



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: Ongoing crisis in the Red Sea

Background

The overall number of attacks against merchant ships in the Red Sea and the Gulf of Aden has been relatively low in recent weeks. At the same time, the amount of maritime traffic through the area is significantly below the "normal" volume but has been relatively constant since late January. Houthi forces continue to target individual vessels, generally based on the respective owners also being engaged in trade with Israel.

The threat was once again underlined by the attacks against the crude oil tanker SOUNION in August. After the ship had to be abandoned by the crew, explosive charges were apparently placed on the anchored tanker. Subsequent explosions – shown in a Houthi propaganda video – caused a significant fire on the fully-laden ship.



Fires on the crude oil tanker SOUNION (Photo: EUNAVFOR)

Without significant changes in the broader political environment, the threat of Houthi attacks against commercial shipping is very likely to persist. Ship transits through the Bab el Mandeb are therefore likely to remain at the current level at least over the coming weeks.

Maritime traffic patterns

The number of merchant vessels passing through the Bab el Mandeb has declined considerably due to Houthi attacks which started in November 2023. In December, most large container lines began to re-route ships around the Cape of Good Hope.

Figure 1 on the next page shows that the announcement was followed by a sharp and immediate drop in container ships passing the Bab el Mandeb (visible in week 51). Container traffic in the Red Sea and the Gulf of Aden has not stopped completely, yet the vast majority vessels which are still operating in this area are relatively small and mostly trading within the region.

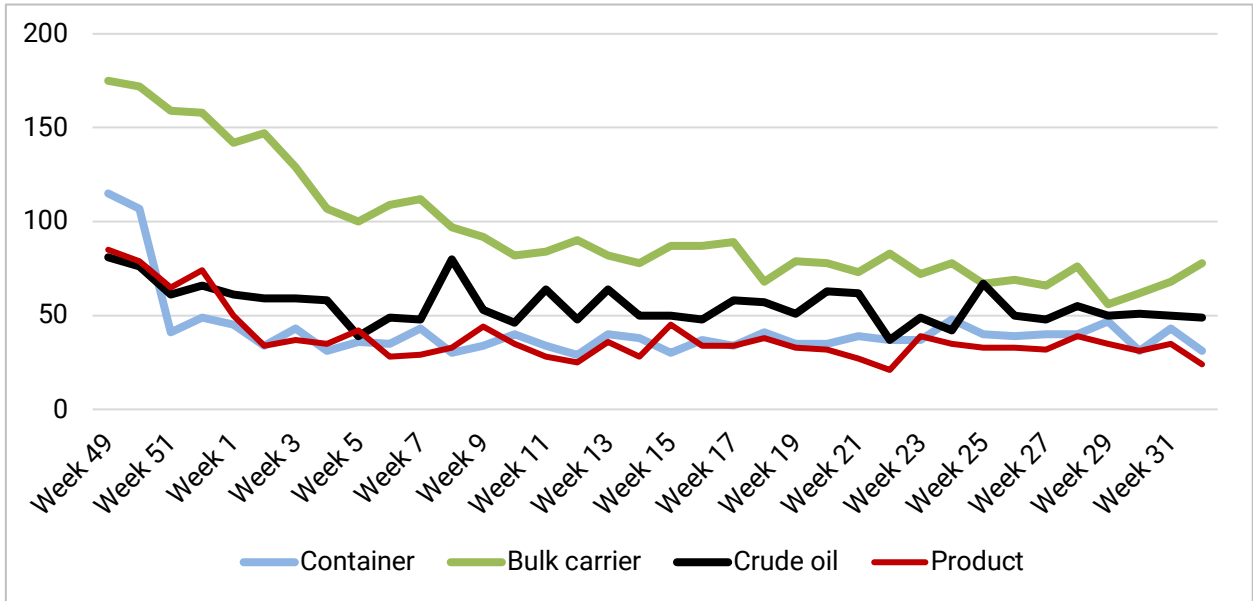


Figure 1: Weekly Bab el Mandeb passings by ship type (Source: Seasearcher / Lloyd's List Intelligence)

The decline for other ship types was more gradual, likely because the container market is heavily concentrated. Other sectors, notably the bulk carrier and tanker markets, are much more diversified. Many different companies therefore have to consider the risk levels to their own ships before deciding whether or not to transit through the Red Sea.

So far, military operations have not led to a recovery in maritime traffic levels. Instead, traffic figures have been relatively stable since mid-January at between 40 to 50 percent of Bab el Mandeb transits compared to the same period during the previous year (see Figure 2).

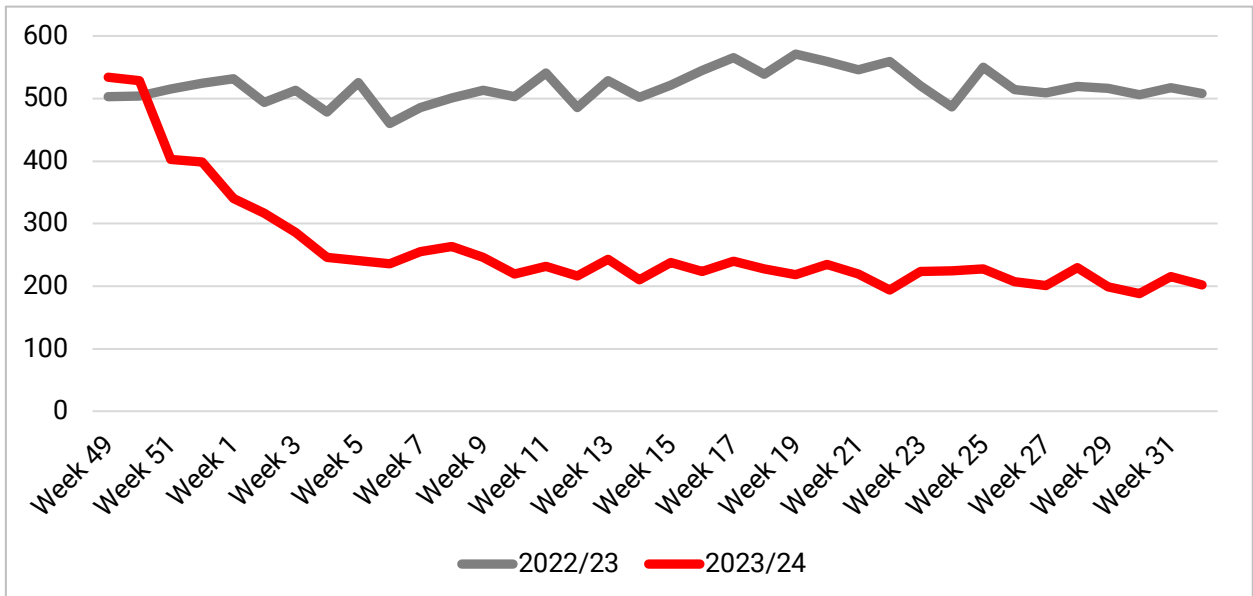


Figure 2: Weekly Bab el Mandeb passings by merchant ships >10,000 dwt (Source: Seasearcher / Lloyd's List Intelligence)

The fact that there have been virtually no changes to current traffic levels since January underlines that operators of commercial vessels remain hesitant about a full return to the Red Sea. It is very unlikely that military operations can change the real – or even the perceived – risk to individual ships.

In this context, it is interesting that the EU-led Operation Aspides has been hailed as a major success. In August, EU representatives stated that 300 merchant vessels had been escorted since the beginning of the operation. However, that amounts to less than two ships per day, compared with the 30 to 40 ships transiting the Bab el Mandeb per day even at the current level of traffic. No similar statistics have been provided for Operation Prosperity Guardian, but the numbers are very likely to be even lower.

Moreover, naval forces have recommended that ship operators should consider Red Sea transits with AIS switched off. EU naval forces have tried to underline this recommendation with an alarming statistic: “Around 80% of vessels that have been hit had AIS .”

Whether this is really useful advice is at least questionable. Despite naval recommendations, more than 90 percent of merchant ships are transiting the Bab el Mandeb with AIS switched on. The situation has not changed significantly over time either, shown in Figure 3.

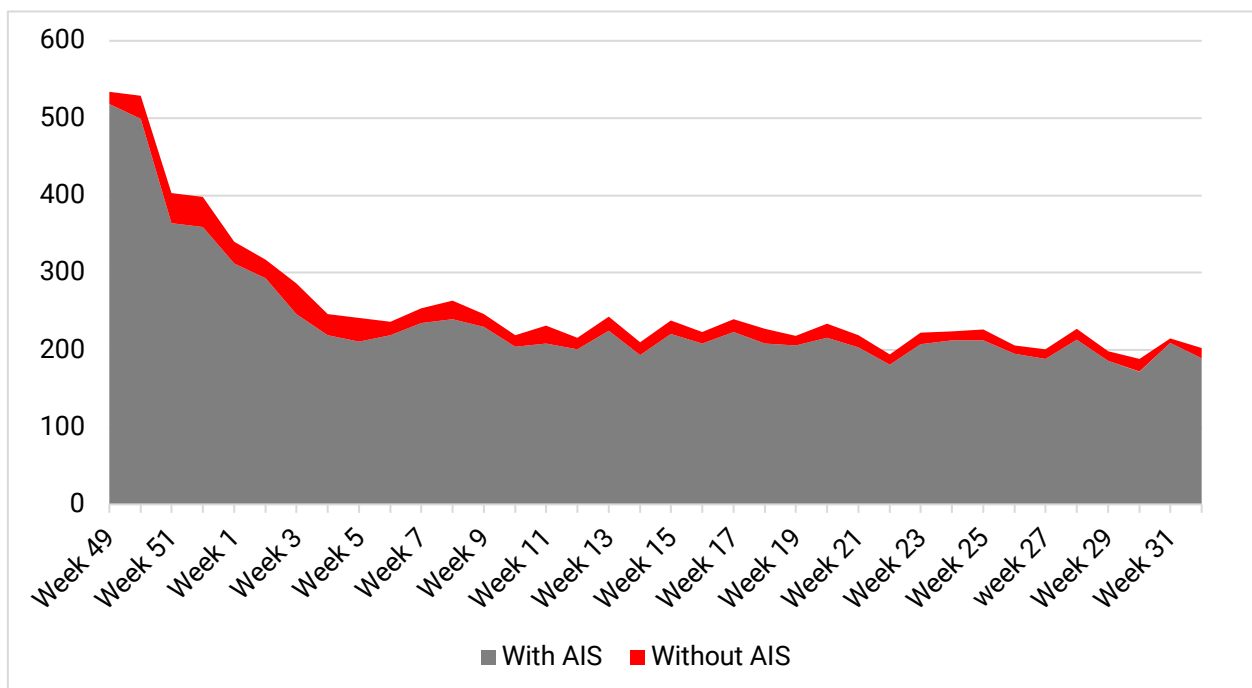


Figure 3: Number of Bab el Mandeb transits by merchant ships per week with and without AIS (Source: Lloyd’s List Intelligence/Seasearcher)

Houthi forces are very likely using other methods to track and identify their targets. This has been underlined by the successful attacks which have been carried out against merchant ships transiting the area without broadcasting AIS.

Political considerations

In combination with the broader regional context, political decision-makers were left with a dilemma. Should there be a military response against the Houthis? Should military operations be purely defensive? Would strikes against the Houthis lead to an escalation across the Middle East?

There is still no definitive agreement about the answers to these and related questions. The US government launched Operation Prosperity Guardian already in December with a defensive mandate. Despite its multinational character, countries like Egypt or Saudi Arabia were unwilling to contribute. Several European countries also decided against participating and ultimately agreed on the EU-led Operation Aspides, launched in February and also with a defensive focus.

Meanwhile, US and UK forces have conducted military strikes against the Houthis since January. Offensive actions, however, are part of a separate operation (Poseidon Archer). This separation is purely political as direct strikes are not supported by all countries participating in Prosperity Guardian.

Since the beginning of the Houthi campaign, the US and several other governments have frequently stated that the attacks against merchant ships have been “indiscriminate.” Houthi forces, on the other hand, have publicly stated their targeting parameters and largely stuck to these announcements. Overall, the threat level for merchant ships is now closely linked to individual characteristics while all ship operators have to take the potential for collateral damage into account.

It should also be noted that the presence of naval assets is not particularly well coordinated. With MSCHOA and UKMTO, two reporting centres are responsible for the same region. Neither centre has a full picture which includes all attacks or attempted attacks by Houthi forces since November. In addition, neither UKMTO nor MSCHOA even acknowledge the presence of another reporting centre in their communications.

Summary

Military operations to counter the threat posed by Houthi attacks have been tactically focused on day-to-day operations rather than aimed at affecting the longer-term outlook. The number of ships which have been escorted has been highlighted as a success, yet it is very likely that many of these ships would have transited the area anyway.

More importantly, Houthi forces have firmly established the threat and can continue their campaign without incurring significant costs. Military strikes against Houthi assets can degrade some of their capabilities. However, these strikes have clearly not been an effective deterrent to the Houthi campaign.

Warships may be reassuring to seafarers, yet they are unable to intercept every incoming missile or drone. More importantly, the current level of naval operations is not sustainable in the long term. Other solutions to address the threat are therefore needed.

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.

Update: Maritime dimensions of the war in Ukraine

Situation on land

There were only eight maritime-related incidents reported during August, compared with 14 in July. At the same time, Russian attacks on Ukrainian civilian infrastructure intensified throughout the month. Ukrainian forces also targeted the Russian energy sector with attacks on oil refineries and started an incursion into Russia in early August. Ukrainian attacks were also reported targeting Crimea and the Russian Kerch area.

The focus of Russian attacks on Ukraine's energy sector has further stressed the stability of power supplies. Scheduled brownouts and blackouts were reported across Ukraine during August, local scheduled power-outages are to be expected to continue. Implications for port operations are likely to differ, but some impact is likely to occur in September.

The ability for Russia to continue attacks on Ukrainian energy infrastructure will depend on Ukrainian capabilities to protect these facilities. With the Ukrainian incursion into Russia the contact line has been changed. However, the operation has not yet had a significant impact on the war. In other areas along the contact line, fighting with Russian forces has intensified. The Russian military made further advances in the Donetsk region, although not to a degree that is significant enough to change the overall dynamics of the war.

India's prime minister, Narendra Modi, visited Kyiv and President Zelenskiy in August for the first time since the Russian invasion of Ukraine. Modi also visited Moscow in July and urged both countries to seek peace through dialogue and diplomacy.

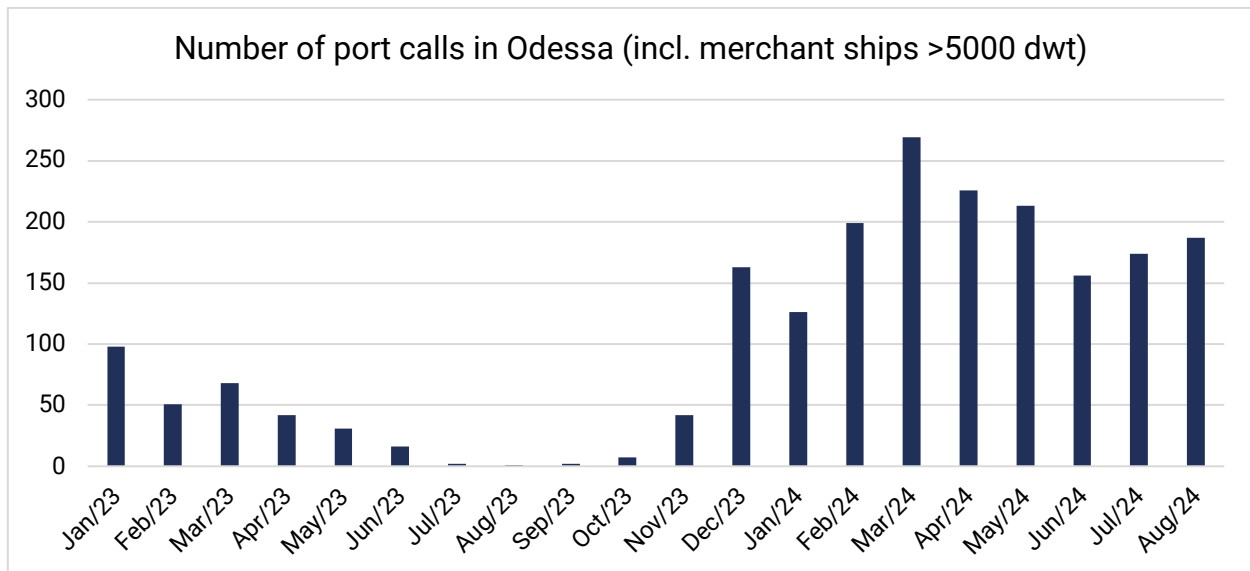


Ukrainian President Volodymyr Zelenskyy with Indian prime minister Narendra Modi during their consultations in Kyiv in August (Photo: Ukrainian Presidential Office)

Ukraine's President Zelenskiy also stated that he would present objectives for a Ukrainian victory plan to US president Joe Biden and both presidential candidates Harris and Trump. These talks are planned as part of an upcoming United Nations General Assembly visit in September.

Black Sea

Throughout August, 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. The general threat level for vessels transiting the corridor is assessed as less compared to in port, reflecting that transits are relatively stable and secure.



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)

Attacks on Ukrainian civilian infrastructure, particularly the electricity grid, continued in August. They have impacted port operations to varying degrees. Similar disruptions cannot be ruled out in the coming months. The general threat from military operations remains high.

Ukrainian forces attacked the Russian Kavkaz port again on 22 August, reportedly targeting a ferry carrying fuel tanks. The previous attack in July also targeted a ferry. Shipments across the Kerch Strait are important for Russia to resupply forces on Crimea. Two days later, Russian forces targeted a Ukrainian offshore facility in the Black Sea. However, the attacks during August do not indicate a change in the tactics or a change in the overall threat picture for the area.

Russian forces remain capable of striking the Ukrainian Black Sea and Danube coast, maintaining the threat towards commercial shipping. Ongoing transits through the 'humanitarian corridor' are assessed as possible, 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, spoofing of navigational systems 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.

Port operations

The likelihood of collateral damage for vessels in port remained unchanged. Port infrastructure is still a likely target for Russian drone and missile attacks. The Ukrainian 'humanitarian corridor' and participating ports are understood to be operational in accordance with IMO Circular Letter 4748. Local operational differences and issues should be expected. Ukrainian ports which are not part of the Black Sea corridor are still closed to normal operations. Maritime operations will be influenced by the general security situation as well as political and diplomatic developments.

Reported attacks in August did not lead to major disruptions to port operations. However, delays and operational disruptions should be expected, including due to ongoing issues with drifting mines and disruptions due to Russian attacks on Ukrainian civilian energy infrastructure.

Summary

Although the Ukrainian incursion into Russia's Kursk region is notable, it does not present a significant change to the overall dynamics. Talks between India and Ukraine are positive results from Ukraine's diplomatic efforts as India is perceived as an actor with influence on Russia. Nevertheless, 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 September. Any large-scale offensive is not likely given current capabilities on both sides. For Ukraine, all efforts are influenced by the timeline of new military supplies promised by its partners.

It is currently unlikely that either 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, operators should therefore take the possibility of collateral damage into account.

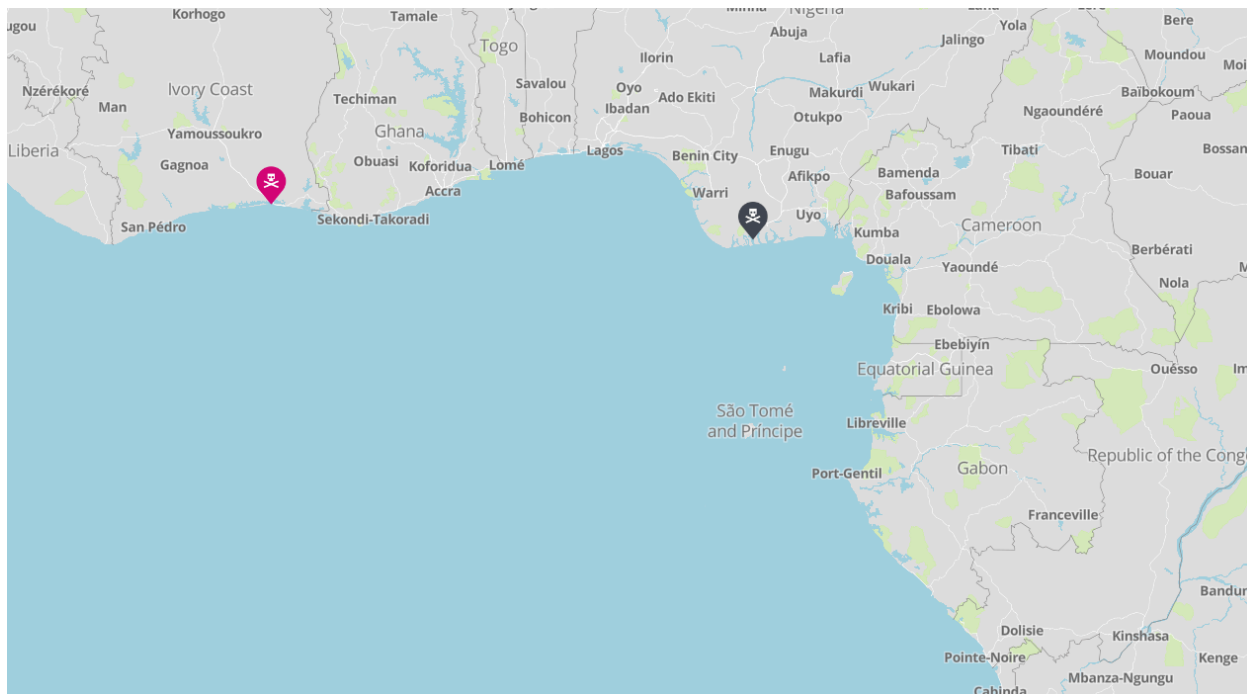
The impact of future Ukrainian and Russian operations should be monitored closely. Risk Intelligence strongly recommends thorough threat and risk assessments prior to any transit and to update contingency plans according to the current situation.

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 31 August 2024, shown on the map below (Source: Risk Intelligence System).



Incidents

13 August – Offshore supply vessel BOURBON LIBERT 320 boarded

Theft, Abidjan anchorage (Côte d'Ivoire), 01:15 LT/UTC

28 August – Passenger boat taken and passengers robbed

Hijacking, Rivers 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. Few piracy-related incidents have been reported in 2023 and 2024 to date. Infrequent high-profile incidents nevertheless underline that the threat has not been completely eradicated.

Attacks against local vessels in or near the Niger Delta are also a concern, highlighting the fragile security situation in this part of Nigeria. These attacks are often linked to other illicit activities,

mostly to oil-related crimes, or to conflicts between oil companies and local communities. Several incidents in recent months showed this particular threat.

On a broader level, crude oil theft and smuggling of illegally refined oil products have long been important concerns for the Nigerian government. Such activities generate significant revenues for organised criminal groups across the Niger Delta. In recent years, profit margins have skyrocketed, leading to a drop in piracy as criminal groups concentrate on much more profitable oil-related illicit activities. As a consequence, Nigerian crude oil production and export levels remain suppressed. Subsequent budget shortfalls limit government efforts to boost growth and development in the Niger Delta as well as in other parts of the country.



Military personnel dismantle an illegal refinery site. (Photo: Nigerian Ministry of Defence)

Security agencies carry out frequent operations to limit oil theft. In August, Nigerian security agencies once again announced the destruction of dozens of illegal refining sites in several Niger Delta states. These efforts are part of Operation Delta Sanity which had been launched in January. Similar military operations have been carried out in recent years, yet these have not led to sustainable improvements.

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

Such attempts have not led to sustainable improvements because underlying economic conditions have not been addressed. Initiatives to combat crude oil theft and illegal refining will therefore remain largely window-dressing, although short-term improvements of the security situation are possible. 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 high off the Niger Delta, despite limited numbers of incidents in recent months. Pirate 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 end this month. 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 was only one maritime security incident reported in August. Several men boarded an offshore supply vessel tanker at Abidjan's inner anchorage in Côte d'Ivoire. No violence against crew members, however, was reported as the perpetrators escaped when they were discovered.

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.

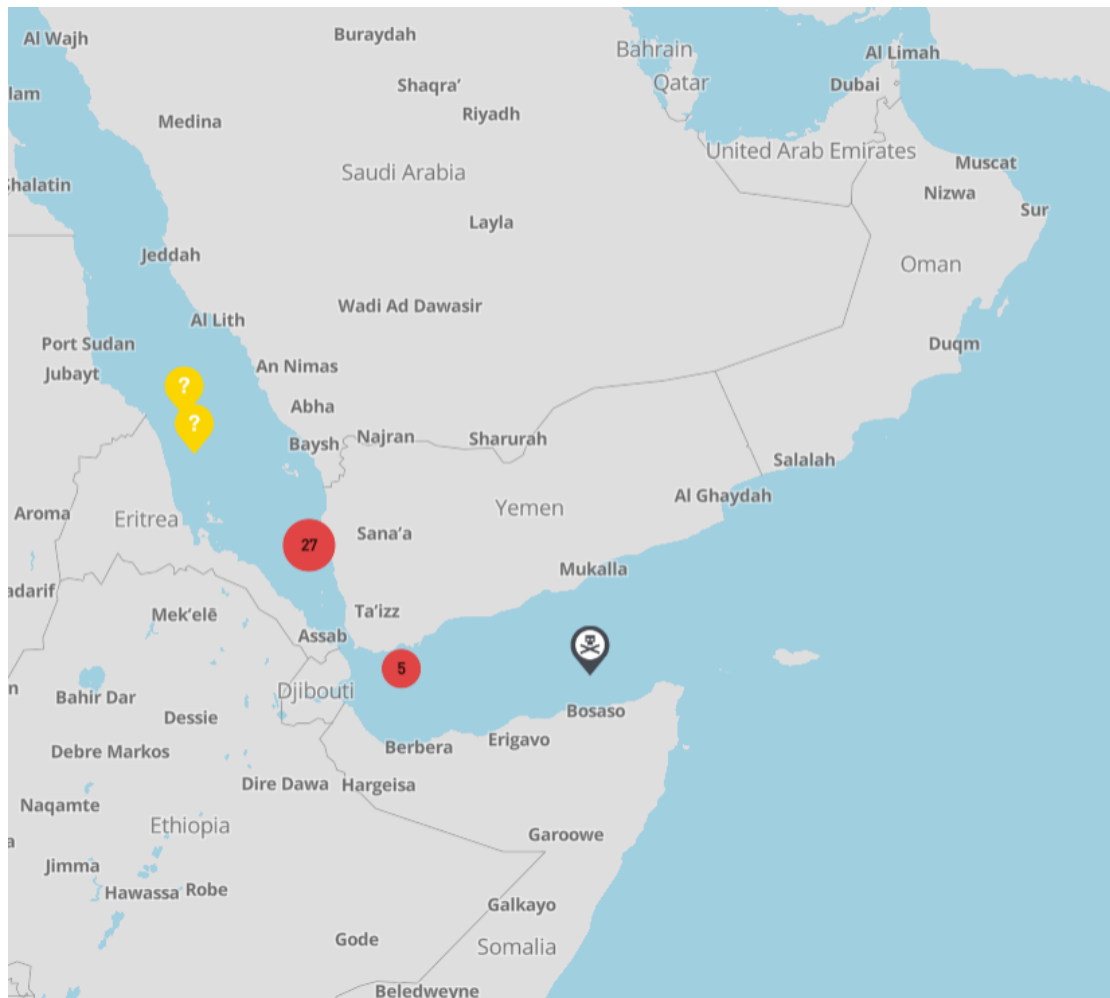
Forecast

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 31 August 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".

15 August – Vessel SIAM observes small craft with armed men

Suspicious activity, southern Red Sea

15 August – Vessel SUNNY OCEAN reports suspicious approach

Suspicious activity, southern Red Sea

25 August – Possible pirate group reported

Hijacking at sea, Gulf of Aden

Assessment

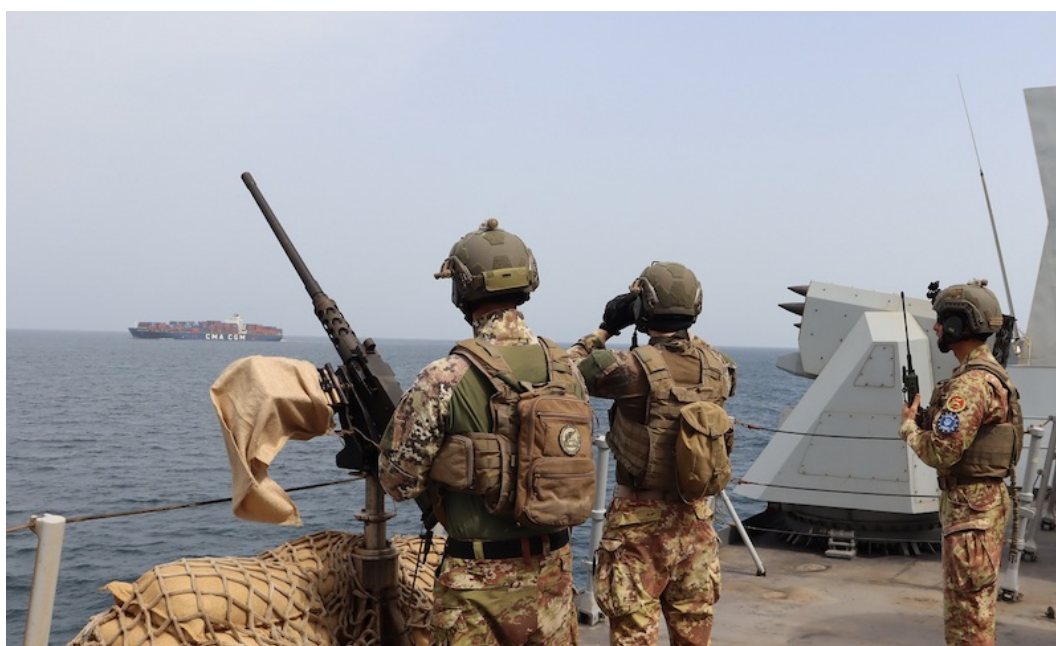
Southern Red Sea – Gulf of Aden

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. The impact of these ongoing operations on commercial traffic in the area is this month's feature article.

Houthi attacks continued in August, at a relatively low-level but also with individual vessels being targeted multiple times. The tanker DELTA BLUE was targeted in three separate attacks as it moved from south to north through the southern Red Sea.

The severity of the attacks remains a concern. The crude oil tanker SOUNION was attacked on 21 August after being hailed by about 15 persons in two skiffs during a northbound voyage. After a brief exchange of fire, likely with an on-board armed team, the distance to the small craft increased.

The master then reported to UKMTO that the vessel was subsequently hit by three projectiles. There was a fire on board and the ship lost engine power. The crew had to be evacuated by naval forces and the vessel drifted with fires on board – with the potential for oil to spill and a salvage operation currently uncertain.



Operation Aspides forces provide an escort in the southern Red Sea (Source: EUNAVFOR)

Overall, a potential return to normal in the Red Sea is unlikely in the medium term as the Houthis continue their strikes, albeit at a lower tempo than previously. An emerging pattern of fewer vessels being targeted more aggressively is emerging, yet this may also be due to the Houthis struggling to find vessels fitting with their stated targeting parameters.

In addition to Houthi-related activity, other forces operate in the area as well, notably the Eritrean coastguard. 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. There were two suspicious incidents reported in August that were likely to have been such encounters, including one where armed guards fired warning shots at vessels that subsequently identified themselves over VHF as Eritrean coastguard.

Forecast

Naval presence in the area is having some impact. Ongoing attacks, however, highlight the challenge of protecting merchant ships. It is impossible to forecast the duration of current Houthi operations and the number of expected attacks. 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. The threat level is expected to remain severe for vessels linked to Israel, the US, and the UK, and elevated for all other transits.

Military action has likely degraded some Houthi 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.

Gulf of Oman – Persian Gulf

There were no significant incidents in this area during August, which has continued the trend of no significant maritime incidents in recent months.

Iran has mostly remained content to provide support to Houthi operations, rather than high-risk direct operations against Israel, and this support has been ongoing. There has been a shift in focus onto Iran's support for Hezbollah in southern Lebanon, given the group's limited rocket strikes against Israel at the end of August. Both Hezbollah and Iran are presently keen to avoid escalation and have kept their responses to a minimum following the assassinations by Israel of senior Hezbollah and Hamas commanders in Beirut and Tehran respectively in July.

High-level political debates are taking place in Iran's government over the appropriate retaliation against Israel and how this should be carried out in the context of Iran's wider regional foreign policy goals. The faction calling for restraint reportedly sees this as an opportunity to secure concessions from the United States for a more conciliatory approach. However, there are also factions wanting more aggressive action.

At the maritime level, Iran has various options for retaliation against Israel, or at least the maintenance of an ongoing low-level campaign that can include maritime options. It is likely that

Iran can dial up or down its support for Houthi operations, particularly the assistance that it might provide for targeting vessels in eastern areas of the Gulf of Aden and into the Indian Ocean.

Iran is suspected of involvement in the drone attack on the MSC ORION in the Indian Ocean in April and possibly the MSC SARAH V in June and the MAERSK SENTOSA in July. These attacks took place at significant distances from the usual zone of Houthi operations.

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 has a number of asymmetric options to continue to pressure Israel, including in the maritime domain.

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 Operation Atalanta boarding team approaches a dhow in August 2024 (Photo: EUNAVFOR)

EUNAVFOR issued a warning about a pirate group launching from Bosaso in the last week of August. At the time of writing, there was no additional information to confirm a possible area of operations and no attacks had been reported. There was a suspicious approach reported in the

eastern Gulf of Aden by the tanker VELA; ladders were reportedly sighted, but no guns, and the distance of closest approach was not noted. This area of operations would be uncommon for Somali pirates, which have favoured areas of the Somali Basin for attacks in recent months.

After the initial surge in pirate activity at the end of 2023, the role of naval deterrence is likely to still be a crucial consideration by criminal groups assessing whether boarding and hijacking merchant ships will be successful. The most recent incidents were a dhow boarding and a suspicious approach on the bulker PACIFIC HONOR with both incidents taking place in June.

A Turkish naval deployment has been confirmed in media reporting following the Turkey-Somalia defence pact announced in February. Turkish naval forces will deploy to deter piracy and “other maritime security challenges”, according to official statements. It has also been announced that training will be provided to Somalia’s military and law enforcement forces. Any deployments will also likely be linked to offshore developments that Somalia is prioritising.

In August, Somalia announced a defence agreement with Egypt. This agreement is part of Somalia’s intentions to become more self-sufficient in its fight against al-Shabab, without needing the support of African Union forces. But it is also motivated by the internal politics of the federal Somali government needing support to counter the growing relationship between the province of Somaliland and Ethiopia. Reporting did not specifically note a maritime component to the Somali-Egypt agreement, with official statements focusing on broad “security cooperation” and “countering terrorism”.

Forecast

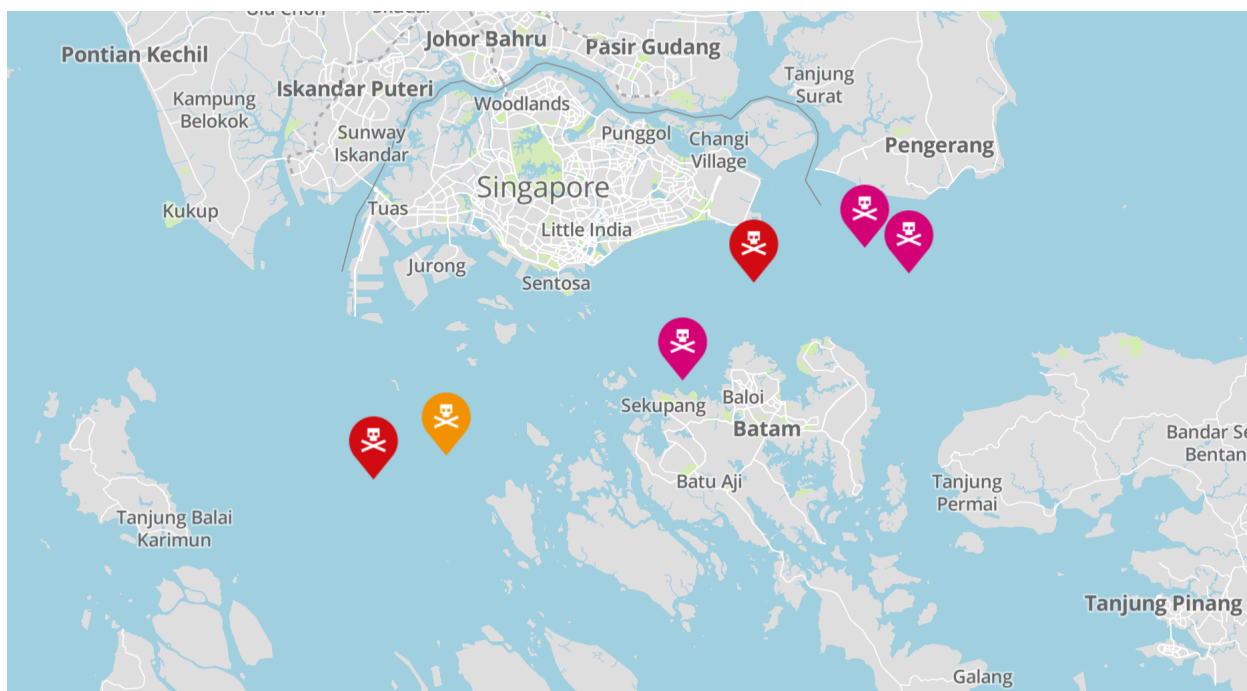
Opportunistic boardings remain possible in this area, even beyond 500 nautical miles from the coast, but levels of activity are expected to vary based on local conditions and on naval activity. The threat level is assessed to be elevated ongoing.

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: see also the Gulf of Oman – Persian Gulf assessment above.

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 31 August 2024, shown on the map below (Source: Risk Intelligence System).



Incidents

4 August – Offshore supply vessel SPEC NICHOLE boarded

Theft, Batam anchorage (Indonesia), 04:00 LT (20:00 UTC on 3 August)

5 August – Barge LKH 3883 boarded underway

Theft, Singapore Strait TSS, 17:05 LT (09:05 UTC)

6 August – Bulk carrier ULTRA COLONSAY boarded underway

Armed robbery, Singapore Strait TSS, 01:20 LT (17:20 UTC on 5 August)

11 August – Bulk carrier APHRODITE L boarded underway

Failed theft, Singapore Strait TSS, 04:45 LT (20:45 UTC on 10 August)

23 August – Barge JIN HWA 39 boarded underway

Theft, Singapore Strait TSS, 12:30 LT (04:30 UTC)

27 August – Bulk carrier LUCKY LONG boarded underway

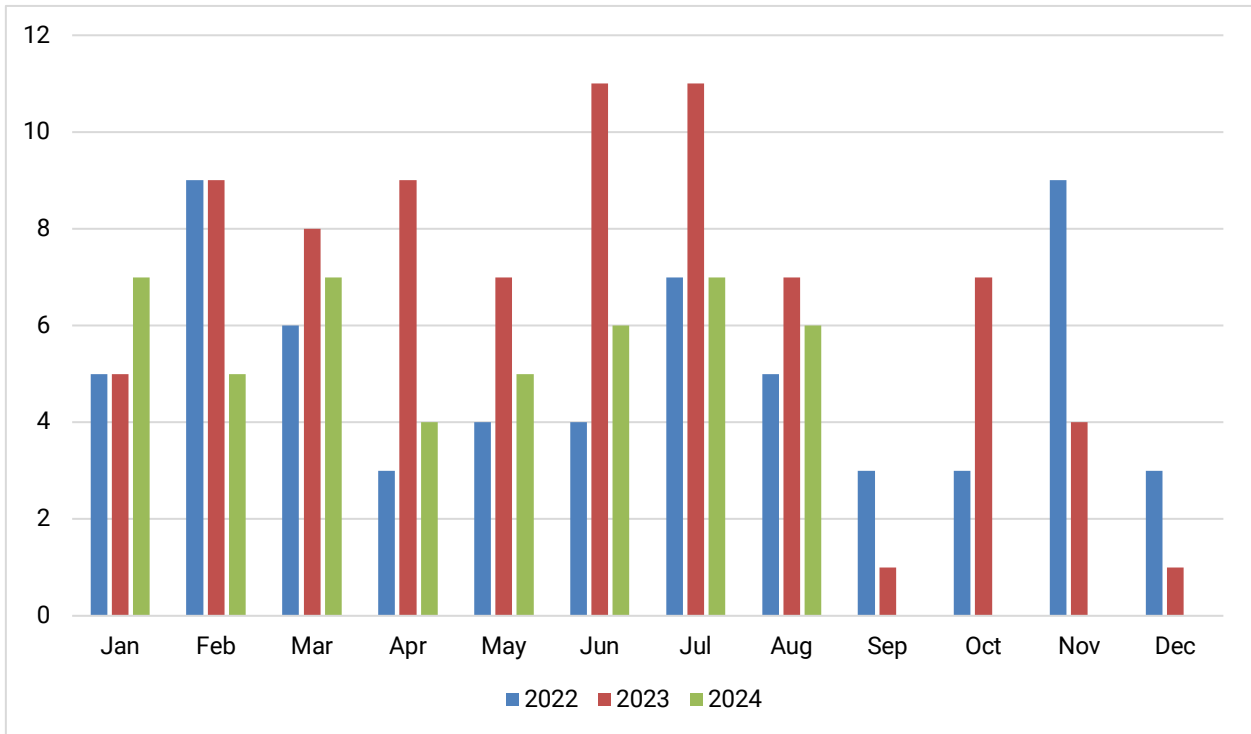
Theft, Singapore Strait TSS, 23:20 LT (15:20 UTC)

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. Six incidents were recorded in South East Asia in August, all of which took place within the boundaries of 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 August illustrates that vessels in anchorage areas remain at risk, as underlined by the SPEC NICHOLE incident.



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, 57% percent of reported incidents in the region have taken place in the Singapore Strait. Of these, 60% 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 60 incidents in the Straits of Malacca and Singapore (SOMS). Of these, 42 occurred in the Singapore Strait and 18 in the Malacca Strait. Of the total, 35 involved bulk carriers, 11 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, 76% 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, and the ports of Balikpapan, Batu Ampar, Belawan, Dumai, Manila, Sandakan and Vung Tau. A new location of incidents is Indonesia's port of Kuala Tanjung on the Malacca Strait where bulk carriers have been boarded by armed robbers at the anchorage and alongside the terminal berth this year.

Although the majority of boardings involving vessels underway take place in the SOMS, during the previous 12 months a barge in tow was boarded in the South China Sea. Just prior to that period a bulk carrier was boarded in the Phillips Channel outside of the Singapore Strait limitations. Overall, 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.

Incidents during the past 12 months illustrate that crew members may be tied up or injured during attacks. In October 2023 one vessel master was stabbed and there were other incidents during which seafarers 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 underway or at anchor for the purposes of theft or armed robbery is moderate. Higher threat locations include the Singapore Strait and the anchorages at Balikpapan, Batu Ampar, Belawan, Dumai, Kuala Tanjung, Manila, Sandakan and Vung Tau. Threat levels are lower 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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