

RiskIntelligence

Monthly Intelligence Report

February 2025

Risk Intelligence A/S
Strandvejen 100
2900 Hellerup
Denmark

Tel: +45 7026 6230
info@riskintelligence.eu
www.riskintelligence.eu

Table of contents

Monthly focus:	4
Maritime security in a shifting world	4
Introduction.....	4
Strategic level	5
Operational level.....	6
Tactical level.....	7
Conclusion	7
Update: Maritime dimensions of the war in Ukraine	9
Situation on land.....	9
Black Sea situation.....	10
Summary and forecast.....	11
West Africa	13
Incidents	13
Assessment	14
Inner Gulf of Guinea (Togo to Cameroon)	14
Outer Gulf of Guinea (Côte d'Ivoire to Gabon)	15
Western Indian Ocean	17
Incidents	17
Assessment	18
Southern Red Sea – Gulf of Aden.....	18
Gulf of Oman – Persian Gulf.....	19
Somali Basin and wider Indian Ocean.....	20
South East Asia	22
Incidents	22
Assessment	23
Straits of Malacca and Singapore, South China Sea, Indonesian archipelago, Sulu / Celebes Seas.....	23
Definitions	28
Threat levels	28
Incident types	28

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.

Advice given and recommendations made do not constitute a warranty of future results by Risk Intelligence or an assurance against risk. Recommendations made are based on information available at the time of writing. No express or implied warranty is given in respect of any judgment made or to changes or any unforeseen escalation of any factors affecting any such judgement.

Documents are for the benefit of the client only and may not be disclosed to any third parties without the prior written consent of Risk Intelligence; such consent not to be withheld unreasonably. The client agrees to indemnify Risk Intelligence against any claims and any resulting damages that may be caused by any unauthorised disclosure of such documents.

Monthly focus:

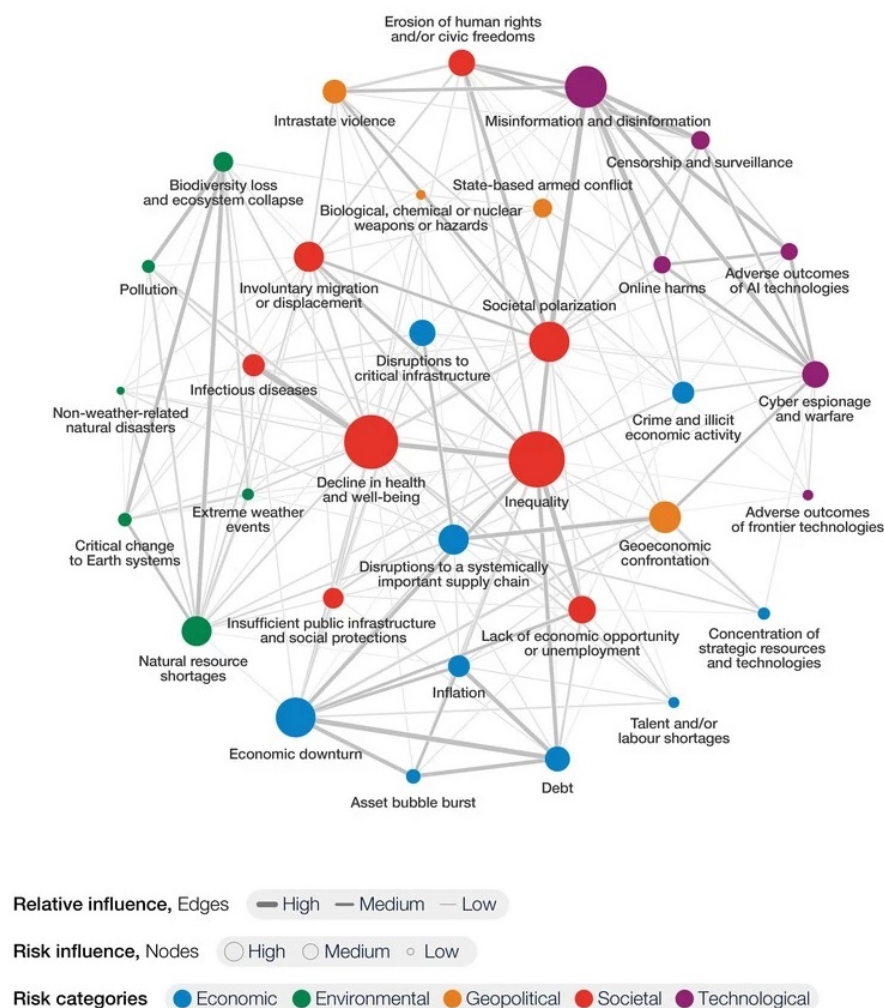
Maritime security in a shifting world

Introduction

Maritime security has become a critical concern for many governments and businesses. At the same time, it is useful to understand maritime security as a problem with completely different layers.

Political and economic factors are key for strategic decisions of government and security agencies as well as companies. At the operational level, progress and availability of emerging technology is important to identify and implement mitigation measures for specific threats. Finally, incidents at the tactical level are concrete examples for the impacts of a changing maritime landscape on day-to-day operations.

Furthermore, a mere focus on security-related issues is not enough, illustrated by the interconnections map below.



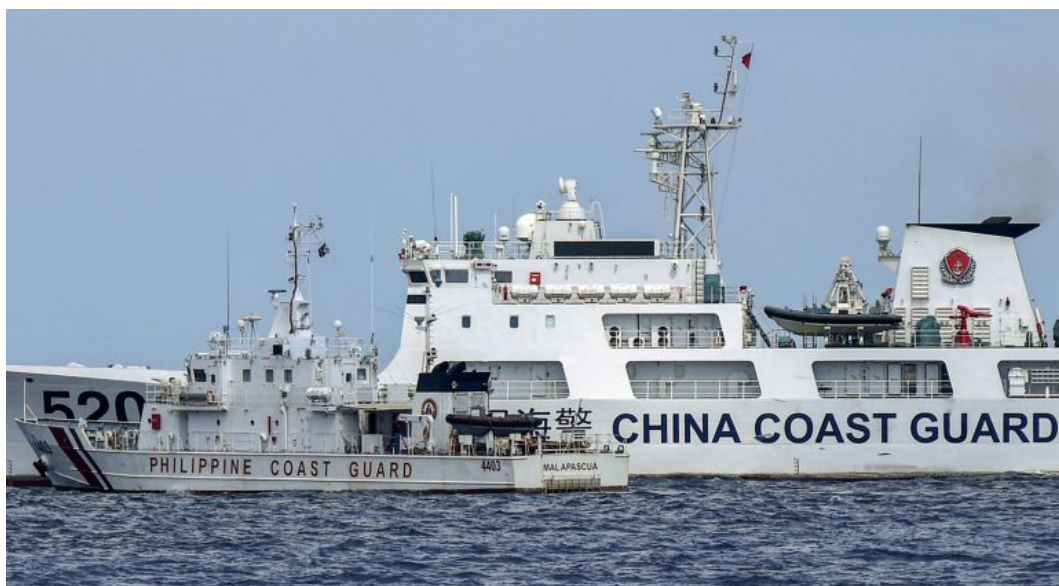
The graphic shows that a thorough understanding of security threats requires a look at many other factors since these are more or less closely connected: economic confrontation, misinformation and disinformation or even the erosion of human rights and civic freedoms, to name just a few. Moreover, the links between specific issues are different in various regions around the globe.

Strategic level

Political dynamics, both between and within states, are a key factor. At a time of rising geopolitical tensions, these often have direct implications or knock-on effects in the maritime environment.

Economic trends and their potential impacts on maritime trade as well as – by extension – maritime security are also noteworthy. Potential impacts have become particularly obvious after the return of Donald Trump as US president. It is at least possible that his administration's policies will lead to significant trade disruptions. New tariffs and an even more widespread sanctions regime should be monitored closely in this regard. While these dynamics are not new, they may accelerate in the coming years.

Both aspects have a major impact on maritime security strategies on the national and regional level. Which threats are political priorities? Are naval forces able to combat piracy or do they focus on other tasks? Can warships actually protect merchant ships from specific threats? These and similar questions are often complicated to answer.



Coastguard vessels from the Philippines and China during a confrontation in the South China Sea (Photo: Philippine Coast Guard)

In addition, the broader context of the situation in different regions has to be taken into account. In the South China Sea, China's regional hegemony can only be challenged by the United States as an outside actor. This rivalry also has much more global implications

than, for example, the situation in the Eastern Mediterranean where various countries have also been engaged in maritime boundary conflicts for a long time, albeit without a single dominant hegemon.

Operational level

Hybrid threats have often been highlighted in recent years. They have developed into a buzzword, even though such threats – under different names – have been relevant for centuries:

- Disruption of undersea cables has been an issue since the first telegraph cables were laid in the mid-19th century.
- Economic sabotage was common between Venetian and Genoese merchants who fought over supremacy in the Mediterranean. When seeing a vessel of the other state in virtually any port, merchants often attempted to sabotage it, e.g. by cutting the anchor ropes.
- Societal disruption through disinformation and propaganda is not a new phenomenon either. One of the earliest examples was the Athenian attempt to destabilize Sparta by encouraging a slave rebellion.

Technological progress has led to new vulnerabilities and provided adversaries with new capabilities. At the same time, recent disruptions of undersea cables by ships dragging their anchor have shown that high-tech means may not be necessary to create considerable impacts.



Damaged anchor on the bulk carrier VEZHEN which allegedly disrupted an undersea cable in the Baltic Sea in January 2025 (Photo: Social media)

Some elements, however, are new. Cyber threats against IT and OT systems, for example, are constantly evolving. Unmanned systems are also a relatively new technology which has become ubiquitous in just a few years. The war in Ukraine has further accelerated the advance in capabilities which is likely to inspire a broad range of actors in the near future. The Houthi campaign has shown how cheap aerial and naval drones can be used to effectively disrupt commercial shipping.

Overall, proliferation of relatively low-cost technology in combination with widespread proficiency means that a vast array of actors can now pose related threats. This is likely to lead to additional maritime security challenges in the coming years as the effectiveness of mitigation measures is currently impossible to predict.

Tactical level

One of the immediate impacts of specific threats – or even attacks against merchant ships – is often an increased presence of warships. The deployment of naval vessels, however, is not always reassuring for seafarers as they may also be regarded as intimidating. The Persian Gulf or the South China Sea are useful case studies for areas where commercial ships could be blocked from specific operations or even seized by naval forces.

In addition, new actors can quickly develop into a significant threat for commercial operations. There are already numerous examples of criminal organisations or militant groups experimenting with new technology, ranging from drug cartels in South and Central America to Islamists in various African countries.

Secondary impacts of developments on land are yet another potential concern. Various groups around the globe have successfully occupied spaces outside the control of central governments. When such groups try to expand their influence or when they are challenged, knock-on impacts at sea are possible. Houthi attacks against commercial shipping in the Red Sea and the Gulf of Aden have been a prominent example in recent months.

Conclusion

Tracking geopolitical risks can be outsourced but translating that information into the “so what?” is a highly company-specific task. A company like Risk Intelligence can help clients to make sense of events, data and information but what that means on the company level is of course different for a feeder operator in the Middle East and a globally trading tanker owner, to name just two examples.

Too much focus on the urgency of headlines and current events may keep companies from finding out more about geopolitical drivers and trends with a bigger impact on risks and opportunities. These may not only manifest themselves in the long term but also within months or – in some cases – weeks. In addition, geopolitical dynamics may have a major impact on the long-term value of a company. Investments in capabilities to analyse not only events but the underlying trends are therefore vital.

Finally, security challenges and broader geopolitical issues are not just downside risk. Companies which build an effective system to identify relevant aspects or triggers can often identify opportunities early or prepare for sudden challenges much better than competitors. While it may be hard to calculate or demand a specific return on investment, various factors make such investments worthwhile.

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

Although there were movements along the contact line, and Russian operations resulted in some advances, there was generally little change from December. Russian forces have continued to target Ukrainian energy and other civilian infrastructure with the continued intention to weaken Ukrainians' ability to protect against the winter.

Military and political developments in January can be viewed as attempts to position themselves as best as possible in relation to the Trump administration in the US. While it remains uncertain how the new administration will prioritise, statements by various US officials indicate that a longer negotiation process and focus on a lasting settlement is preferred rather than a quick end to the war. However, there remains a degree of elusiveness in the Trumps administration's stance towards both Russia and Ukraine, which adds to the continued uncertainty of any ceasefire negotiations.

Various timelines for ending the war were proposed during and after the US presidential election – from 24 hours and 100 days to six months. The varied timelines add to the ambiguity and appear to be part of the Trump administration's current tactics for dealing with the war in Ukraine.



Ukrainian president Volodymyr Zelenskyy at a Day of Remembrance of the Heroes of Kruty in January 2025 (Photo: Ukraine Presidential Office)

The present situation is therefore likely to continue, albeit with varying intensity and focus of attacks, with Russian forces likely to continue to target Ukrainian infrastructure and continue to attempt to occupy greater areas of Ukraine. It is also likely that Ukraine will continue with conducting attacks in Russia, particularly to target oil-related facilities, to impact the ability for Russia to produce and export oil products.

There were reported increases in Ukrainian bomber jet activity in late January, especially aircraft flying in specific attack patterns without launching missiles. These activities have led to multiple instances of air raid alerts in Crimea and closures of the Kerch Strait bridge. This activity could indicate Ukrainian training or preparation for a larger strike in the near term – possibly against maritime- or high-profile targets in occupied areas or Russia.

The ability of Russia to threaten and attack Ukrainian energy infrastructure remains dependent on Ukrainian capabilities to protect these facilities. While the contact line continues to change marginally, the ongoing Ukrainian incursion into Russia also continues.

Localised scheduled power outages were often reported throughout Ukraine in January. Ukrainian energy providers have stated that scheduled power cuts will likely continue in February. Russian forces are also likely to continue to target civilian infrastructure including ports. Knock-on impacts for port operations are likely to differ but some impact should be expected.

Risk Intelligence also offers a weekly report which provides an up-to-date situational picture for port calls and other types of commercial maritime operations in the northern part of the Black Sea.

Black Sea situation

Across the Black Sea, the regional security picture varies depending on the operational area. Impacts or disruptions caused by military operations are most likely in the northwestern part. Military operations also occur in the wider Black Sea, including with naval and aerial drones which are used for military operations in the eastern Black Sea. Military operations targeting Russian and Ukrainian coastal military infrastructure or related equipment have included attacks against Russian and Ukrainian port infrastructure and port cities.

Incidents have also been reported at Ukrainian Danube ports. Further attacks cannot be ruled out, but these are less likely than in Ukraine's larger ports. Direct targeting of merchant ships is unlikely, even though two vessels were apparently deliberately targeted in 2024. Collateral damage to ships in Ukrainian ports or in the vicinity is a greater concern. Vessels may be damaged when ports or surrounding cities are targeted by Russian missile and drone attacks.

Warnings about and sightings of naval mines, particularly in the western and northwestern Black Sea, occur infrequently. Some incidents have impacted maritime operations, with demolitions and similar future incidents possible as far south as Turkey.

Power outages occur throughout Ukraine and can impact port operations on short notice. Further likely implications for maritime operations include complications with crew changes, with known cases based on nationality and operational impact by sanctions targeting trade with Russia.

The Ukrainian Black Sea 'humanitarian' corridor and participating Ukrainian Black Sea ports are operational in accordance with the IMO Circular Letter 4748. The corridor is relatively secure to use, although the general security situation in Ukraine is dictated by the ongoing war. The situation remains highly volatile, local operational differences and issues should be expected.

Two incidents involving merchant ships in 2024 underlined that Russia is prepared to deliberately target commercial ships en route to or from Ukraine in specific cases. Given that Russia had previously announced that any ships travelling to Ukraine's Black Sea ports will be viewed as possibly carrying military cargo, as was claimed with the two targeted vessels, similar incidents remain possible. The threat highlights the Russian focus to impact traffic to Ukrainian Black Sea ports. Furthermore, Russia has not withdrawn the prohibition of navigation north of 45-21N, announced at the start of the war in February 2022.

The Ukrainian defence ministry has also announced that Ukraine would consider all ships travelling to Russian Black Sea ports as potentially legitimate targets, likely in response to the Russian announcement. It is unclear to what degree Ukraine is prepared to act on this statement. The overall security situation can change at short notice.

Other threats in the Black Sea include GPS spoofing and jamming, fraud and corruption as well as smuggling. Politically charged demonstrations can also impact regular operations in coastal countries, although these are not known to directly target the maritime sector.

Summary and forecast

Events in January underlined the uncertainty of future negotiations about a ceasefire or even a peaceful settlement. The uncertainty is partly due to military developments on the battlefield, where Russian forces have increased the territory they occupy in Ukraine, albeit apparently at a great cost to their own forces. At the same time, Ukraine's ability to continue the fight against Russian forces is already somewhat undermined by the ambiguous messaging from the Trump administration in the US.



Ukrainian president Volodymyr Zelenskyy during the Ukraine Contact Group meeting in Ramstein (Germany) in January 2025 (Photo: Ukraine Presidential Office)

While it remains possible that some form of ceasefire can be negotiated in 2025, it is more likely to happen during the second half as both Russian and Ukrainian forces and political powers seem willing to continue the war for the foreseeable future. While both Moscow and Kyiv have signalled

interest in talking, there is no consensus on what the talks should be based on, let alone the objectives, and any future position taken by the US prevails as a determining factor in the war.

Given the current Russian and Ukrainian ability to continue the war, both in their own way to achieve their own objectives and advantages, it is most likely that it will be future political and diplomatic developments which will influence any breakthroughs.

Russian attacks on Ukrainian civilian infrastructure, particularly against power generation and energy distribution networks, are likely to continue. Attacks on port or other maritime infrastructure cannot be ruled out. Similarly, Ukraine is likely to continue targeting Russian oil-related infrastructure to weaken the Russian economy and further their incursion into the Russian Kursk region.

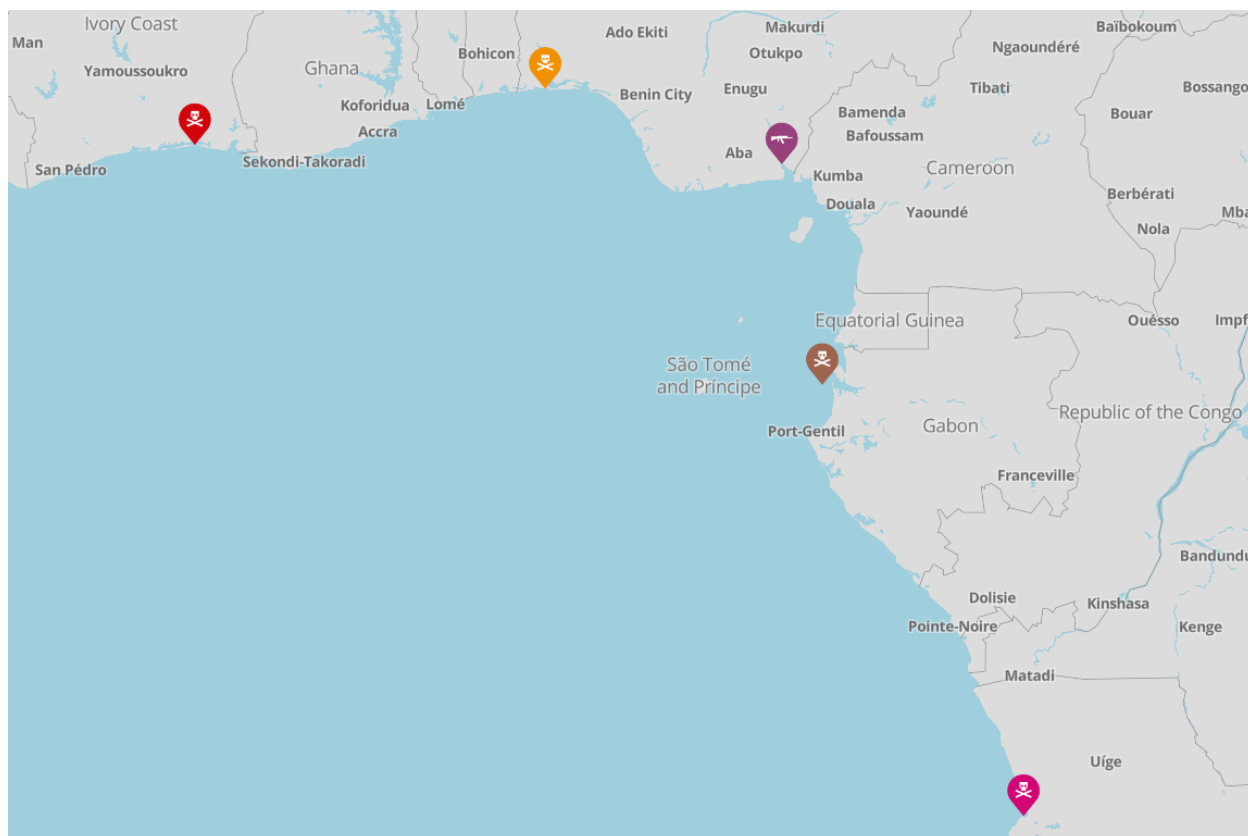
Further information

Risk Intelligence provides a weekly threat assessment specifically for ports in the northern part of the Black Sea. The report covers both the operational and the security situation for various ports.

In addition, the report provides an up-to-date overview of the current situation in Ukraine and the northern Black Sea, including concise information regarding the status of exports of grain and other types of cargoes from Ukrainian ports.

West Africa

Events included in this report occurred between 1 and 31 January 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

2 January – Chemical tanker NORD MAVERICK boarded

Failed theft, Port of Lagos/Apapa (Nigeria)

7 January – Tug SL SANA A boarded

Theft, Luanda anchorage (Angola)

11 January – Marine police craft engaged in firefight

Insurgency, Akwa Ibom state (Nigeria)

13 January – Offshore supply vessel AMETRINE VALOR boarded

Armed robbery, Abidjan anchorage (Côte d'Ivoire)

31 January – Fishing vessel attacked, crew kidnapped

Kidnap/ransom, Off Libreville (Gabon)

Assessment

Inner Gulf of Guinea (Togo to Cameroon)

Attackers operating off the southern and eastern Niger Delta remain the most significant potential threat for merchant ships in international trade operating in the inner Gulf of Guinea. Few attacks have been reported in the past twelve months but the threat was most recently underlined by three incidents in December which included an attempted attack against a container ship and the boarding of an offshore supply vessel.

Attacks against local vessels in or near the Niger Delta frequently highlight the fragile security situation in this part of Nigeria. Such 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 across the Gulf of Guinea as organised criminal groups have concentrated on these much more profitable operations. Virtually all high-profile pirate attacks in the past have been carried out by Niger Delta-based groups.



*Army operatives destroying illegal refining sites
in Bille, Rivers State (Photo: Nigerian Ministry of Defence)*

Nigerian security agencies carry out frequent operations to limit crude oil theft. In January, the military once again announced that dozens of illegal refining sites in several Niger Delta states had been dismantled. In addition, several boats transporting stolen crude oil and illegally refined oil products were also seized. These efforts are part of Operation Delta Sanity, ongoing since January 2024. Similar military operations in recent years have not led to sustainable improvements of the situation which only has a limited effect on neighbouring countries.

Overall, the security situation in the Niger Delta remains fragile. Initiatives to combat crude oil theft and illegal refining are likely to remain largely window-dressing,. 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 across the inner Gulf of Guinea, 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 specifically 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 should be vigilant during river transits to Nigerian ports and terminals.

Outer Gulf of Guinea (Côte d'Ivoire to Gabon)

There were two maritime security incident in January, involving an offshore supply vessel at the Abidjan anchorage (Côte d'Ivoire) and a fishing vessel off Gabon

In the former case, the ship was boarded by one perpetrator who was reportedly armed with a knife. However, he escaped without confronting any crew member. Similar incidents are

frequently reported in ports across the region with perpetrators usually escaping upon discovery by the crew and without any violence. (One similar case was reported involving a tug at the Luanda anchorage in Angola.) However, some cases in recent months have also highlighted that there is a potential for violence when intruders are directly confronted.

The attack against a fishing vessel off Gabon's capital Libreville was possibly connected to another incident off Kribi in Cameroon which took place on 1 February. While details around both cases are currently limited, three crew members from the fishing vessel were reportedly kidnapped, all of them are Senegalese nationals. Considering the overall circumstances – as well as the fact that the same fishing vessel had been involved in a very similar incident off Gabon in 2020 – it is at least likely that this incident was closely linked to other illicit activities at sea. It is unlikely that this was a typical kidnap-for-ransom attack with the primary aim to obtain a significant ransom for the hostages.

The overall security situation at sea has improved in recent years. Nevertheless, 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 issues. 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.

Limited financial and human resources will remain a concern for maritime security agencies across West and Central Africa 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 are 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 outer 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 ship hijackings for the purpose of cargo theft is 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 January 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

Additional information about Houthi-related threats can be found in Risk Intelligence's weekly "Security Threat Update: Red Sea/Gulf of Aden".

8 January – US air strikes reported in Yemen

Military operation, Yemen

10 January – Vessels affected by Israeli air strikes

Military operation, Yemen

12 January – Aerial drones destroyed near merchant ships

Naval operation, Red Sea

24 January – Container vessel reports suspicious approach

Suspicious activity, Persian Gulf

28 January – Suspicious approach reported

Suspicious activity, 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 transiting through the Red Sea.

Attacks against merchant ships by Houthi forces were already at a low level in December with just two incidents reported in the western Gulf of Aden and no incidents in the Red Sea. The number of monthly attacks was below 10 per month since July. The Houthis had likely concluded that their campaign had resulted in a significant reduction of maritime traffic in the region and that even a limited numbers of attacks was enough to maintain deterrence.

In early January, this pattern continued with one incident involving aerial drones being intercepted by naval vessels. US and Israeli forces conducted strikes against Houthi targets in Yemen, the latter affecting merchant ships which were berthed at Saleef/Ras Isa.



An Israeli F-16 in flight (Photo: Social media)

On 19 January, the Houthis announced that they were pausing their campaign, acknowledging the ceasefire in Gaza. They made public statements about no longer targeting vessels calling Israeli ports, with Israeli commercial links other than ownership, and US and UK links. Only ships registered in Israel or with predominantly Israeli ownership would be targeted.

Houthi leader Abdulmalik Al Houthi has also stated that a breach of the ceasefire would mean a resumption of attacks. The Gaza ceasefire deal is structured in two phases. The first phase is meant to last six weeks, giving way to the second phase which includes a full retreat of the Israeli military and the return of remaining Israeli hostages in exchange for Palestinian prisoners. Talks about the second phase must begin in early February. There is uncertainty about the likelihood of a second phase materialising, although Palestinians have begun returning north.

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

The security situation in the Red Sea is now contingent on the durability of the Gaza ceasefire and whether this will be a permanent cessation of hostilities that will satisfy Houthi conditions. The Houthis might be tempted to launch missile strikes directly against Israel, inviting further Israeli or US/UK air strikes. If there are further air strikes, the Houthis might choose to retaliate with their own attacks against merchant ships linked to those countries.

Military action has likely degraded some Houthi capabilities, but they have been able to substantially reduce ship traffic in the Red Sea for a relatively low cost. There are therefore no significant barriers to resuming attacks against merchant ships should they determine that there has not been enough progress in the Gaza conflict.

Gulf of Oman – Persian Gulf

There was one incident reported in January when the US-flagged container vessel LIBERTY POWER was approached by small military craft in the northern Persian Gulf. Despite initial concerns, UKMTO assessed that the incident was related to an ongoing Iranian exercise and that other vessels had experienced similar approaches.

There have been no significant incidents in this area for some months, representing a general de-escalation of tensions after Iran suffered two significant setbacks with the degradation of Hezbollah in Lebanon and the defeat of its ally in Syria. It is likely that Iran's policies are now more directed to the strategic level and the future role of its proxies throughout the Middle East. With a new US presidency, Iran may also face increased economic pressure – such as new US sanctions – and will likely be looking to strengthen its relations in the region (notably with Saudi Arabia) and outside the region (particularly with China).

Despite the absence of incidents in the past six months, 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 commercial disputes (including US-linked vessels). Iran has undertaken these operations to retaliate without substantial risks of escalation.

Forecast

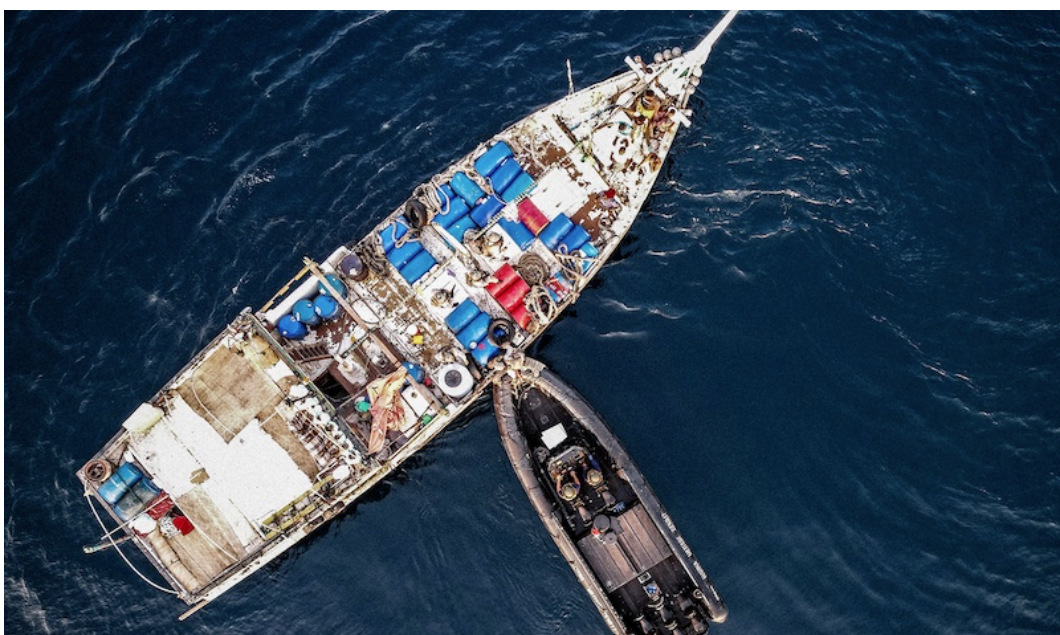
There has been a heightened threat to merchant ships in the Gulf of Oman and Persian Gulf for some time, due to Iran's targeting of certain ships to make broader political statements. Iran is reluctant to escalate its conflict with Israel but has asymmetric options to continue to pressure Israel, including in the maritime environment. Iran will, however, 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. These operations are often on a case-by-case basis and linked to specific disputes. If there are renewed sanctions against Iran, it might be tempted to undertake such operations to retaliate.

Somali Basin and wider Indian Ocean

The China-flagged fishing vessel LIAONING DAPING 578 was hijacked off the Somali coast in December. Analysis by EUNAVFOR and MSCHOA concluded that the vessel was targeted as part of a dispute with local fishermen. Subsequent reporting noted the link to claimed illegal fishing by the trawler and that it was targeted specifically for fishing too close to the coast.

The vessel and the crew were released on 13 January following negotiations that included the Chinese ambassador to Somalia and local clan elders. There was an original demand of a \$10 million ransom, then later reports of a compromise at \$1 million. However, it has not been confirmed whether any ransom was indeed paid.



A boarding team inspects a dhow in the Indian Ocean (Photo: EUNAVFOR)

There have been no other recent pirate attacks. 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 2024.

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. The LIAONING DAPING 578 case also shows that fishing disputes – and the complicated politics surrounding fishing licences in the Somali Basin – might be the primary driver for piracy in the near future, rather than traditional hijackings of merchant ships.

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.

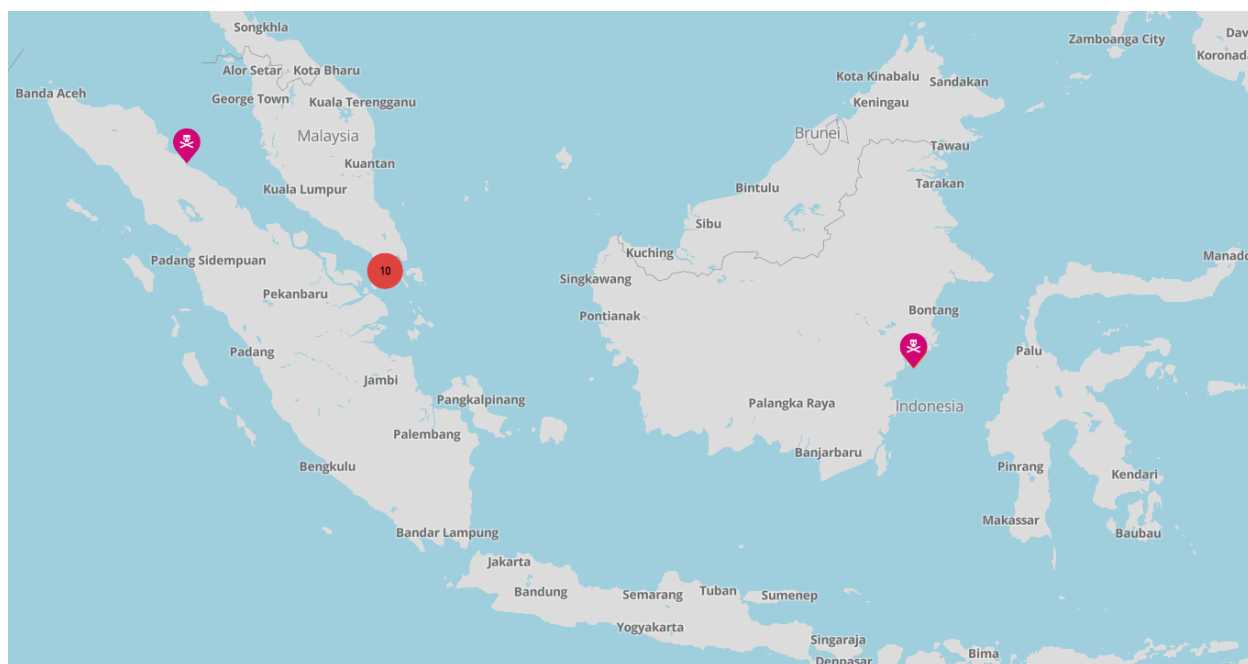
Forecast

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.

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 January 2025, shown on the map below. Further incident details are available on the Risk Intelligence System.



Incidents

8 January – Tanker boarded underway

Theft, Singapore Strait

8 January – Bulk carrier ANABELA boarded underway

Failed robbery, Singapore Strait

9 January – Bulk carrier TRINITY ISLAND boarded underway

Armed robbery, Singapore Strait

16 January – Bulk carrier JOLANDA boarded underway

Failed robbery, Singapore Strait

17 January – Product tanker GOLDEN CURL boarded

Theft, Port of Belawan (Indonesia)

19 January – Bulk carrier GOLDEN CALVUS boarded underway

Armed robbery, Singapore Strait

21 January – Bulk carrier ANGLO RED boarded at anchorage

Theft, Balikpapan (Indonesia)

22 January – Bulk carrier DELFIN boarded underway

Armed robbery, Singapore Strait

24 January – Bulk carrier CHINOOK boarded at anchorage

Failed robbery, Balikpapan (Indonesia)

26 January – Bulk carrier ASIAN ENTERPRISE boarded underway

Armed robbery, Singapore Strait

26 January – Bulk carrier SHI DAI 9 boarded underway

Failed theft, Singapore Strait

28 January – Bulk carrier MANALI boarded underway

Theft, Singapore Strait

28 January – Crude oil tanker BRISTOL boarded underway

Failed robbery, Singapore Strait

Assessment

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

While the wider region experiences regular piracy incidents in the form of thefts and armed robberies, the South China Sea, the Taiwan Strait and also areas northward have attracted attention due to geopolitical developments. Below is an update on this month's piracy activity, followed by an overview of geopolitical events.

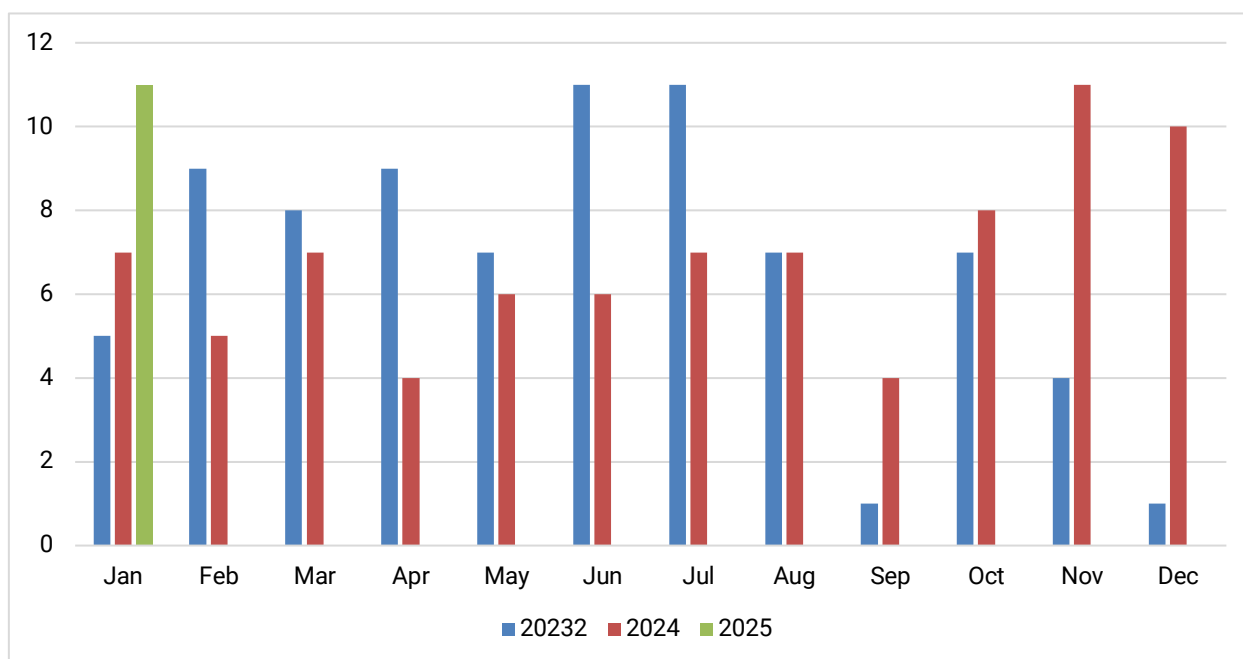
Piracy

Boardings in the form of thefts and armed robberies remain the prevalent threat for merchant ships within these areas. Thirteen incidents were recorded in South East Asia in January. Of these, 69% involved armed perpetrators and 77% took place within the boundaries of the Singapore Strait (where all incidents involved bulk carriers and tankers in transit). One incident was recorded at the Belawan anchorage and two were recorded at the Balikpapan anchorage.

The activity recorded in January illustrates the typical nature of crimes in the region. The trend of perpetrators acting more aggressively towards crew members remains a cause for concern, as illustrated by GOLDEN CALVUS incident during which the chief engineer suffered pain to his wrists from being tied up by the armed perpetrators.

Over the past 12 months, 70% percent of reported incidents in the region have taken place in the Singapore Strait. Of these, 61% 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.



Number of maritime security incidents in the Straits of Malacca and Singapore per month in 2023, 2024 and 2025 to date (Source: Risk Intelligence System)

There have been 86 incidents in the Straits of Malacca and Singapore (SOMS) during the past 12 months. Of these, 74 occurred in the Singapore Strait and 12 in the Malacca Strait. Of the total, 52 involved bulk carriers, 9 involved tankers, while 8 involved barges and other craft in tow. The outliers involved general cargo vessels, heavy lift vessels and OSVs. No incidents in the SOMS have involved container ships or passenger vessels.

Overall, 83% of all SOMS incidents during this period targeted ships underway, all but one in the Singapore Strait. During the past twelve months, 81% 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.

Armed robbers and thieves usually board vessels at night and target supplies and equipment 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 is Indonesia's port of Kuala Tanjung on the Malacca Strait where bulk carriers have been boarded at the anchorage and alongside.

Although most boardings of vessels underway take place in the SOMS, incidents involving vessels underway in the Java Sea and the South China Sea. Most incidents in the region involve bulk carriers and tankers. While reports of boardings targeting oil rigs are infrequent, Risk Intelligence has seen credible evidence of underreporting for these incidents. When such boardings take place, perpetrators generally target unmanned platforms and steal equipment and supplies.

Two tug hijackings in the Java Sea in 2024, 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. The arrests of gang leaders had effectively suppressed such crimes, despite occasional incidents involving small tankers and barges which are locally owned, managed and trading.

As fuel subsidies in the region are being withdrawn, price increases could lead to increased 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 and its affiliates has been suppressed. No cargo vessels have been targeted in the Sulu/Celebes Seas since 2018.

Political developments

The South China Sea, the Taiwan Strait, and adjacent areas northwards are characterized by an absence of immediate maritime threats against commercial ships. There are, however, various political and strategic level undercurrents that might have implications in the future. North Korea is nuclear armed and has a sizable military. The regime wants to protect itself and any escalation could pull in China, Japan, and the US.



Participants at the 10th China-Philippines Bilateral Consultation Mechanism Meeting on the South China Sea in Xiamen City, China (Photo: MFA PRC)

South Korea has recently scaled back its anti-North Korea focus in its 2025 policy plans. The unification and defence ministries have downplayed President Yoon Suk-yeol's policies amid his ongoing impeachment trial. The new policy objectives emphasise stable management of the situation and establishing a foundation for unification. The change reflects South Korea's effort to distance itself from President Yoon's more controversial policies.

North Korea launched several short-range ballistic missiles on 14 January which landed in the Sea of Japan. It was the second missile test in 2025, following an intermediate-range ballistic missile launch on 6 January. This weapon demonstration was conducted ahead of Donald Trump's return to the White House. It is unknown, however, whether North Korean leader Kim Jong Un will change the current anti-US policy.

Following what Taiwanese officials referred to as China's largest deployment of naval and coastguard vessels in three decades, conducted on waters stretching from islands in the south of Japan to the South China Sea in December, a Chinese-owned cargo ship was detained on 7 January by Taiwan's coastguard on suspicion of dragging its anchor over a subsea cable northeast of the island. Taiwan's Chunghwa Telecom reported damage to a subsea cable but its telecom service quickly returned to normal.

Political developments with a potential impact on regional conflicts and specifically on maritime security in South East and East Asia are covered in more depth in the "Asia Strategic Outlook", issued every six months by Risk Intelligence.

In recent years, Beijing has ramped up military pressure on Taipei, which fears China could attempt to sever communication links. While it is unlikely that China will employ such a tactic to add pressure on Taiwan, the incident has further increased current tensions. One week after the Chinese-owned vessel's detention, China's military again conducted joint air and maritime patrols in the South China Sea on 17 and 18 January.

Against the backdrop of ongoing provocations in the South China Sea and the Taiwan Strait by the Chinese coastguard, various high-level talks focused on de-escalation and enhanced coordination between maritime agencies.

For example, Vietnam has followed China's lead by fortifying its own islands in the Spratly Islands but Chinese and Vietnamese coastguard officials met in January to review their cooperation achievements and to plan future cooperation. They agreed to deepen bilateral maritime law enforcement cooperation, maintain security and stability, and set a model for other regional arrangements. This will reportedly lead to an enhanced information exchange to combat illicit activities at sea and involve law enforcement operations in the Beibu Gulf region. Only days after the talks, Vietnamese officials welcomed Chinese naval vessels in Da Nang.

Following these discussions, the tenth meeting of the China-Philippines Bilateral Consultation Mechanism on the South China Sea (BCM) reached consensus on maintaining peace and stability in the South China Sea. China and the Philippines also agreed to strengthen related dialogue and continue to promote practical cooperation in fields such as coastguard, marine science and environmental protection. Evidence of progress was illustrated by an agreement on resupply missions which enabled the Philippines to arrange an uneventful delivery of provisions to its outpost at the Second Thomas Shoal.

On the heels of the BCM meeting, however, Philippines Justice Secretary Crispin Remulla announced that a case relating to irreversible damage to coral reefs and marine biodiversity caused by China's dredging, coral harvesting, and construction of artificial islands in the South China Sea might soon be brought before an international court. The Philippines also lodged a

protest over the presence of China's 165-metre coastguard vessel 5901, reportedly the world's largest coastguard ship. Officials demanded its withdrawal from the Philippines' EEZ.

The chief of Indonesia's Maritime Security Agency also visited Beijing in January for talks with his Chinese coastguard counterparts to boost maritime security cooperation. They agreed on regular meetings at all levels as well as port calls and capability build-up. This coincided with Indonesia establishing full BRICS membership – and amid speculation that Jakarta will play a bigger role in the Global South – as well as an agreement between Indonesia and Japan to expand security cooperation, with Tokyo agreeing to provide high-speed patrol boats.

In an address at the World Economic Forum in Davos, Malaysian Prime Minister Anwar Ibrahim offered observations relating to China's position and related disputes in Asia. He urged that China should not be singled out because of tensions in the South China Sea. As examples, he noted Malaysia's border disputes with Singapore, Thailand and Indonesia, in addition to similar disputes with China. Against this background of several territorial disputes, he noted that such disputes do not hinder amicable diplomatic relations.

These developments highlight ongoing tensions, diplomatic initiatives and complexities in the region. Resolutions to all disputes are unlikely in the short term. While widespread conflict is also unlikely, these ongoing issues are ever present and remain a potential concern.

Forecast

In the coming month, the threat of boardings of vessels underway or at anchor for 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 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.

On the geopolitical front, the threat of military operations disrupting the flow of commercial traffic in the region is assessed as low.

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 high-profile threats such as piracy and armed robbery at sea as well as insurgency attacks. It does not include all other threats to merchant ship operations, e.g. 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.

RiskIntelligence

Risk Intelligence A/S
Strandvejen 100
2900 Hellerup
Denmark

+45 7026 6230
riskintelligence.eu