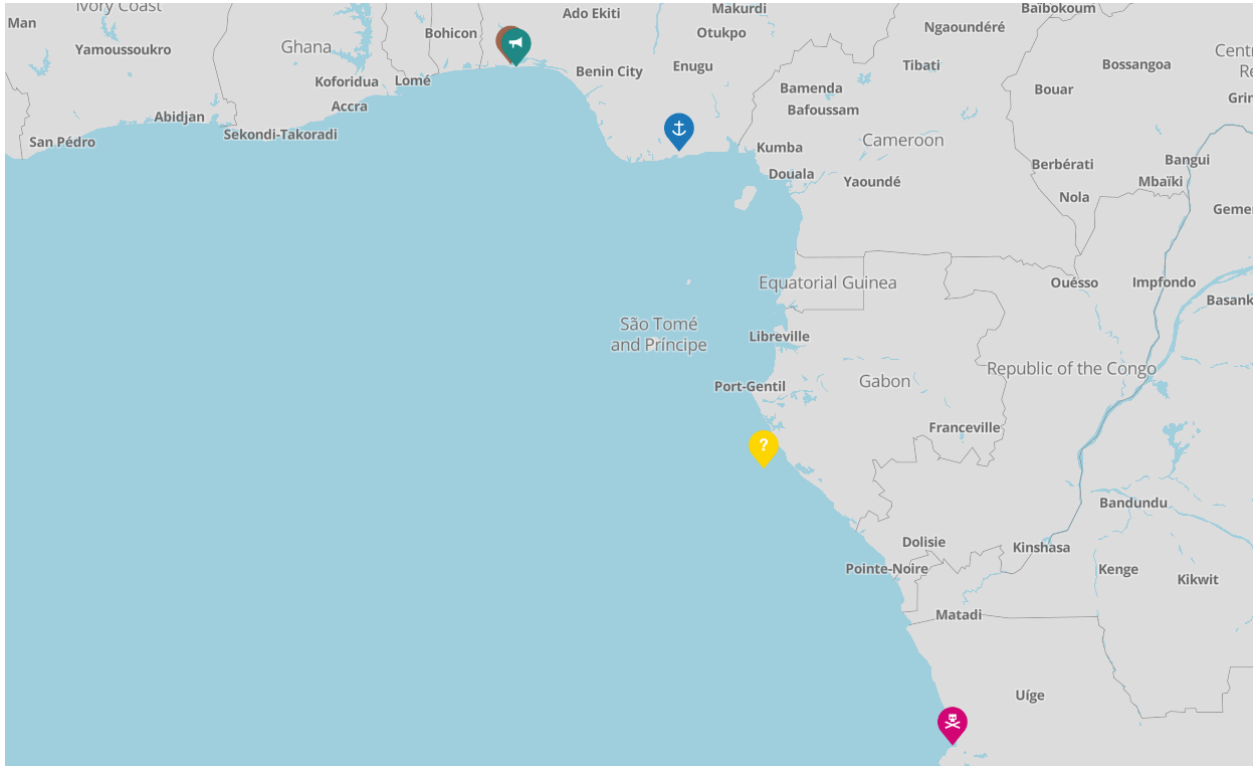
The impact of future Ukrainian and Russian operations should be monitored closely. Risk Intelligence strongly recommends thorough threat and risk assessments prior to any transit and to update contingency plans according to the current situation.

### Further information

Risk Intelligence provides a weekly threat assessment for ports in the northern part of the Black Sea, covering both the operational and security situation. In addition, the report provides a concise overview of the current situation in Ukraine and the northern Black Sea, including constantly updated information regarding the status of exports of grain and other bulk cargoes from Ukrainian ports.

# West Africa

Events included in this report occurred between 1 and 30 June 2024, shown on the map below (Source: Risk Intelligence System).



## Incidents

### **2 June – Nationwide strike in Nigerian ports**

Activism, Ports across the country

### **5 June – Container ship MAERSK VALPARAISO reports suspicious approach**

Suspicious activity, Off Gabon, 09:57 LT (10:57 UTC)

### **13 June – Passenger boat attacked**

Kidnap/ransom, Lagos waterways (Nigeria), 18:00 LT (17:00 UTC)

### **20 June – Container ship MAERSK SARNIA boarded**

Theft, Luanda anchorage (Angola), 03:50 LT (02:50 UTC)

### **26 June – Nigerian Marine Police detains several suspects**

Law enforcement operation, Bonny River, River state (Nigeria)

# Assessment

## Nigeria / Niger Delta

Attackers operating off the southern and eastern Niger Delta remain the most significant potential threat for merchant ships in international trade operating in the Gulf of Guinea. While infrequent high-profile incidents continue to underline the general threat level, few security incidents involving merchant ships have been reported in 2023 and 2024 to date.

Attacks against local vessels in or near the Niger Delta are also a concern, further highlighting the fragile security situation. These are often linked to other illicit activities, mostly to oil-related criminal operations.

Crude oil theft and smuggling of illegally refined oil products have long been important security concerns for the Nigerian government. Such activities generate significant revenues for organised criminal groups across the Niger Delta. Since 2021, profit margins have increased even further, leading to a drop in piracy as criminal groups concentrate on much more profitable oil-related activities. As a consequence, Nigerian crude oil production and export levels remain suppressed. Subsequent budget shortfalls are a major constraint for government efforts to boost growth and development throughout the country.



*Investigation after the destruction of an illegal refinery in the Niger Delta. (Photo: Nigerian military / JTF)*

Security agencies carry out frequent operations to limit oil theft. In June, Nigerian security agencies announced that no less than 165 illegal refining sites were destroyed during a week-long operation in various Niger Delta states. In addition, around 400 incidents of "oil theft and vandalism" were reported. While it is impossible to verify any of these figures, they highlight the scale of the problem and the fact that sustainable improvements will take a long time.

Despite efforts by the military and other security agencies, the overall situation in the Niger Delta remains fragile. For a long time, the Nigerian government has attempted to "pay off" criminal or militant groups in the region through security contracts.

These attempts have not led to long-term success because underlying conditions in the Niger Delta have not improved. Ongoing operations will therefore remain largely window-dressing and are very unlikely to lead to sustainable improvements of the security situation. Maritime operators should closely monitor developments as an uptick in attacks against merchant ships at sea is possible on short notice.

Successful boardings of merchant ships are most likely on "low and slow" types such as small bulk carriers or product tankers, offshore supply ships or fishing vessels. However, other vessels may also be targeted. Weather conditions during the current rainy season make it complicated to operate deep offshore with small boats. Attacks, however, may take place at significant distances from the coastline during spells of good weather even during this period.

For ongoing operations, crew vigilance and measures recommended in *BMP West Africa* remain important to mitigate risks. This may include the use of security escort vessels off Nigeria. These can be offered by dozens of companies which have signed a memorandum of understanding (MoU) with the Nigerian Navy.

The MoU remains the legal basis for additional security measures employed in the Nigerian maritime domain (territorial waters and EEZ). MoU signatories are authorised to provide escort vessels partly manned by naval personnel which cannot operate outside of Nigeria's EEZ.

In addition, it is vital to carefully analyse all security-related incidents. Many cases which are reported as piracy involve ships solely trading within the region. Such incidents are unlikely to be genuine piracy involving random targets. Overall, it is important to recognise piracy as merely one symptom of insecurity at sea which is closely linked to other organised criminal activities.

## Forecast

The threat level in the coming month remains severe off the Niger Delta, despite limited numbers of incidents in recent months. Attacks are possible at distances of up to 250 nm from the coastline, particularly during spells with favourable weather conditions which may occur in the current rainy season which is set to last until about September. All ship types may be targeted.

Inshore attacks against local passenger and cargo vessels or against military detachments remain a threat across the Niger Delta, underlined by various incidents in recent months. Such attacks are not a direct concern for merchant ships in international trade, but crews must be vigilant during river transits in the Niger Delta.

## Gulf of Guinea (Côte d'Ivoire to Gabon) / West Africa (Senegal to Angola)

There were two maritime security incidents reported in June. One incident was a small-scale theft from a container ship off Luanda (Angola), the other incident was initially reported as a suspicious approach of a merchant ship. After analysing further details about this incident, it is very likely that it merely represented normal pattern-of-life activities at sea.

By and large, the trend of few security incidents in the region – which has already been observed in recent months – continued. Moreover, virtually all security incidents that took place in the recent past were low-profile cases which did not result in physical confrontations between crew members and the respective perpetrators.

While the security situation at sea has improved significantly in recent years, limited capabilities of naval and law enforcement agencies as well as a lack of cooperation between these agencies on the national and regional level remain ongoing concerns. These aspects have a negative impact on maritime security, manifested in a range of issues, e.g. illegal fishing and an increasing amount of cocaine smuggling particularly through West Africa.

Limited financial and human resources will remain a concern for maritime security agencies across the region in the coming years. Maritime operators should therefore not interpret a low number of incidents as a significant reduction of the general threat level. Criminal activities at sea remain closely linked. Illicit operations in general have remained stable or even increased in the recent past. Alleged pirate attacks may also be a cover for other types of illicit activities.

### Forecast

Throughout the Gulf of Guinea, the threat of kidnap-for-ransom attacks is assessed as moderate to high for the coming month, depending on the distance from the Niger Delta coastline where perpetrators can protect hostages from security forces and rival gangs during ransom negotiations. The threat level for vessel hijackings is assessed as low.

Across countries in West and Central Africa, perpetrators may try to board berthed or anchored vessels. Around most anchorages, the amount of small boat traffic is virtually impossible to control for security agencies. Threat levels vary between different ports, but perpetrators will generally escape upon discovery.

## Western Indian Ocean

Events included in this report occurred between 1 and 30 June 2024, shown on the map below (Source: Risk Intelligence System).



## Incidents

A complete list of the incidents related to Houthi attacks in the Red Sea and the Gulf of Aden can be found on the Risk Intelligence System as well as in Risk Intelligence's weekly "Security Threat Update: Red Sea/Gulf of Aden".

### **6 June – Bulk carrier PACIFIC HONOR reports suspicious approach**

Suspicious activity, Somali Basin

### **14 June – Fishing vessel boarded**

Armed robbery, Somali Basin

### **23 June – Merchant vessel abandoned after distress call**

Other maritime risk, Gulf of Aden

### **24 June – Container vessel MSC SARA V reports attack**

Insurgency attack, Gulf of Aden



## Assessment

### Southern Red Sea – Gulf of Aden

This area covers shipping routes which are affected by the conflict in Yemen, including operations by Houthi forces to target shipping linked to Israel as well as the US and the UK. There was an increase in activity at the end of May that continued into June as the Houthis announced another phase of their campaign, linked to Israel's assault on Rafah. This included the successful use of a waterborne improvised explosive device (WBIED, a so-called drone boat) to target the bulk carrier TUTOR that resulted in its sinking.



*The TUTOR disabled in the Red Sea with the crew evacuated (Source: French Navy)*

Operations by US forces continued to target missile and drone launch sites on land. Naval operations – particularly off Hudaydah and Saleef in Yemen – were reportedly successful in intercepting missiles and drones as well as drone boats. The Houthis continued to make claims about their operations that have not been supported by evidence, such as a strike against the port of Haifa in Israel. Propaganda about their capabilities is emerging as an important part of the Houthi approach. Their capabilities outside the Red Sea and Gulf of Aden are limited, but within these areas they remain able to target merchant ships.

Looking at all attacks in detail, no strong preference for attacks against ships in the southern part of the Red Sea or the western part of the Gulf of Aden can be identified. There have been more attacks in the Red Sea, with the difference growing in past weeks. However, it should be noted that attacks in the Gulf of Aden only began in January and that further attacks in that area are possible at any time, underlined by recent incidents.

The Houthis appear to be able to identify targets that meet their criteria of links to Israel or the US and UK, but their ability to target them without third-party assistance outside of the Red Sea/Gulf of Aden is limited.

The Houthi strike against the TUTOR was reported to have flooded its engine room, ultimately forcing the crew to abandon it. The ship was struck by a drone boat and video footage showed

the boat approaching the vessel with two dummies on board to give the appearance of being a fishing skiff or similar local traffic.

Another Houthi strike against the Palau-flagged general cargo VERBENA set fire to the vessel and wounded one crew member. The ship was later reported to be sinking and on fire and had been struck again by a Houthi missile following the first strike. Overall, this attack and the TUTOR have been significant in the damage caused and in the use of a drone boat. It might be the case that this is part of a further escalation by the Houthis as part of this phase of their campaign.

US CENTCOM claimed in a social media post that the Iranian frigate JAMARAN was located 8 nautical miles from the VERBENA and did not respond to the distress call. There has been speculation on the role of Iranian naval forces in assisting the Houthis with targeting vessels in the Gulf of Aden in particular.

Since the hijacking of the GALAXY LEADER on 19 November 2023, Houthi forces have continued to target ships in the Red Sea and the Gulf of Aden. In a bid to underline their credentials as a state-level actor, these actions have been based on specific targeting criteria which have been widely communicated.

While some ships were apparently targeted by mistake, often due to outdated information in publicly available databases, the vast majority of attacks has been consistent with previously stated targeting criteria. However, the decrease in maritime traffic through the Bab el Mandeb (see Figure 1) meant that these criteria had to be expanded over time to allow the Houthis to continue their attacks and to bolster public support for their actions which are presented as support for Palestinians in the wake of the conflict in Gaza.

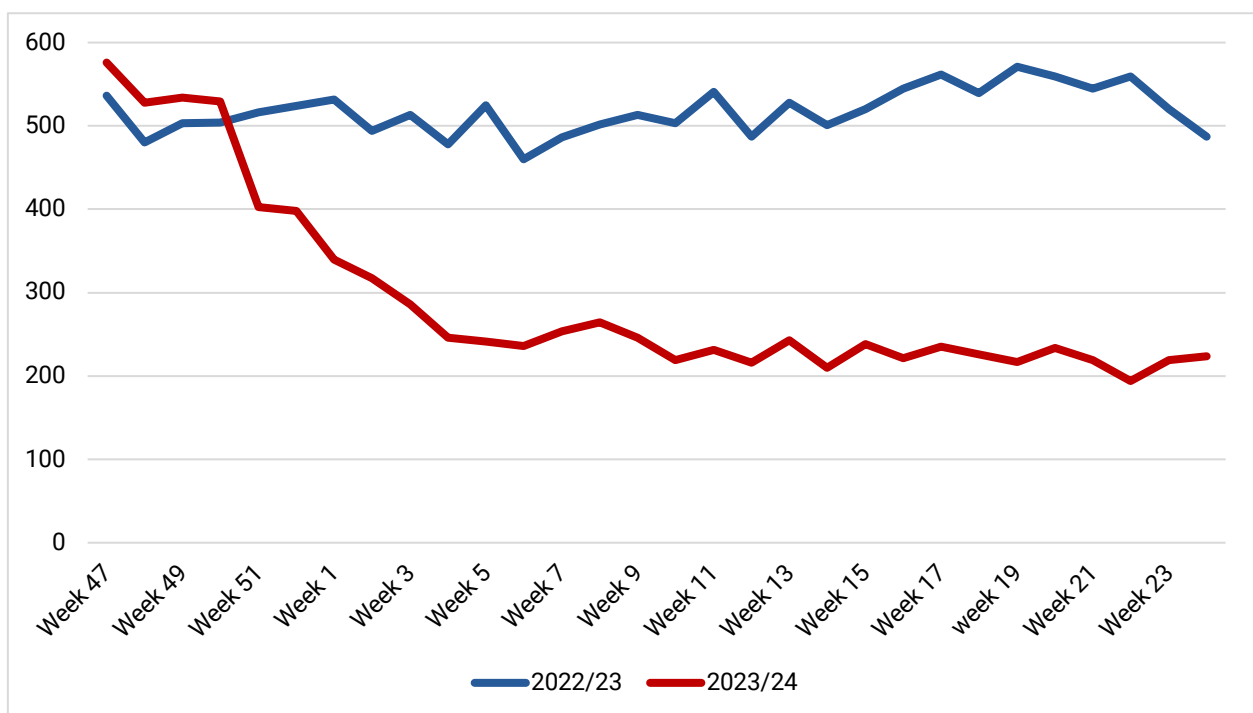


Figure 1: Number of Bab el Mandeb transits by merchant ships per week, including vessels without broadcasting on AIS (Source: Lloyd's List Intelligence/Seasearcher)

In addition to Houthi-related activity, other forces operate in the area as well, notably the Eritrean coastguard which is concerned about boundary disputes with Yemen. Merchant ships diverting to areas close to Eritrean territorial waters are likely to encounter coastguard vessels that might be mistaken for threatening, even if they are engaged in regular constabulary tasks.

## Forecast

The increased naval presence in the area is having some impact. Ongoing attacks, however, highlight the challenge of providing area defence to merchant ships. It is impossible to forecast the duration of current Houthi operations. These are symbolic for the Houthis as part of their public campaign against Israeli operations in Gaza. Additional attacks should be expected at a tempo where the Houthis can continue to pressure Israel and the international community.

To date, the Houthis have not incurred significant costs, particularly in their talks with Saudi Arabia, to deter them from continuing. Military action has likely degraded some capabilities, but the Houthis retain numerous drones which are easier to deploy undetected than anti-ship missiles. The focus is expected to remain on the Red Sea and the Gulf of Aden, where ships can be easily identified and targeted. Claims of attacks in the eastern Mediterranean and Indian Ocean are part of escalating propaganda. The choice of deploying drone boats remains rare with the Houthis very likely aware of the increased threat they pose to ships, given their impact at the waterline.

## Gulf of Oman – Persian Gulf

Following on from no incidents reported in May, there were no significant developments in this area during June and no incidents reported. A wider military confrontation between Iran and Israel has the potential to further destabilise the Middle East. The attack by Iran on Israel in April this year led to significant diplomatic efforts to prevent escalation. Israel conducted limited reprisal strikes, but Iran has been content to see its own attack as the end of this round. The focus has very much shifted to southern Lebanon and whether there will be an escalation between Israel and Hezbollah, Iran having provided support to the latter. Iran has also deployed at least one warship to the Gulf of Aden, although its specific role is unclear.

Iran still has various options for retaliation against Israel, or at least the maintenance of an ongoing low-level campaign. Iran is suspected of involvement in the drone attack on the MSC ORION in the Indian Ocean in April. Of note, the container ship MSC SARAH V reported on 24 June a missile or drone striking the water about 50 metres from the starboard side. This incident took place some 180 nautical miles north of the position of the MSC ORION attack, east of Socotra Island at some distance from the usual zone of Houthi operations.

There is doubt about the ability of the Houthis to launch attacks at these distances from Yemen without assistance. Overall, limited drone attacks against Israel-linked ships or further seizures similar to the MSC ARIES in April are possible.

Iran's government is dealing with an internal crisis: the death of President Raisi in a helicopter crash in May. New presidential elections are taking place shortly, with a final run-off election expected on 5 July. No significant shift in Iran's regional policies following the ascension of a new president to power is expected.

## Forecast

There has been a heightened threat to merchant vessels in the Gulf of Oman and Persian Gulf for some time, due to Iran's targeting of certain ships to make broader political statements. Iran is balancing leadership in 'resistance' to Israeli operations in Gaza with avoiding an escalation in the conflict with Israel. Low-level operations – such as assistance to the Houthi campaign – help to show such leadership. Iran is reluctant to escalate its conflict with Israel. But these low-level operations, as well as support for the Houthi campaign, are a means to continue the pressure.

There is also a threat of vessel boardings and seizures as Iran uses such operations to resolve political and commercial disputes. The frequency of these incidents is difficult to predict but further cases are expected, particularly targeting US-linked ships or ships related to Iran's crude oil trade as well as Israel-linked ships.

## Somali Basin and wider Indian Ocean



*An EUNAVFOR patrol inspects a fishing vessel off Somalia in June 2024 (Source: EUNAVFOR)*

There were no attacks on merchant vessels in this area in June. It is not clear if the approach on the PACIFIC HONOR in the Somali Basin was an aborted boarding attempt or an encounter with local fishing traffic. The closest approach was 400 metres by the skiff and no aggressive

manoeuvres were made. The incident represents the challenge of identifying threats in this area, but also the deterrent effect of armed guards to discourage approaches.

The boarding of a fishing vessel on 14 June, which was a Yemeni-flagged dhow, was more typical of maritime crime affecting this area where fishing vessels are regularly targeted. The 14 crew members called for assistance after being robbed and stranded without any fuel. Naval forces in the area provided support.

IUU fishing continues to be a consideration as coastal communities have continued to express concern over the lack of enforcement in Somali waters and the challenges of administering Somalia's licencing regime for foreign fishing fleets. International naval forces have provided some support but are likely to have only a limited impact.

Criminal groups engaging in piracy still have to balance risk and rewards. The boarding and attempted boarding reported in May were ultimately unsuccessful and naval forces were on the scene relatively quickly in both cases. The initial 'surge' in Somali piracy seen over the past months was likely partly due to perceptions that naval forces were tied up elsewhere in the Gulf of Aden and Red Sea, leaving the Somali Basin unprotected. This proved not to be the case and recent naval operations are likely to be a deterrent to pirate boardings.

## Forecast

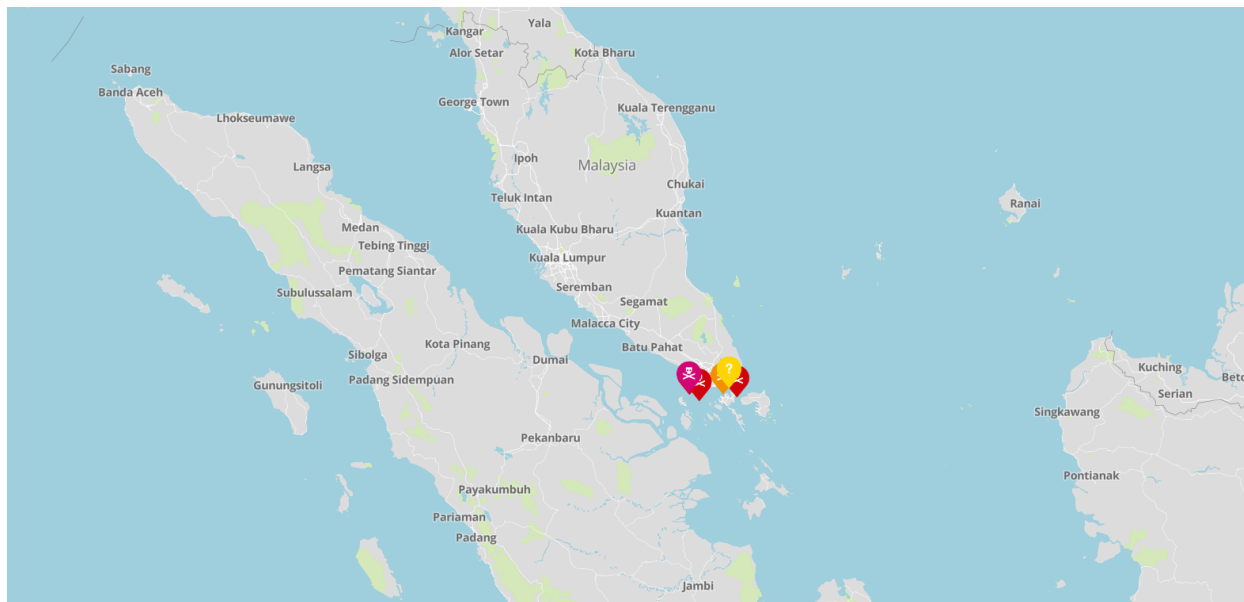
Opportunistic boardings remain possible in this area, even beyond 500 nautical miles from the coast. This threat is still emerging and must be closely monitored. The threat level is assessed to be elevated and attacks are possible in the wider area as criminal groups engaged in piracy seek to repeat the success of the ABDULLAH ransom.

There is a moderate threat to vessels linked to Israel to become targets for attacks. The ability of Houthi forces to target vessels in the wider Indian Ocean is severely constrained but attacks may be possible with Iranian assistance and cannot be ruled out throughout this area.

Proximity to the Somali coast can also lead to encounters with local militias or criminal operations although the threat level is low. Military operations continue in Somalia against militant Islamist group al-Shabab. There is only a limited maritime dimension to this conflict which is not expected to affect merchant ships over the next month.

## South East Asia

Events included in this report occurred between 1 and 30 June 2024, shown on the map below (Source: Risk Intelligence System).



## Incidents

### **5 June – Offshore supply vessel AVATAR COURAGE boarded**

Failed robbery, Batu Ampar anchorage (Indonesia), 00:40 LT (16:40 UTC on 4 June)

### **11 June – Bulk carrier SANTA REGINA boarded**

Armed robbery, Singapore Strait TSS, 04:30 LT (20:30 UTC on 10 June)

### **11 June – Bulk carrier G.B. CORRADO boarded**

Armed robbery, 15 nm west of Pulau Cula (Indonesia), 04:35 LT (20:35 UTC on 10 June)

### **15 June – Bulk carrier IVESTOS 9 boarded**

Armed robbery, Singapore Strait TSS, 02:01 LT (18:01 UTC on 14 June)

### **15 June – Chemical tanker reports suspicious activity**

Suspicious incident, Singapore Strait TSS, 20:12 LT (12:12 UTC)

### **25 June – Heavy lift vessel DONGBANG GIANT NO. 6 boarded**

Armed robbery, Tanjunguban anchorage (Indonesia), 03:29 LT (20:29 UTC on 24 June)

### **27 June – Bulk carrier IVESTOS 9 boarded**

Theft, Singapore Strait TSS, 03:10 LT (19:10 UTC on 26 June)

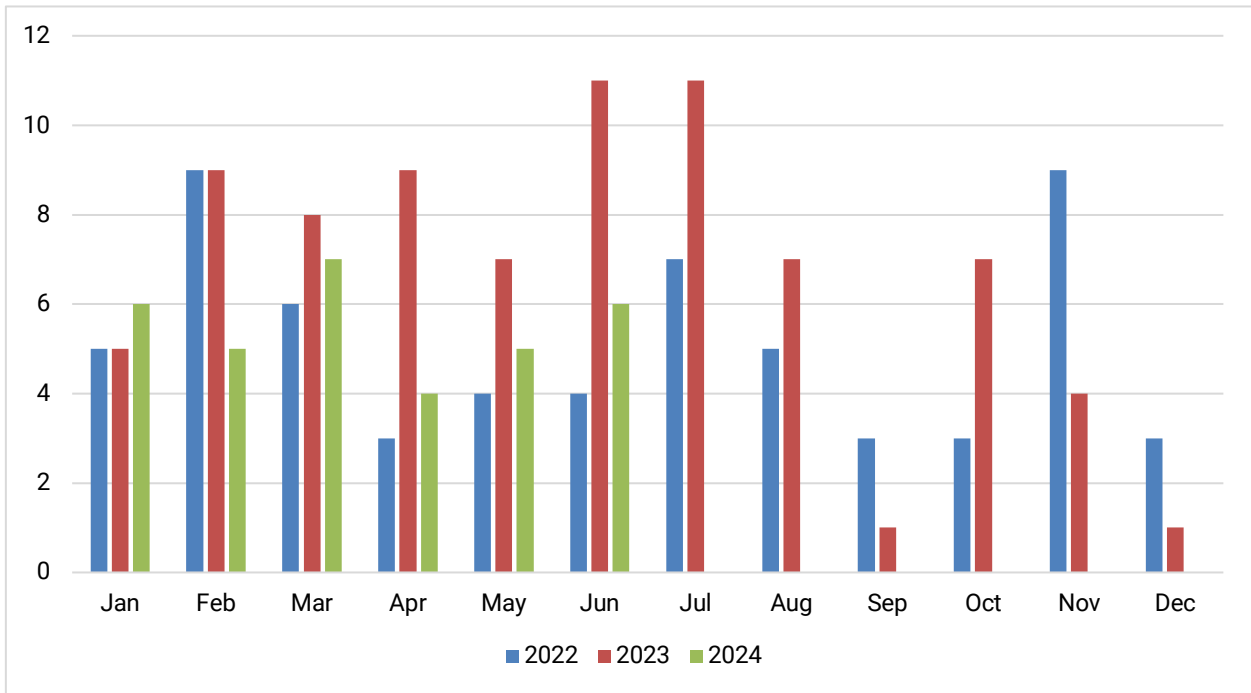
# Assessment

## Straits of Malacca and Singapore, South China Sea, Indonesian archipelago, Sulu / Celebes Seas

Boardings in the form of thefts and armed robberies remain the prevalent threat for merchant ships within these areas. Seven incidents were recorded in South East Asia in June, all of which took place within the Singapore Strait.

While bulk carriers underway in the Singapore Strait continue to be the most vulnerable vessel type in South East Asia, the activity during June also illustrates that thieves and armed robbers remain skilled at boarding all types of vessels. Stationary craft with low freeboard are particularly vulnerable at Indonesian anchorage areas, as two incidents involving an OSV and a heavy lift vessel illustrated.

A rare suspicious incident was recorded in June, involving a small craft that reportedly was flashing lights towards an approaching chemical tanker transiting the Singapore Strait. This behaviour is not typical of perpetrators in the area and is more likely to involve attempts by fishermen seeking to protect their lines or nets.



*Number of maritime security incidents in the Straits of Malacca and Singapore per month in 2022, 2023 and 2024 to date (Source: Risk Intelligence System)*

Over the past 12 months, 53% percent of reported incidents in the region have taken place in the Singapore Strait. Of these, also 53% involved perpetrators reported as armed. Most perpetrators are likely carrying knives, even though weapons may not be observed during incidents. As the borders of Indonesia, Malaysia and Singapore intersect in the Singapore Strait, perpetrators appear to take advantage of jurisdictional challenges, improving their ability to escape.

During the past twelve months there have been 64 incidents in the SOMS. Of these, 45 occurred in the Singapore Strait and 19 in the Malacca Strait. Of the total, 38 involved bulk carriers, 13 involved tankers, while 6 involved barges and other craft in tow. The outliers involved general cargo vessels, heavy lift vessels, OSVs, and a rig. No incidents in the straits have involved container ships or passenger vessels.

Overall, during this period 67% of all SOMS incidents targeted ships underway, all but two in the Singapore Strait. During the past twelve months, 80% of the Singapore Strait incidents have taken place in the western zone between Karimun and Batam. As coastal authorities have increased patrols, response times are generally quick when incidents are reported. While most perpetrators are armed with knives or machetes, they will rarely attack the crew unless provoked. For the wider region, incidents typically encountered are boardings at anchorages and while alongside.

Incidents in 2022 and 2021 involving locally trading ships illustrated the vulnerability for smaller local vessels to hijackings for cargo theft. Larger and internationally trading tankers have not been targeted by hijackers in recent years. These incidents, together with the illegal sale of fuel from tugs and regular related law enforcement interventions in the region, further illustrate that black market trading of fuel at sea continues.

Armed robbers and thieves usually board vessels at night and target supplies, equipment and engine spares while avoiding crew. Areas with the highest frequency of criminal activity during the past twelve months include the Singapore Strait, the ports of Batangas, Belawan, Dumai, Manila, Sandakan and Tanjung Priok. Boardings of vessels alongside are less frequent.

Aside from the Singapore Strait, boardings of vessels underway have also occurred in the Malacca Strait, the Natuna Sea and the southern South China Sea, although at a significantly lower frequency. Most incidents in the region involve bulk carriers and tankers, with very few involving container vessels. Boardings of oil rigs are infrequent and generally involve the theft of equipment and supplies.

Moreover, some incidents during the past 12 months illustrate that crew members may be injured during attacks. In addition to a stabbing in October 2023, there have also been incidents in which seafarers have suffered head injuries. In July 2022, perpetrators tied up and threatened a seafarer at gunpoint while stealing engine spares.

The March 2023 hijacking of a tug during which palm seed batches were stolen from the barge in tow and a similar incident off Sulawesi in January are the only confirmed hijackings for cargo theft in the region since 2017. In 2018, there was one failed incident which had the markings of a product theft attempt involving the LEE BO off Mersing, Malaysia in the South China Sea.

The arrests of gang leaders behind hijackings had effectively suppressed such crimes, despite occasional incidents involving small tankers and barges which are locally owned, managed and trading solely in the region. As fuel subsidies in the region are being withdrawn, resultant price increases could serve as drivers for sustained or increasing illegal fuel smuggling and sales in the South China Sea, Sulu/Celebes Seas and the SOMS. In turn, this increases the vulnerability of smaller tankers to potential hijackings, similar to the period from 2011 to 2017.



As a result of intensified military operations in the southern Philippines and eastern Malaysia, kidnap for ransom activity of the Abu Sayyaf Group (ASG) and its affiliates has been significantly suppressed. No cargo vessels have been targeted in the Sulu/Celebes Seas since a failed attack in 2018. Kidnappings of crew from tugs and fishing trawlers have not succeeded since 2020.

## Forecast

In the coming month, the threat of boardings of vessels that are underway or anchored for the purposes of theft or armed robbery is moderate. Higher threat locations include the Singapore Strait and anchorages at Batangas, Belawan, Dumai, Manila, Sandakan and Tanjung Priok. Lower threat levels are present in the southern South China Sea off the Malaysian peninsula, and the Natuna Sea off Pulau Mapur, Indonesia.

The threat of hijacking for product theft is moderate for locally trading small tankers. Hijackings in the region are infrequent due to effective law enforcement. The threat that internationally-trading tankers will be hijacked for cargo theft is assessed as low.

The threat of kidnappings of crew from merchant ships in the Sulu and Celebes Seas is low, particularly within the designated transit corridors. Fishing trawlers remain the most vulnerable craft with respect to ASG-related kidnapping operations, although other small craft, tugs, ferries and locally-trading vessels may also be vulnerable.

## Definitions

### Threat levels

The threat levels used in this report are as per the Risk Intelligence System and are assessed based on the likelihood and consequence of a particular threat type occurring. The threat levels are as follows:

- Low: Negligible impact on operations in the coming month due to the unlikely occurrence of threat-related activity.
- Moderate: Some potential for minimal impact on operations in the coming month due to occurrence of low- level threat-related activity.
- Elevated: Moderate impact on operations in the coming month is possible with some threat-related activity expected to occur.
- High: Potential for major impact on operations in the coming month due to the occurrence of significant threat- related activity.
- Severe: Potential for severe impact on operations in the coming month as significant threat-related activity is ongoing or expected to occur.

### Incident types

The report covers the threats of piracy and armed robbery at sea in various forms but does not include other threats to merchant vessel operations such as stowaways or smuggling. All possible contingencies cannot be covered by any assessment and this report only includes an assessment of the threat for merchant vessels in general and not specific vessel types.

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