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.

Monthly focus:

A new security architecture for the Middle East?

Introduction

Much remains to be seen with how a new Trump administration will shape US policy in the Middle East. Trump's election campaign focused on domestic issues – likely to be the main priority for his administration – but foreign policy was a consideration: particularly China, Ukraine, and Israel. As he plans his government, Trump has already suggested that Iran will be central to US foreign policy in the Middle East. Commentators have suggested that this will represent a 'top down' approach, where dealing with Iran will be the starting point, from which other regional initiatives will come from.

Additional sanctions against Iran are already being mooted. It is likely that Iran's nuclear programme will be the main driver. The previous Trump administration pulled the US out of the international agreement on Iran's uranium enrichment. However, the US response in 2025 is a long way from being fixed and will also depend on the personnel appointed to key foreign and defence policy positions – and how those appointments interact in decision-making forums such as the National Security Council.

A new administration, even one led by a returning president, invites much speculation. How will a president more preoccupied with symbolism and deal-making respond to current tensions in the Middle East? Ultimately, the region itself is changing as its major powers look to their own futures independently of patronage or enmity from the US and mindful of the rising power of China (and even India) in economic and political terms.

Saudi Arabia and Iran

The Middle East is in the process of reconfiguring its security architecture and diplomatic system. The US pivot to Asia, combined with the loss of relevance of the Middle East to its strategic priorities, has opened up the field to new alliances. In theory, it should also accelerate regional states' efforts to develop independent foreign and security policies.

Chief among those states is Saudi Arabia, whose strategic priority has been to ensure its economic sustainability when the oil runs dry. To do so, Saudi Arabia understands that regional politics must be pacified and become more attractive to foreign investment. The government has therefore engaged in large economic investments, diplomacy with Iran and Israel, as well as tried to put a lid on foreign policy tensions in its vicinity.

This was behind the 2022 ceasefire with the Houthis, which stopped Houthi attacks on Saudi infrastructure and ports. Likewise, efforts in 2023 to bring back the Bashar al-Assad regime in Syria into the Arab fold were largely designed to quell instability in the Levant and find new allies. Finally, the March 2023 agreement between Iran and Saudi Arabia allowed for a general decrease in tensions between the two. It also limited politically motivated seizures of vessels north of the Strait of Hormuz. Crucially, this deal was mediated by China, not the US.

China's Director of the Foreign Affairs Commission announcing the agreement between Saudi Arabia and Iran in March 2023 (Photo: Saudi Press Agency)

The Kingdom is seeking new security partners, and has been keen on building relations with China, so as not to let Iran enjoy that relationship alone. Arab allies of the US strongly doubt the US commitment to their security and have sought to diversify their security providers, as well as develop native military capabilities.

This is also the main gambit by Saudi Arabia: seeking to obtain nuclear technology from the US in exchange for its recognition of Israel, with which it maintains not-so-secret relations – politically appalling to most Arab populations. The US worries, however, that a nuclear-enabled Saudi Arabia would no longer feel as obliged to US policy as previously, especially if other partners step up to replace it, should it become a nuclear power.

The parallel with Iran is notable. The Islamic Republic is developing its own nuclear technology amid efforts to guarantee its own survivability, only without US assent. Iran has no expectations of a let-up in American enmity and is likely bracing for further efforts against its interests. This has pushed it to strengthen alliances to circumvent US hostility and to ensure its own economy remains sustainable despite Western sanctions.

Iran's priority, after the regime's survival, is the consolidation of an economic bloc able to withstand foreign pressure, but which also allows it to project power in the Middle East. The country has therefore spun a web of proxies, who also serve as vehicles for its own economic interests, providing influence, trade routes and contracts across the Middle

East, from Yemen to Syria and Iraq, in exchange for advancing their own interests along with those of Iran.

Fundamentally, both Iran and Saudi Arabia seek to become the regional hegemon. Short or longer-term change, such as the latest de-escalation agreements or the US retreat from the region will not change their underlying rivalry. Any US retreat makes becoming a hegemon possible for either side, although both countries' ambitions will be financed by oil in the near future.

Is it China's turn?

Therein lies China's opportunity to gain influence in the region. China is a significant trade partner to both Iran and Saudi Arabia. It exerts influence over their policies and can help them steer away from the US orbit. China has the notable advantage of having no historical burden in the region, eliciting much less antipathy and suspicion than the US.

However, Chinese influence has its limits, especially in the security field. China is not seen as a credible security actor yet, and there have been few signals that China has any intent of becoming one. Chinese military presence in the region is limited, with only a single base in Djibouti and no significant history of military operations. In a region where military power projection is often the first tool of diplomacy, this plays in favour of the US.

A Chinese naval vessel in Djibouti (Photo: Xinhua)

China itself may not be in a hurry to replace the US as a security provider, wary of the cost of doing so. Intractable conflicts in the Middle East have little bearing on China, which maintains at least cordial relations with all players. Saudi Arabia and Iran are courting it, the Houthis avoid targeting Chinese vessels, Israel has displayed a discreet pattern of not striking Chinese-used facilities. Finally, China benefits from the absence of an umbilical relationship like the one between the US and Israel.

Overall, while talk about the Middle East looking for new friends is true, China may not count among them. The country has no political interests in the region, besides energy supplies, and its regional goals are limited. Iran and Saudi Arabia are looking for economic and security partners, aware that China cannot and will not become the latter.

Diplomatic junk food

Saudi Arabia and Iran therefore find themselves left to their own devices. From their perspective, China confines its relationship to economic matters, and the US can only be relied upon to support Israel. They need to find other solutions to their problems – many of them a direct result of their own policies. Iraqi sectarianism, the war in Yemen and the disintegration of Lebanon were all compounded by the Saudi-Iranian rivalry.

Hezbollah fighters in southern Lebanon (Photo: Social media/X)

Neither actor is currently able to impose their order in the region. However, both are wary of a broader confrontation that their regimes would not have the domestic wherewithal to survive. In short, there is no clear path to stability. Expectations that the dust will settle soon, or that China will expend resources on a region marginal to its interests, are likely wrong. The most likely outcome is a patchwork of fickle agreements, meant to satisfy short-term needs or goals with little impact overall.

The Abraham Accords are a textbook example of what Middle Eastern diplomacy will most probably look like in the coming years: short-term deals that fail to address underlying issues. This new transaction-style diplomacy is most likely to become a series of give-and-takes between capitals disconnected from their populations, bringing no broader benefits to the region or its stability.

With no great power to manage their rivalry, both states are expected to branch out towards new partners. Saudi Arabia may deepen its relationship with Israel, in exchange for further support from the US, which may mean new arms supplies for both sides but little else besides tactical arrangements to limit disruptions to the oil flow.

Arguably the only diplomatic success in the Middle East in recent years has been China's 2023 deal to get Tehran and Riyadh to guarantee safe passage for their oil. The conditions for further policy changes are not met, and anything beyond the oil flow is a secondary concern for either Riyadh, Tehran or Beijing.

Maritime instability in the Persian Gulf?

The ceasefire between Israel and Hezbollah, with a buffer zone in southern Lebanon, offers a chance to assess what the next round of diplomacy and engagement might look like. Iran now finds its proxy Hezbollah weakened and constrained from future action. But it might also find that not escalating further with Israel is a welcome development, particularly given Israeli threats to target even more critical infrastructure in Iran.

There is likely to be a shift to longer-term threats and security disputes, such as Iran's nuclear programme. Iran's oil exports to China are the financial lifeline to Iran, one that the US might seek to sever with more sanctions and perhaps more aggressive enforcement. Iran has already demonstrated over the past few years that it is willing to take action in specific disputes over its exports, including seizing merchant ships as bargaining chips. The immediate threat of escalation in a regional conflict may be reducing. Specific issues, however, still have to be dealt with against the backdrop of changes in the regional security architecture.

Update: Maritime dimensions of the war in Ukraine

Situation on land

Following the results of the US presidential election in November, the outgoing Biden administration has been seeking to shore up current and promised supplies of both financial and military support to Ukraine. While it remains uncertain what the incoming Trump administration will prioritize, the November attacks by both Russia and Ukraine are likely attempts of positioning prior to potential peace or ceasefire negotiations. This is likely to continue in December.

During November, Russian offensive moves have continued along the front line with some Russian advances. It is still assessed that the current focus of the Russian military operations, is to weaken Ukrainian society for the winter.

Ukrainian president Volodymyr Zelenskyy visiting US president-elect Donald Trump (Photo: Reuters)

Russian forces continued attacks on Ukrainian energy infrastructure in November, with several large-scale attacks reported. Following previous attacks, especially on energy infrastructure, Ukrainian port authorities announced that they were better prepared to limit the operational impact. However, local impacts following each new wave of Russian attacks are likely to vary. Some disruptions cannot be ruled out.

The ability of Russia to threaten and attack Ukrainian energy infrastructure remains dependent on Ukrainian capabilities to protect these facilities. Although the contact line has been altered as a consequence of the ongoing Ukrainian incursion into Russia, the operation has not yet had any real impact on the war.

As a result of Russian attacks, localised scheduled power outages were often reported throughout Ukraine in November and are expected to continue. Recent reports by the national

Ukrainian energy provider noted that scheduled power cuts will likely continue during the day during the winter. Implications for port operations are likely to differ but some impact should be expected.

Following the change in US policy towards how far Ukraine can target into Russia, it cannot be ruled out that port infrastructure may be targeted as part of future attacks. Additionally, with the UK allowing Ukraine to use long-range Storm Shadow missiles on Russian territory, it is possible that attacks will be directed against maritime targets. In this case, targets are likely to be energy infrastructure, naval stations like the Novorossiysk Naval Base, or naval vessels.

Black Sea

Commercial maritime traffic continues to transit the Ukrainian Black Sea corridor, also known as the ‘humanitarian corridor' which includes the ports of Odessa, Chornomorsk and Pivdenny. No vessels were involved in incidents in November and the overall threat level for merchant ships transiting the corridor remains unchanged and lower than during port calls, reflecting that transits are relatively stable and secure.

Attacks on Ukrainian civilian infrastructure, including against port facilities, are expected to continue. Any outcome of a ceasefire negotiation may also influence attacks on port infrastructure. The current general threat from military operations nevertheless remains high.

Attacks towards Russian ports remain unlikely to target commercial maritime operations or vessels in particular. Defensive gunfire by Russian forces, however, may cause collateral damage on merchant ships.

Russian forces remain capable of striking the Ukrainian Black Sea and Danube coast, maintaining a general 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 commercial shipping in the Black Sea are expected to be limited to ensuring the passage of merchant vessels to Russian ports and the Sea of Azov. Attempts to disrupt any scheduled flow of vessels transiting to Ukrainian Black Sea ports remain possible, potentially by harassment, spoofing of navigational systems or – in extreme cases – direct targeting.

Operational disruptions and threats resulting from military operations are expected to remain until actual security guarantees are provided for ships transiting the corridor. Such guarantees should address the threat of Russian actions against ships on voyages to and from 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 remains unchanged, as port infrastructure remains 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 and local guidance. Local operational differences and issues should be expected and subject to change. Ukrainian ports which are not part of the Black Sea corridor are closed to normal operations. Maritime operations will be influenced by the general security situation as well as political developments.

Delays and operational disruptions to Ukrainian ports should be expected, including due to ongoing issues with drifting mines and disruptions due to Russian attacks on Ukrainian civilian energy infrastructure.

Summary

Ongoing attacks and subsequent damages inflicted on Ukrainian energy infrastructure remain significant, although the actual impact on ports and related industries is unclear as they are likely to vary locally. Daily regional energy disruptions have been reported throughout Ukraine in November. The Ukrainian incursion into Russia's Kursk region remains ongoing and is generally thought to be part of wider strategies to assert pressure on Russia.

Ukraine's president Zelenskyy made several foreign visits in November, including to the US, where he met with both US president Biden and president-elect Trump. These visits were part of diplomatic efforts to shore up ongoing support from partner countries.

Ukrainian President Zelenskyy with French President Macron in Hungary in November (Photo: Ukrainian Presidential Office)

Any future ceasefire negotiations would be a significant breakthrough in the conflict. However, as was seen with the UN-brokered Black Sea Grain Initiative, such arrangements only remain in place for as long as both parties adhere to agreed terms and conditions. Therefore, Russian attacks against Ukrainian civilian infrastructure and Ukrainian attacks into Russia in November indicate that both parties are attempting to position themselves for future negotiations. This positioning is likely to continue for the foreseeable future.

Recent reports of additional troops do not indicate any significant change in capabilities on either side for the coming months. For Ukraine, all efforts are influenced by the timeline of new military supplies promised by its partners.

It remains 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, collateral damage remains the most likely threat for merchant ships. Such incidents would be most likely isolated cases rather than a sustained campaign by either side.

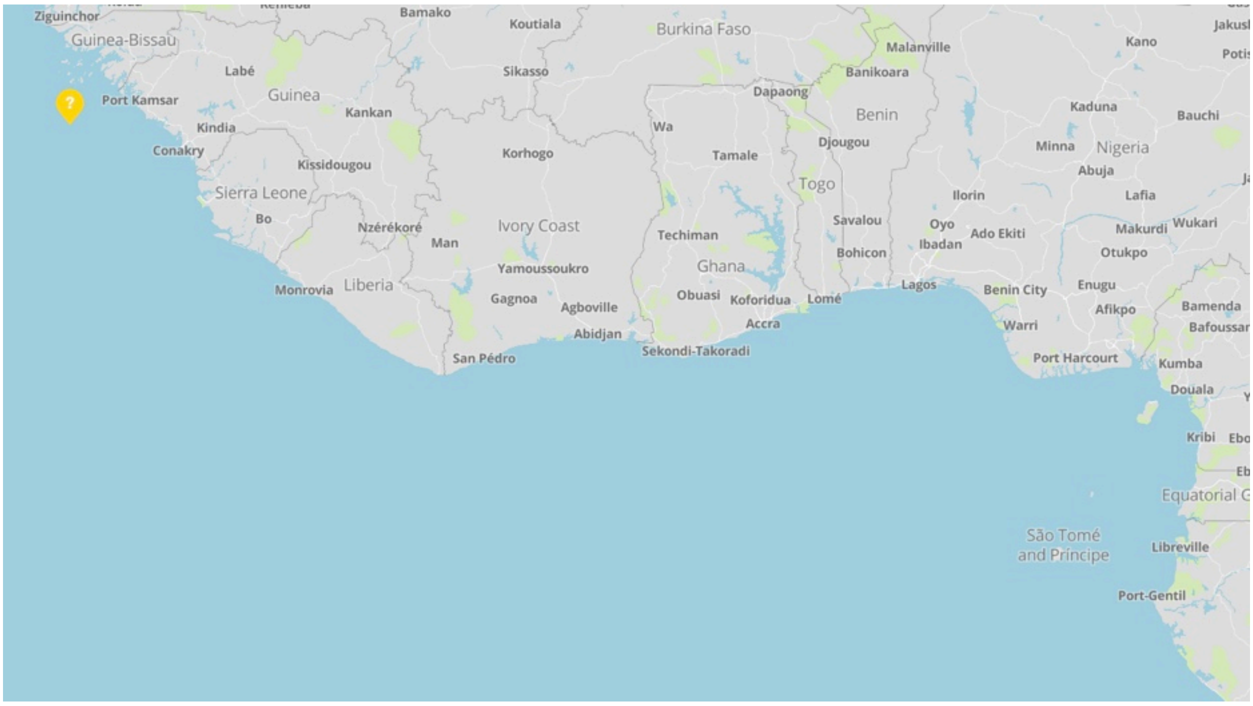
The impact of future Ukrainian and Russian operations should be monitored closely. Risk Intelligence strongly recommends thorough threat and risk assessments prior to any transit and to update contingency plans according to the current situation.

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



Incidents

25 November – Merchant vessel reports suspicious sighting
Suspicious activity, 100 nm W of Kakende (Guinea), 16:15 LT/UTC

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 incidents involving merchant ships during that period, however, have underlined that the threat has not been completely eradicated.

Attacks against local vessels in or near the Niger Delta highlight the fragile security situation in this part of Nigeria. These attacks are often linked to other illicit activities, namely to oil-related crimes, or to conflicts between oil companies and local communities.

Overall, crude oil theft and smuggling of illegally refined oil products have long been major 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 these much more profitable operations.

As a consequence, Nigerian crude oil production and export levels remain suppressed. Monthly production figures show shortfalls between of up to 20% to the target set in this annual government budget. Subsequent revenue shortfalls limit government efforts to boost growth and development in the Niger Delta as well as in other parts of the country.

Destroyed illegal refining site in the Niger Delta (Photo: Nigerian Ministry of Defence)

Security agencies carry out frequent operations to limit oil theft. In November, Nigerian security agencies once again announced the destruction of dozens of illegal refining sites in several Niger Delta states as well as seizures of stolen crude oil and illegally refined oil products. These efforts are part of Operation Delta Sanity, ongoing since 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 security 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. Meanwhile, 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 situation are possible. Maritime operators should monitor developments as an uptick in attacks against merchant ships is possible anytime.

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 upcoming dry season which will last until about March enable operations deep offshore with small boats. Attacks may therefore take place at significant distances from the coastline.

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 is the only 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 the current dry season which will last until about March. 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 November: a sighting of a small boat following a merchant ship off Guinea. Similar to many other reports about suspicious vessels, it is very likely that the crew merely observed a small fishing vessel and reported this incident as suspicious due to the distance from the coastline. Even wooden canoes, however, can operate at significant distances offshore throughout West and Central Africa.

Overall, the trend of few security incidents continued. Moreover, virtually all security incidents that took place in the recent past were low-profile cases which did not result in physical confrontations with crew members. Perpetrators are instead likely to escape upon discovery by the crew.

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

Incidents

24 November – Vessel reports suspicious approach
Suspicious activity, Somali Basin

A complete list of Houthi attacks and related incidents 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".

There were nine incidents in the Red Sea and western Gulf of Aden in November, including two attacks on merchant ships (one vessel was targeted twice), and three suspicious incidents that are analysed below. The other three incidents were two military strikes against targets in Yemen, and an attack on a US warship by Houthi forces.

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.

Attacks against merchant ships by Houthi forces remained at a low level in November with just three attacks (against two ships) reported. The number of monthly attacks has been below ten since July. The Houthis have likely concluded that their campaign of reducing Israel-linked traffic in the region has been successful and requires only limited numbers of attacks to maintain deterrence. Two strikes on targets in Yemen by US forces were also carried out during the month.

The US destroyer USS JASON DUNHAM transits the Suez Canal (Photo: US CENTCOM)

A ceasefire between Israel and Hezbollah was agreed on 26 November, creating a buffer zone in southern Lebanon to prevent further conflict. The Houthis welcomed the ceasefire but have not hinted at any change in their Red Sea campaign, which is expected to continue along the current lines. Broadly speaking, the ceasefire is welcome and opens the door for further de-escalation. It allows for Iranian proxies to recuperate and consider their next steps.

There were three suspicious incidents reported in the western Gulf of Aden close to the Bab el Mandeb during the month. The bulk carrier S LINE reported that the ship was hailed over VHF by someone claiming to be from the Yemeni authorities. The vessel was warned to not transit the Bab el Mandeb, or they would be targeted. The master subsequently turned off AIS to await company guidance before proceeding to the next port of call.

For transits through the Gulf of Aden and the Red Sea, it should be noted that naval recommendations to switch off AIS do not appear to be based on credible figures. Overall, there is no evidence to suggest that switching off AIS lowers the chances of vessels being targeted. It may limit the success rate for missile attacks in particular, but this does not apply to attacks conducted by aerial or naval drones. Moreover, not broadcasting AIS may complicate efforts to support a ship after an attack.

Two motor yachts also reported suspicious approaches in this area. Both yachts reported groups of small craft. No aggressive manoeuvres were observed and the approaches were highly likely to have been pattern-of-live activity by local craft in the area. Fishing fleets are based in nearby Aden and routinely operate in the western Gulf of Aden.

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.

Forecast

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 ships. This will remain the case even as the number of attacks continues to be relatively low. The naval presence is providing some support to merchant traffic but is not a sufficient deterrent to prevent Houthi attacks.

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 incidents reported in this area in November. Iran has not carried out additional strikes against Israel, in response to Israeli strikes on Iranian targets in October. Despite its rhetoric, Iran has been reluctant to escalate the conflict and now faces the challenge of trying to rebuild Hezbollah in Lebanon following Israel's military campaign.

Despite the absence of incidents in the past six months, and the overall trend in 2024, Iran's approach has not fundamentally changed. In recent months, Iran has focused on supporting its proxy forces in Gaza and Lebanon, the Houthi campaign in the Red Sea, and limited direct strikes against Israel.

Nevertheless, Iran retains the option to carry out limited operations in its maritime backyard – particularly of the type seen in 2023 and prior: limited strikes against specific ships directly linked to Israel through ownership or management, or attacks against ships linked to a commercial dispute (including US-linked vessels). Iran has undertaken these operations to retaliate without substantial risks of escalation.

Iranian forces boarding the ADVANTAGE SWEET in April 2023 (Photo: Iranianmedia)

With the offloading of the cargo from the ADVANTAGE SWEET, Iran might see this dispute as ‘closed’. Incidents affecting US-linked merchant ships may still occur as an Iranian response to specific actions taken by the US and its allies in the region.

The incoming Trump administration is expected to focus on Iran’s nuclear programme (see this month’s feature article). New sanctions affecting Iran’s oil exports have been mooted. Iran might therefore choose a series of responses in the coming months, supporting the current threat level for merchant ships.

Forecast

There has been a heightened threat to merchant ships 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 the conflict with Israel but has a number of asymmetric options to continue to pressure Israel, including in the maritime environment. Iran will feel increasing pressure if Israel continues operations against Hezbollah in southern Lebanon but must be cautious to avoid wider regional implications to its own security.

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

There was one incident in this area during November. A merchant ship reported the approach of a dhow in the Somali Basin on 24 November. The closest approach was only one nautical mile, however, and there were no aggressive manoeuvres. It is very likely that this was a sighting of a trading dhow, a common vessel type in the area.

There have been no recent pirate attacks. The tempo of Houthi attacks in the Gulf of Aden has also reduced in line with fewer attacks in the Red Sea. Naval action has been particularly effective against pirate activity, led by the Indian Navy – responsible for freeing the RUEN and the LILA NORFOLK. One pirate group was able to hold the ABDULLAH off Somalia, however, and a ransom of a claimed $5 million was paid for the ship's release in April.

There might not be the shore-based infrastructure to support large-scale piracy activities similar to the situation a decade ago. Nevertheless, the ABDULLAH ransom shows that there are still financial incentives for opportunistic pirate attacks despite the deterrent factor of naval operations.

Since the initial surge in pirate attacks in late 2023 and early 2024, related activity has moved back closer to the Somali coast and the Gulf of Aden as a result of the monsoon period but also likely a greater reluctance amongst perpetrators of operating farther out in the Indian Ocean where naval vessels are patrolling. EUNAVFOR estimates that there are no more than three pirate groups in operation.

Forecast

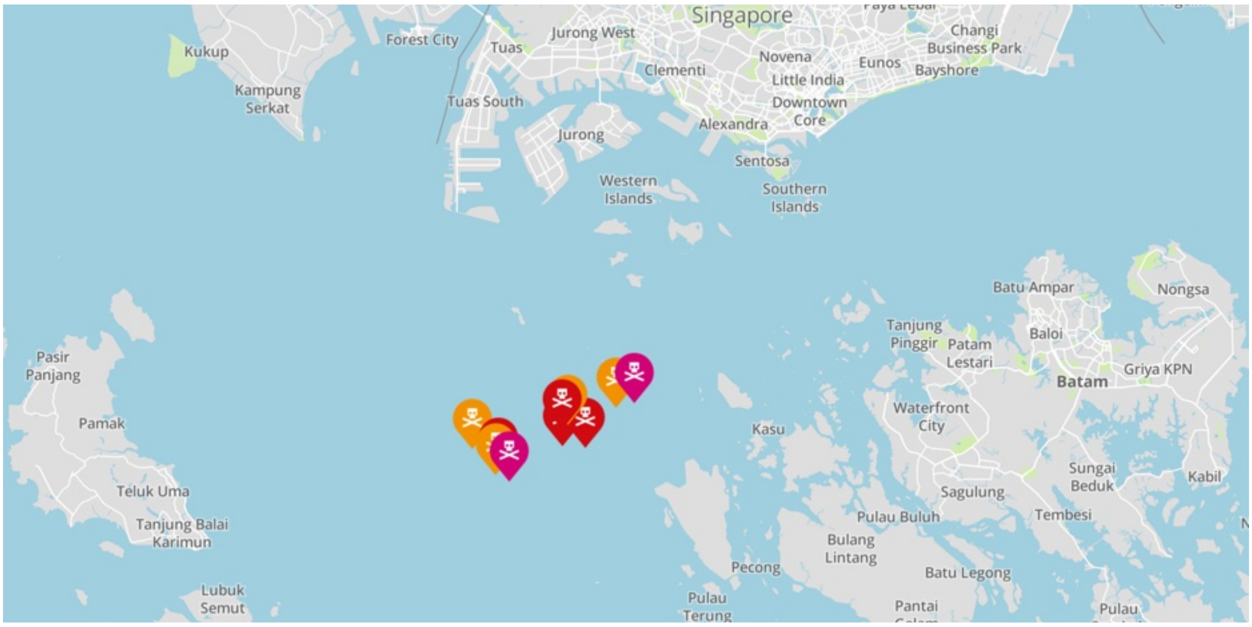
Opportunistic boardings remain possible in this area, even beyond 500 nautical miles from the coast, but levels of activity are expected to vary based on local conditions and naval activity. The threat level is assessed to be elevated but trending downward.

There is a moderate threat to vessels linked to Israel to become targets for attacks. The ability of Houthi forces to target ships in the wider Indian Ocean is very limited 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 November 2024, shown on the map below (Source: Risk Intelligence System).



Incidents

13 November – Crude oil tanker METRO IONIAN boarded underway
Theft, Singapore Strait TSS, 00:12 LT (16:12 UTC on 12 November)

13 November – Bulk carrier OSHIMA TRADER boarded underway
Armed robbery, Singapore Strait TSS, 04:30 LT (20:30 UTC on 12 November)

14 November – LPG tanker NUS boarded underway
Failed robbery, Singapore Strait TSS, 01:48 LT (17:48 UTC on 13 November)

14 November – Bulk carrier DARA boarded underway
Failed robbery, Singapore Strait TSS, 02:46 LT (18:46 UTC on 13 November)

14 November – General cargo ship SAGA FJORD boarded underway
Armed robbery, Singapore Strait TSS, 04:07 LT (20:07 UTC on 13 November)

17 November – Bulk carrier DOKOS boarded underway
Failed robbery, Singapore Strait TSS, 04:00 LT (20:00 UTC on 16 November)

19 November – Bulk carrier AMMOS boarded underway
Theft, Singapore Strait TSS, 21:49 LT (13:49 UTC)

20 November – Bulk carrier GENCO LION boarded underway
Failed robbery, Singapore Strait TSS, 05:10 LT (21:10 UTC on 19 November)

23 November – Bulk carrier HTK CONFIDENCE boarded underway
Armed robbery, Singapore Strait TSS, 01:50 LT (17:50 UTC on 22 November)

24 November – Bulk carrier THEODORE JR boarded underway
Armed robbery, Singapore Strait TSS, 01:00 LT (17:00 UTC on 23 November)

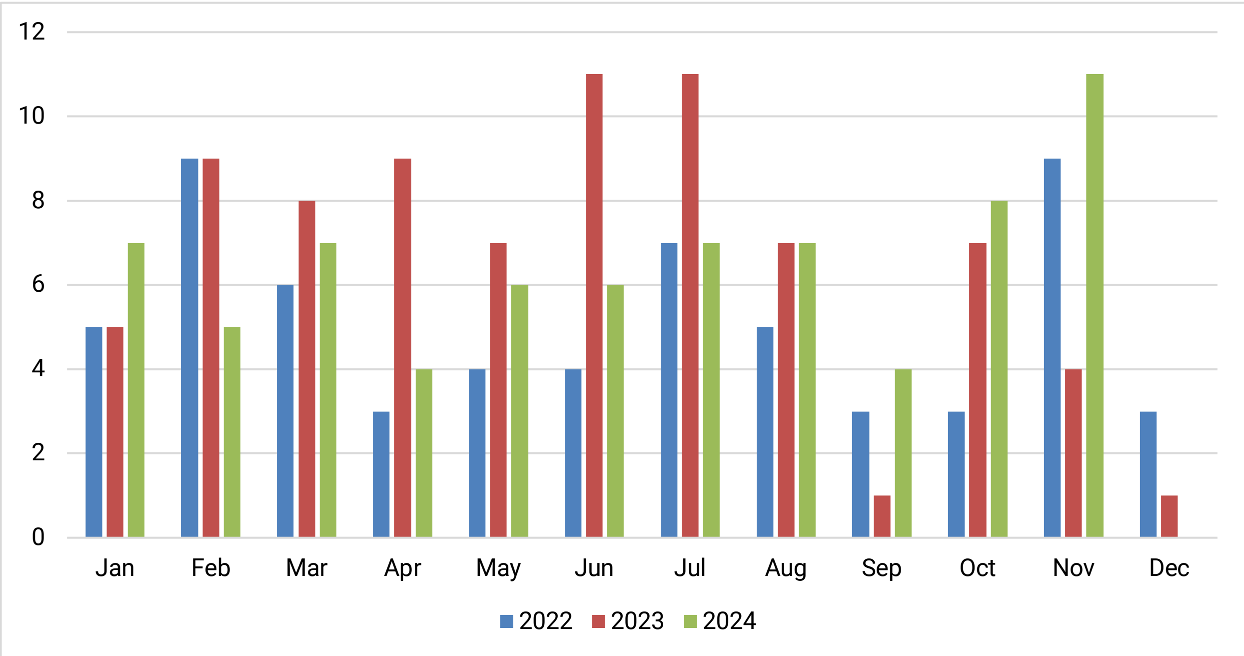
26 November – Bulk carrier EXPRESS boarded underway
Failed theft, Singapore Strait TSS, 00:01 LT (16:01 UTC on 25 November)

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. Eleven incidents were recorded in South East Asia in November, all of which took place within the boundaries of the Singapore Strait.

While the activity recorded in November illustrates the typical nature of crimes in the region, the trend of perpetrators acting more aggressively towards crew members is cause for concern.



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, 69% percent of reported incidents in the region have taken place in the Singapore Strait. Of these, 59% 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.

There have been 73 incidents in the Straits of Malacca and Singapore (SOMS) during the past 12 months. Of these, 59 occurred in the Singapore Strait and 14 in the Malacca Strait. Of the total, 46 involved bulk carriers, 10 involved tankers, while 8 involved barges and other craft in tow. The outliers involved general cargo vessels, heavy lift vessels, OSVs, and a rig. No incidents in the SOMS have involved container ships or passenger vessels.

Overall, 77% of all SOMS incidents during this period targeted ships underway, all but one 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.

Like the Java Sea tug hijackings in February and September this year, similar incidents in previous years that involved locally trading tugs and small tankers illustrate the vulnerability of regionally-trading 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, Batangas, 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 in addition to the Java Sea tug hijackings, 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. Most incidents in the region involve bulk carriers and tankers. 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, a 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 two aforementioned Java Sea tug hijackings, the hijacking of a tug in March 2023 during which palm seed batches were stolen from the barge in tow and a bunker barge hijacking off Sulawesi in January 2022 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 cargo 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, price increases could drive sustained or increasing fuel smuggling and sales in the South China Sea, Sulu/Celebes Seas and the SOMS. Demand for bio-fuel products could be another driver motivating hijackings. 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, Batangas, 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 and tugs. 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 assessed as 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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