TÜRKİYE YÜZYILI | **100** TÜRKİYE CUMHURİYETİNİN YÜZÜNCÜ YILI

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Uluslararası Deniz Ticaret Odası (ICS) tarafından Odamıza gönderilen e-posta yazısında;

24-30 Ocak 2024 tarihleri arasında Kızıldeniz ve Karadeniz'de meydana gelen olaylar, mevcut durum, tehdit değerlendirmesi ve ticari faaliyetlere ilişkin tavsiyeleri içeren ICS Risk Değerlendirme raporları ekte sunulmaktadır.

Bilgilerinize arz/rica ederim.

Saygılarımla,

e-imza

İsmet SALİHOĞLU
Genel Sekreter

Ek:
1- ICS Risk Değerlendirme Raporu - Kızıldeniz (23 sayfa)
2- ICS Risk Değerlendirme Raporu - Kuzey Karadeniz ve Rusya (14 sayfa)

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Ek-1

RiskIntelligence

Security Threat Update: Red Sea

24 January 2024

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Security Threat Update: Red Sea

This report provides an overview of recent incidents in the Red Sea as well as an assessments of threat levels for additional attacks against different types of merchant vessels.

Time of latest intelligence included in this report: 24 January 2024, 08:00 UTC.

Recent incidents (Red Sea / Bab el Mandeb area)

Below is a list of incidents in the Red Sea and the vicinity of the Bab el Mandeb which have been recorded on the Risk Intelligence System during the past 30 days. Information includes date, time and a short description of the respective incident. Comprehensive descriptions for all incidents (as well as for older incidents) can be found on the Risk Intelligence System.

25 December	18:00 UTC	'Yemeni navy' orders merchant ship to change course
An entity claiming to be the 'Yemeni navy' ordered a merchant ship to alter course to a Yemeni port.		

26 December	Unknown	Drone activity reported
At least two drones which were allegedly aimed at the Israeli city of Eilat were intercepted over and off the Sinai Peninsula by Egyptian air defences and an Israeli fighter jet respectively.		

26 December	Unknown	US military intercepts drones and missiles
The US naval vessel USS LABOON and F-18 fighter jets from the aircraft carrier USS EISENHOWER shot down 12 drones, three anti-ship ballistic missiles and two land-attack cruise missiles in the southern Red Sea.		

26 December	03:00 UTC	Merchant vessel reports drone activity
The crew on at least one ship reported drone sightings and then two separate explosions around 5 nautical miles from the ship.		

26 December	09:40 UTC	Container ship MSC UNITED VIII targeted
The crew on the ship reported at least two explosions at distances of four and 0.5 nautical miles respectively.		

28 December	15:10 UTC	USS MASON intercepts drone and missile
The US naval vessel USS MASON shot down a drone and an anti-ship ballistic missile in the southern Red Sea.		

30 December	17:30 UTC	Container ship MAERSK HANGZHOU struck
The ship was hit by a missile while steaming northbound in the Red Sea.		

30 December	20:17 UTC	Merchant vessel reports drone activity
The crew on a ship reported a sighting of two drones flying at low altitude. The drones could not be detected on radar.		

31 December	02:47 UTC	Merchant vessel attacked by boats
Three boats approached the ship on the port side and shots were exchanged.		

31 December	03:30 UTC	Container ship MAERSK HANGZHOU attacked by boats
Four boats approached the ship but a boarding attempt was deterred by armed guards on the container ship. US helicopters then engaged the boats and sunk three, killing ten armed men.		

2 January	18:50 UTC	Container ship CMA CGM TAGE targeted
The crew on the ship reported up to three explosions at distances of 1 to 5 nautical miles respectively.		

4 January	Unknown	Drone boat reportedly explodes
According to statements by a high-ranking US military officer, US forces observed a drone boat in the Red Sea which exploded without causing any damages to merchant ships.		

5 January	19:34 UTC	Merchant vessel reports drone activity
The crew on a ship reported a sighting of drones circling the ship. No aggressive advances towards the vessel were reported.		

6 January	06:30 UTC	USS LABOON intercepts drone
The US naval vessel shot down a drone which had been launched from Houthi-controlled areas in Yemen.		

6 January	13:24 UTC	Merchant vessel reports suspicious approach
The crew on a ship reported a sighting of six boats which approached the ship to within a distance of 1 nautical mile.		

8 January	13:24 UTC	Merchant vessel reports suspicious approach
The crew on a ship reported a sighting of two boats which approached the ship to within a distance of 0.5 nautical miles.		

9 January	18:15 UTC	Naval forces intercept drones and missiles
Several warships and aircraft were involved in the interception of 18 drones and three missiles. At least one merchant ship reported suspicious activity resulting from the interceptions.		

9 January	20:00 UTC	Bulk carrier FEDERAL MASAMUNE reports possible attack
The crew on a ship reported a sighting of three boats which reportedly fired two 'rockets' at a distance of 1 nautical mile while a drone was reportedly passing over the ship.		

10 January	23:00 UTC	Merchant vessel reports missile impact in the water
The crew on a ship reported seeing a missile impact the water while transiting through the Gulf of Aden.		

11 January	23:30 UTC	Military strikes against Houthi targets in Yemen
Military forces from the US and the UK, supported by Netherlands, Canada, Bahrain and Australia, conducted joint strikes against several targets in Houthi-controlled parts of Yemen.		

12 January	15:00 UTC	Merchant vessel reports missile attack
The crew on a ship reported a missile impact the water around 500 metres from the vessel when it was transiting eastbound through the Gulf of Aden. (Several media reports identified this vessel as the KHALISSA, a tanker transporting Russian crude. These reports, however, go back to a single source which very likely misidentified the target. Instead, it is very likely that the US-owned bulk carrier OBE GRANDE was targeted.)		

13 January	00:45 UTC	**Military strikes against Houthi targets in Yemen**

Military forces from the US and the UK, supported by Netherlands, Canada, Bahrain and Australia, conducted joint strikes against targets in Houthi-controlled parts of Yemen.

14 January	11:10 UTC	**Bulk carrier ORCHID RISING reports suspicious approach**

The crew on the ship reported a sighting of one boat with four armed men which approached the ship. Given the location of this incident, it is very likely that the boat was part of the Eritrean coastguard.

14 January	13:45 UTC	**US forces intercept drone**

A US fighter aircraft shot down a drone which had been launched from Houthi-controlled areas in Yemen.

15 January	13:05 UTC	**Bulk carrier GIBRALTAR EAGLE struck**

The ship was hit by a missile while steaming eastbound in the Gulf of Aden.

15 January	22:00 UTC	**Bulk carrier ZOGRAFIA reports suspicious approach**

The crew on the ship observed a boat circling the vessel. Armed security personnel fired warning shots, the boat then left the area.

16 January	01:15 UTC	**US forces strike against anti-ship missiles**

US military forces conducted an airstrike against four anti-ship missiles in Houthi-controlled areas in Yemen.

16 January	11:00 UTC	**Bulk carrier ZOGRAFIA struck**

The ship was hit by a projectile while steaming northbound in the southern Red Sea.

16 January	11:00 UTC	**Merchant vessel reports suspicious approach**

The crew on the ship observed four boats approaching the ship to 400 metres. Armed security personnel fired warning shots, the boats then left the area.

17 January	03:30 UTC	**Merchant vessel reports suspicious approach**

The crew on the ship observed eight boats following the vessel. No aggressive actions were reported.

17 January	17:35 UTC	**Bulk carrier GENCO PICARDY struck**

The ship was hit by a drone while steaming eastbound in the Gulf of Aden.

17 January	20:59 UTC	**US forces strike against anti-ship missiles**

US military forces conducted an airstrike against 14 anti-ship missiles in Houthi-controlled areas in Yemen.

18 January	12:40 UTC	**US forces strike against anti-ship missiles**

US military forces conducted an airstrike against two anti-ship missiles in Houthi-controlled areas in Yemen.

18 January	18:00 UTC	Product tanker CHEM RANGER targeted
The ship was attacked while steaming eastbound in the Gulf of Aden.		

18 January	18:33 UTC	Merchant vessel reports drone activity
The crew on a ship reported a sighting of four drones in the Gulf of Aden. One of the drones hit the water at a distance of approximately 800 metres from the ship.		

19 January	15:45 UTC	US forces strike against anti-ship missiles
US military forces conducted an airstrike against three anti-ship missiles in Houthi-controlled areas in Yemen.		

20 January	01:00 UTC	US forces strike against anti-ship missile
US military forces conducted an airstrike against one anti-ship missile in a Houthi-controlled area in Yemen.		

22 January	20:59 UTC	Military strikes against Houthi targets in Yemen
Military forces from the US and the UK, supported by Netherlands, Canada, Bahrain and Australia, conducted joint strikes against several targets in Houthi-controlled parts of Yemen.		

23 January	09:38 UTC	Merchant vessel reports drone activity
The crew on a ship reported a sighting of at least one drone while transiting the Bab al Mandeb.		

23 January	23:30 UTC	US forces strike against anti-ship missiles
US military forces conducted an airstrike against two anti-ship missiles in Houthi-controlled areas in Yemen.		

Current situation

Following the attacks and attempted attacks against civilian and naval vessels in the southern Red Sea and the Gulf of Aden since November, US and UK military forces – supported by Australia, Bahrain, Canada and the Netherlands – began to conduct strikes against targets in Houthi-controlled areas of Yemen during the night from 11 to 12 January (local time). Several additional strikes have been conducted since under Operation Poseidon Archer. For political reasons, this operation is separate from the US-led Operation Prosperity Guardian which is aimed at deterring and defending against further attacks against commercial shipping.

Direct military action against targets in Houthi-controlled areas of Yemen followed a joint statement on 3 January. This document was co-signed by Belgium, Denmark, Germany, Italy, Japan, New Zealand, Republic of Korea and Singapore.

In various statements, the US and other governments have stated that Houthi attacks against merchant ships have been 'indiscriminate', yet this conclusion is not supported by available evidence. Based on an analysis of all recorded incidents since November – and considering military strikes against Houthi forces – Risk Intelligence assesses that the threat to merchant ships is closely linked to individual characteristics. Houthi forces are very likely to continue selecting specific targets rather than engage in indiscriminate attacks against civilian shipping.

Vessel type	Threat type	Threat level
Vessels specifically linked to Israel through ownership, port calls, trade with and/or commercial relationship between Israeli companies and owners/operators	Kinetic attack (missile, aerial/waterborne drone), possibly seizure and detention	**Severe**
Vessels linked to the United States, United Kingdom and other countries involved in Operation Poseidon Archer	Kinetic attack (missile, aerial/waterborne drone), possibly seizure and detention	**Severe**
Vessels linked to other countries participating in or supporting Operation Prosperity Guardian	Kinetic attack (missile, aerial/waterborne drone), possibly seizure and detention	**Elevated**
Other merchant ships in transit through the Red Sea/Bab el Mandeb	Kinetic attack due to misidentification, potential proximity to the above threats ('collateral damage')	**Elevated**

Overall, the threat level to vessels directly owned by Israeli companies had been severe since the beginning of the Houthi campaign. Such vessels therefore largely stopped transiting the Red Sea, even though the recent attack against the bulk carrier ZOGRAFIA – which was en route to an Israeli port – showed that voyages may still occur. Houthi forces then expanded their potential targets and have justified them in some cases with only remote links to Israel.

Military action by the US and the UK has led to another expansion of the Houthis' target pool, underlined by widely-publicised threats particularly against the US. This has resulted in a severe threat level for vessels directly linked to the US and UK as well as the four other countries which are directly supporting military strikes under Operation Poseidon Archer.

Several attempted and successful attacks against US-owned vessels have underlined the threat level and shown that Houthi forces retain the capability to strike merchant ships. In addition, they have underlined that attacks are not limited to the southern Red Sea where Houthi forces control a large portion of the Yemeni coastline as some ships were targeted and even struck in the Gulf of Aden.

For merchant ships linked to other countries taking part in or supporting Operation Prosperity Guardian – as well as for all other commercial vessels – the threat level is assessed as lower but still Elevated.

For vessels related to countries taking part in Operation Prosperity Guardian, this is largely due to the potential for kinetic attacks in lieu of other potential targets for Houthi forces. However, considering their careful selection of targets – which is in line with broader political ambitions – this is currently unlikely. For vessels not related to countries taking part in Operation Prosperity Guardian, this is largely due to the potential for merchant ships passing through the Red Sea suffering from collateral damage due to misidentification, proximity to kinetic attacks or proximity to interceptions of drones and missiles by military forces.

Finally, it is vital to consider that this remains a highly dynamic situation. Risk Intelligence strongly recommends all stakeholders to closely monitor the situation. Updates regarding incidents as well as a constantly updated assessment of current threat levels is also available through the Risk Intelligence System.

Background

Starting with the seizure of the GALAXY LEADER on 14 November, Risk Intelligence has identified 25 targeted attacks by Houthi forces against individual vessels in the Red Sea/Bab el Mandeb/Gulf of Aden area. This is lower than the number of attacks cited by the US military which does not provide an overview to show incidents classified as 'attacks on commercial vessels'. Interceptions of drones and missiles were possibly counted as additional attacks but this remains speculation without any evidence. Drones and missiles may have been used to target warships or merely used as a "show of force" in at least some of the interceptions.

Looking at all 25 attacks in detail, no preference for attacks against southbound or northbound vessels can be identified (see Figure 1).

Figure 1: Number of attacks against merchant ships passing through the Red Sea/Bab el Mandeb/Gulf of Aden area since Nov. 2023 by direction of travel (Source: Risk Intelligence).

While it is possible to identify a slight preference for attacks during daylight hours (see Figure 2), it is far from impossible for Houthi forces to identify targets during hours of darkness and carry out missile or drone strikes against them.

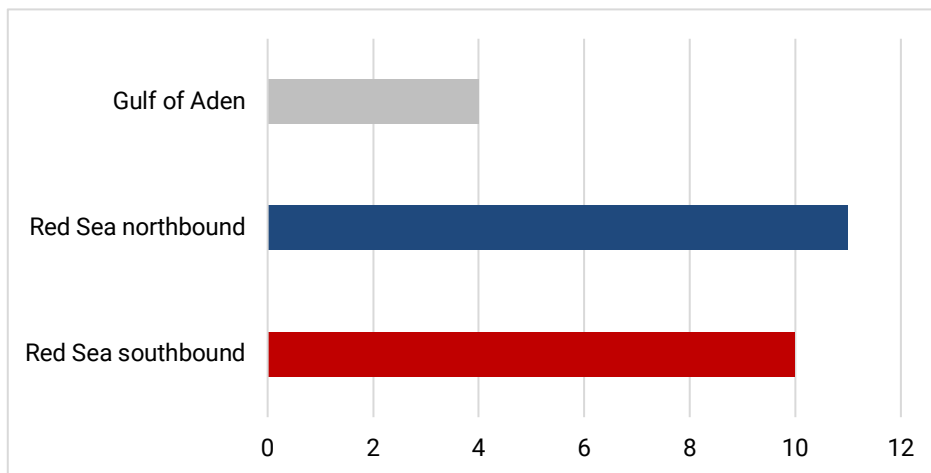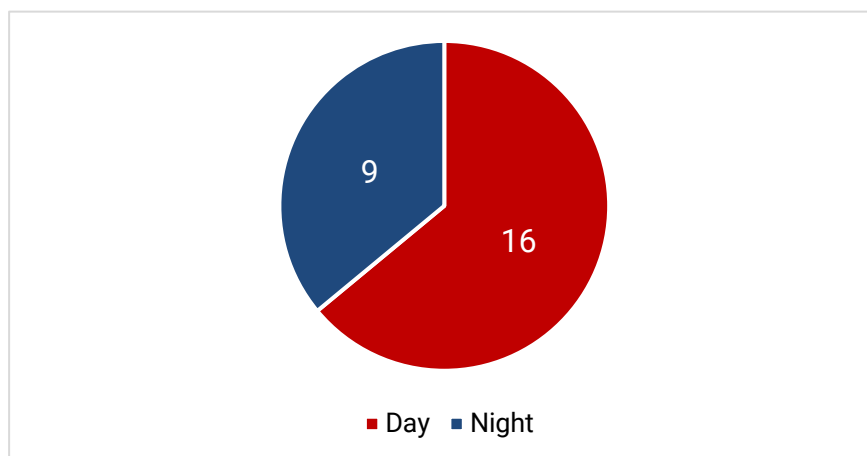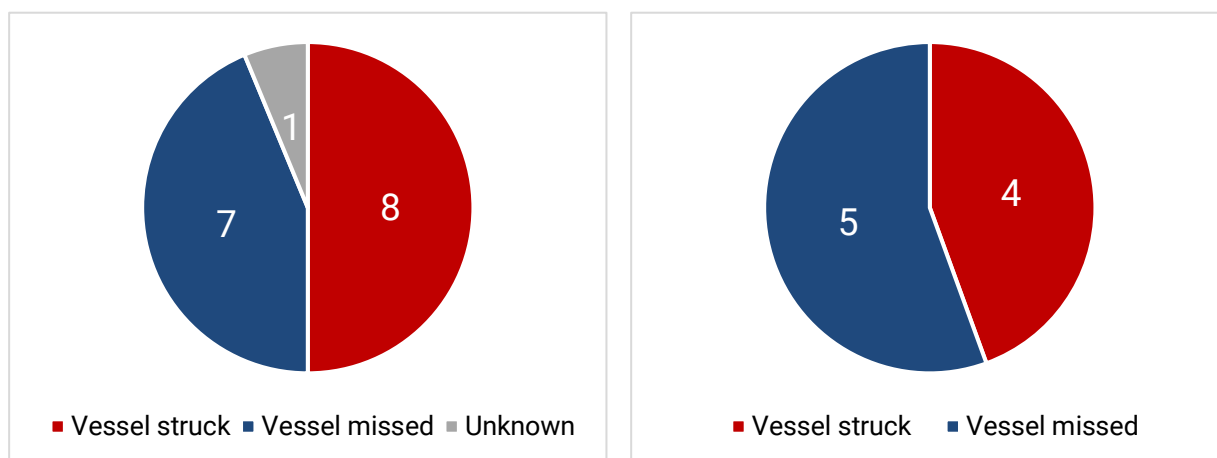*Figure 2: Number of attacks against merchant ships passing through the Red Sea/Bab el Mandeb/Gulf of Aden area since Nov. 2023 by time of day (Source: Risk Intelligence).*

Moreover, this should not lead to the conclusion that transits at night are significantly safer). Of the nine ships targeted during hours of darkness, four were actually struck (see Figure 3b). For

daytime attacks, eight of 14 ships were actually hit by a drone or a missile (see Figure 3a). In one case, it is unclear whether the ship was actually struck but the vessel was very likely not targeted directly. It is possible that the ship was struck by debris from an intercepted missile or drone; no significant damages were reported after this incident.

Number of attacks against merchant ships passing through the Red Sea/Bab el Mandeb/Gulf of Aden area since Nov. 2023 during daytime (Figure 3a, left) and at night (Figure 3b) (Source: Risk Intelligence).

Overall, maritime traffic in the southern Red Sea has decreased steadily since mid-December and is now at around 60% of Bab el Mandeb transits compared with the previous year. Less than 10% of ships passing the Bab el Mandeb are following naval recommendations to disable AIS.

Moreover, the threats in the Red Sea and the Gulf of Aden have led to a noticeable increase in incidents that are perceived as suspicious by seafarers, including in the larger region outside the Red Sea and the Gulf of Aden. Reports about such incidents should be strongly encouraged. At the same time, it is vital to thoroughly assess all reports to identify particular areas of concern.

The background to the current situation is the civil war in Yemen. Since 2015, the Houthis in the northern part of the country have fought against the Saudi and UAE-backed government in southern Yemen. Iran has supported the Houthis during the conflict. Houthi forces have previously targeted Saudi and UAE vessels in the Red Sea with anti-ship missiles and drones (aerial and waterborne). They have also attacked Saudi ports and naval vessels in the Red Sea as well as oil industry targets in southern Yemen, Saudi Arabia, and the UAE.

In September, the Saudis and the Houthis were assessed to be close to a peace agreement that would involve financial and economic concessions to the Houthis in exchange for peace. Neither side wants to jeopardise a potential deal. The threat level for direct attacks against facilities in Saudi Arabia and the UAE is therefore low. In addition, Saudi Arabia has so far refrained from criticising the Houthis for attacks against merchant ships which is a noticeable difference from Saudi rhetoric in the past. Moreover, these attacks do not appear to have led to an interruption of Houthi-Saudi negotiations although it is impossible to assess when a final agreement will be signed, given the maximalist approach by both sides.

Guidance on commercial operations

Ship transits

Several shipping industry organisations have published the "Interim Industry Transit Advice, Southern Red Sea, and Gulf of Aden – 15 December 2023". Among other information, the document includes considerations about routing and vessel hardening. Combined Maritime Forces have also issued a guidance document on 23 December 2023.

Both documents are available via www.maritimeglobalsecurity.org.

Vessel registration and incident reporting

It is strongly recommended for all merchant ships transiting the Western Indian Ocean, the Somali Basin, the Gulf of Aden, Gulf of Oman and the Red Sea to register with UKMTO and the Maritime Security Centre - Horn of Africa (MSCHOA). Any incidents or suspicious activities should also be reported to UKMTO and MSCHOA.

Contact details UKMTO

Email: watchkeepers@ukmto.org
Phone: +44 2393 222060
Website: www.ukmto.org

Contact details MSCHOA

Email: postmaster@mschoa.org
Phone: +33 298 220 220 or +33 298 220 170
Website: www.mschoa.org

If a vessel is under attack, **US naval forces in Bahrain** are able to coordinate assistance.

Phone: +973 1785 3879

Combined Maritime Forces also recommend ignoring VHF calls by "Yemeni navy" with instructions to alter course to Hudaydah or other locations in Yemen. When merchant ships are contacted, masters are advised to continue the voyage and call for a coalition warship on VHF Channel 16, stating current location, situation and intentions.

In addition, vessel operators are advised to contact the respective flag state for additional guidance or requirements regarding incident reporting procedures.

Mitigation measures

Risk Intelligence strongly recommends merchant ship operators to assess whether the respective vessel has been owned or managed by Israel-affiliated companies in the past. Such information may not have been updated in publicly available databases and could lead to misidentification of current commercial links with Israel.

Prior to voyages through the Red Sea and the Gulf of Aden, ship operators should conduct a thorough ship and voyage-specific threat and risk assessment in line with shipping industry best practices. In addition, the following measures should be considered:

- Constant monitoring of the security situation, enabling vessels to avoid locations with recent or ongoing incidents.
- Introduction/update of contingency plans on the company level to address the possibility of seafarers being injured, killed or kidnapped during a security incident. The plan should include contingency and emergency plans; appropriate drills should be completed.
- Crew briefings and scenario drills based on a valid and relevant anti-attack plan to ensure that incidents are reported and alarm is raised without delay when required. Drills should include scenarios with major damage and casualties.
- Enhancement of firefighting, evacuation and damage control procedures, taking into account the possibility of significant damage as a result of direct targeting or collateral damage.
- Enhancement of medical equipment to deal with multiple casualties.
- Emergency contacts placed readily available on the bridge.
- Bridge team briefing regarding hailing/harassment via VHF, prepared responses and immediate contact with naval forces in the respective area. (Local authorities' calls on VHF may be an act of spoofing or even targeting, underlined by several incidents in recent days which involved self-proclaimed 'Yemeni authorities' or the 'Yemeni navy' ordering merchant ships to alter course.)
- Preparation of citadel with emergency provisions and functioning satellite phone.
- Depending on individual circumstances, embarkation of armed guards may be useful to mitigate specific risks, specifically in relation to the threat of boardings from small boats (e.g. Houthi forces, Somali piracy). However, the threat of direct targeting by missiles, aerial or naval drones used by Houthi forces in Yemen (southern Red Sea / Gulf of Aden) cannot be mitigated by embarkation of armed guards.

In general, existing BMP5 recommendations have been developed to deter piracy. While the guidance included in BMP5 is relevant to deter illegal boardings, it offers virtually no mitigation against current threats such as attacks by missiles, drones or – potentially – waterborne IEDs ('drone boats').

Ship operators should also consider to issue specific voyage guidance for transits through the Red Sea and/or the Gulf of Aden. This guidance should consider specific scenarios (e.g. aerial or waterborne threats, hailing on VHF) and include actions for the crew to minimise the impact of any security incident.

Red Sea – threat assessment

Following the recent incidents in the southern Red Sea and the Gulf of Aden related primarily to Houthi forces, there is now a significant threat to merchant ships linked to Israel through a variety of commercial relationships. Although threats will vary on a case-by-case basis, the overall threat level for these vessels is now assessed as severe for vessels linked to Israel through ownership and severe for vessels linked through other commercial relationships including port calls. Threats against vessels linked to the US and UK and other countries involved in direct military strikes against Houthi forces are severe. This reflects the escalation in violence in early January, such as the launch of strikes on Houthi targets by the US-led Operation Prosperity Guardian on 12 January 2024, which is likely to expand the scope of vessels considered as "legitimate targets" by the Houthis. The threat level for all remainder vessels, those not linked to Israel or nations directly involved in strikes against Houthi forces, is assessed as elevated.

The increased threat is a result of the Israel/Gaza conflict and Houthi actions against Israel-linked vessels. Naval vessels have intercepted drones and missiles intended for Israeli targets, or against the naval ships themselves.

The situation is evolving as the list of possible targets is expanding. Links to Israel may now be port calls by the respective vessel, owners/operators conducting trade with Israel in general or owners/operators being in commercial relationships with Israeli companies. While the threat level to vessels directly owned by Israeli companies is assessed as even higher, it should be noted that virtually no such vessels are currently transiting the Red Sea. Houthi forces have therefore significantly expanded their potential targets, including the categories mentioned above.

At the same time, it is important to highlight the increased threat of collateral damage, particularly in the southern Red Sea with dense maritime traffic. It is very likely that Houthi forces have missed their intended targets on several occasions in recent days, increasing the potential for unintended strikes against other merchant ships. Moreover, this is a highly dynamic and evolving threat which must be monitored closely in light of ongoing incidents.

Maritime security in the southern Red Sea is also affected by the conflict in Yemen as some fighting between the Houthis and the rival government supported by the Saudi-led coalition continues. The maritime dimension to this conflict is limited. Ceasefire talks in 2022 saw a substantial fall in cross-border attacks in Saudi Arabia, as well as an improved threat environment during transits through the Bab el Mandeb. Attacks have not taken place in 2023, likely due to progress in negotiations between the Houthis and the Saudi-led coalition. Both sides are unlikely to jeopardise a potential deal. The threat level for direct attacks against port and oil facilities in Saudi Arabia and the UAE is therefore lower while talks are ongoing. In addition, Saudi Arabia has so far refrained from criticising the Houthis for the recent wave of attacks against merchant ships which is a significant difference from Saudi announcements about alleged interceptions of waterborne drones off Saudi port facilities in the past.

There is a dispute between Yemen and Eritrea in the Hanish Islands area, primarily due to fishing. In an incident in June 2021, there was a clash between coastguard/naval forces. In August 2021, several fishing vessels and three Yemeni crew were detained by the Eritrean coastguard near the Hanish Islands. Due to the irregular nature of Yemeni coastguard forces, or the difficulty in

identifying Eritrean craft (which are small speedboats), there are problems with merchant vessels misidentifying small patrol craft from Yemen and Eritrea as pirate vessels. Aggressive enforcement by coastguard vessels, or local craft attempting to warn away merchant vessels, are possible threats in the area. The piracy threat is minimal, even in southern areas, as this area is now considered to be outside the operational range of Somali pirates. The fighting in Sudan is not expected to affect threat levels in the Red Sea.

Threat levels

Refer to the section "Methodology / Definitions" for a detailed definition of the threat level. A concise assessment of all threats listed in the table can be found below.

Threat type	Threat level
Terrorism	Moderate
Piracy	Low
Insurgency and Military Operations	High
Cargo Theft	Moderate
Smuggling	Moderate
Stowaways and human trafficking	Low
Fraud and corruption	Low
Activism	Low

Terrorism

The terrorist threat in the Red Sea is moderate. Terrorist groups in Yemen are active in inland areas and on the Gulf of Aden coast. There are no other significant terrorist actors in other countries bordering the Red Sea. As such, a terrorist attack is unlikely but could take place in proximity such as coastal areas. There is a higher threat of possible insurgency operations against military and other vessel targets by Houthi forces, which could affect merchant vessels in ports or possible transit, and this threat is covered under the Insurgency assessment.

Terrorist operations, whether by al-Qaeda in the Arabian Peninsula (AQAP) or the Islamic State (IS) in Yemen, are possible. Operations by other groups – proxies for other regional states or militia/terrorist groups – are less likely but cannot be ruled out. Their modus operandi would be similar to other cases in the area with the use of explosive-laden boats or projectiles launched from small boats. The Combined Maritime Forces (CMF) guidance on transits reflects current concern over the threat. That there have been no recent attempted attacks suggests some constraints on the intentions and/or capabilities of the terrorist groups. It is likely that the perpetrators were operating out of the southern area of Yemen, where AQAP and IS have access

to the coast, and that any attacks north of Bab el Mandeb are less likely. It is likely that the three incidents noted below were the outcome of specific circumstances rather than an emerging and consistent threat. Recent intelligence suggests that AQAP and IS operations are predominantly based onshore in Yemen; the two groups are rivals in Yemen in particular areas and there have been clashes between them, ruling out joint efforts. The two groups' leaderships are also assessed as severely weakened following a series of strikes by regional and US forces during the last years. There have however been a number of recent clashes between southern militias and remnant AQAP forces, which have chosen to retaliate against provincial forces.

There have been three notable incidents of maritime terrorism in recent years. On 25 October 2016, the LNG carrier GALICIA SPIRIT was apparently attacked just south of Bab el Mandeb, which raised concerns about possible terrorist attacks against merchant ships. Subsequent analysis has suggested that the attack was likely a failed terrorist attack from Yemen. There was a similar attack on the tanker MUSKIE on 31 May 2017. There have been no claims of responsibility for these attacks, and they were denied by the Houthi high command in Yemen. These denials have been assessed as credible. It is unlikely the attacks were carried out by Houthi forces.

Given the modus operandi of the attacks, it is assessed as likely that the attacks were carried out by a small group linked with AQAP or IS forces in Yemen, although other scenarios cannot be ruled out. As well, the product tanker STOLT APAL was apparently attacked by an explosives-laden skiff in May 2020 in the Gulf of Aden (refer to the Indian Ocean area threat assessment), suggesting a threat originating from Yemen. However, an encounter with arms smugglers is a plausible explanation and merchant vessels should be aware of the presence of such skiffs and dhows in this region, where the crew will most certainly be armed. Overall, if any terrorist attacks do take place, they will most likely be directed against tanker vessels and the threat might be higher for these vessel types in some circumstances.

Piracy

The threat of piracy in the Red Sea is low. Somali pirate activities are now largely restricted to the Gulf of Aden and Somali Basin area. Refer to the Indian Ocean piracy assessment for coverage of the threat situation south of Bab el Mandeb. Other reports of suspicious vessels are also likely to be local traffic (particularly armed smugglers who might 'shadow' larger vessels so that they provide cover from detection) rather than pirates, and there have been no confirmed pirate incidents north of the Bab el Mandeb in some time. There have also been other incidents involving armed skiffs, such as attacks in 2018 on coalition warships and convoys in the area west of Hudaydah, which are noted in the Insurgency assessment. Yemeni waters and entry to Red Sea ports are controlled by Saudi and UAE vessels.

The attempted hijack of the CENTRAL PARK on 26 November 2023 has been classified as Piracy by the US government. It is Risk Intelligence's assessment that this attack was not a piracy incident but an incident organised by a political actor in an attempt to disrupt maritime traffic.

There are reports that Eritrean and Yemeni fishermen conduct low-level armed robbery raids against each other. Navigating in waters where there are high concentrations of fishing vessels, typically carrying guns on board, makes it difficult to judge when a small boat's behaviour indicates a developing attack. This has led to a number of reports where ships have believed

themselves under attack or subjected to a suspicious approach. Many of these will have been based on a misinterpretation of normal activity. Eritrea and Yemen have ongoing disputes over maritime boundaries, particularly about fishing rights in the Hanish and Zuqar islands area. It is worth noting that the Yemeni coastguard makes use of irregular forces and that coastguard personnel might not always be in full uniforms or vessels easily identified. Similarly, Eritrean naval/coastguard forces use small speedboats that might be mistaken as other threats. All these craft might manoeuvre in close proximity to vessels in transit. A Russian sailing yacht was detained by armed forces in September 2019 near Harmil Island in what was most likely enforcement action by the Eritrean coastguard.

Insurgency and military operations

The increased threat in this area is a result of the Israel/Gaza conflict and Houthi actions against Israel-linked vessels. "Our eyes are open to constantly monitor and search for any Israeli ship in the Red Sea, especially in Bab al-Mandab, and near Yemeni regional waters," Houthi leader Abdul-Malik al-Houthi was reported saying in early November 2023. On 9 December, a Houthi statement on social media said, "we warn all ships and companies against dealing with Israeli ports." The overall threat level has been reassessed as high to reflect the escalation in rhetoric from the Houthi and their opponents' side, as well as the increase in volumes of ordnance being launched in the area. Overall, the threat in the region is now assessed as high, but should be seen as severe for vessels with indirect or direct links to Israel.

Following the strikes by US-led Operation Prosperity Guardian (OPG) against Houthi targets, it is assessed that the list of what what the Houthis consider legitimate targets is likely to expand. Vessels associated to the nations involved in OPG and operationally delivering the strikes on Yemen are now more likely to be targeted, and the threat for that category of vessels has been assessed as severe. The remainder of the vessels, who are not associated with Israel or the nations conducting strikes on the Houthis, are still exposed to an elevated threat. The Houthis had previously stated that OPG strikes against their positions would result in further retaliatory strikes. Given the Houthis' track record of making good on promised strikes, it is assessed as highly likely that they conduct further strikes in the Bab el Mandab against the now expanded pool of legitimate targets.

The situation is evolving as the list of possible targets is expanding. Links to Israel may now be port calls by the respective vessel, owners/operators conducting trade with Israel in general or owners/operators being in commercial relationships with Israeli companies. While the threat level to vessels which are directly owned by Israeli companies is assessed as even higher, it should be noted that virtually no such vessels are currently transiting the Red Sea. Houthi forces have therefore significantly expanded their potential targets, including the categories mentioned above. The Houthi authorities have made statements on social media claiming responsibility for the attacks and highlighting the connection to trading patterns with Israel, such as the container vessel PALATIUM III on 15 December.

At the same time, it is important to highlight the increased threat of collateral damage, particularly in the southern Red Sea with dense maritime traffic. It is very likely that Houthi forces have missed their intended targets on several occasions in recent days, increasing the potential for unintended strikes against other merchant ships. Moreover, this is a highly dynamic and evolving threat which

must be monitored closely in light of ongoing incidents. This might have been the case with the bulk carrier AOM SOPHIE II that also reported an 'attack' on 3 December.

Houthi attacks started on 19 November when the Bahamas-flagged vehicle carrier GALAXY LEADER was detained by Houthi forces off Hudaydah. The vessel was boarded via helicopter – the first time that Houthi forces have demonstrated this capability – and escorted using patrol craft. A video of the operation posted on social media highlights the 'propaganda' importance of the seizure, with the vessel shown flying Yemeni and Palestinian flags.

This action was followed by a series of missile/drone attacks against two ships directly in the southern Red Sea on 3 December, the bulk carrier UNITY EXPLORER and the container vessel NUMBER 9. While there was a 'strong' link between the UNITY EXPLORER in ownership, the link to Israel for the NUMBER 9 was less clear and may have been based on a previous chartering arrangement. It was expected that strong ownership links would be the primary criteria ongoing, but this has changed – as noted above – as many directly Israel-linked vessels avoided the area. It is assessed that the Houthis (and their Iranian backers) have substantial targeting capabilities and can identify previous links to Israel. Efforts to obfuscate these links may therefore also be identified by the Houthis and the exact criteria being used cannot be known.

It is expected that such attacks will continue, subject to any deterrent response from the US, whose warships might also have been targeted with drones, and pressure applied on the Houthis behind the scenes, either through Saudi Arabia or other intermediaries, or a deal involving Iran, or a change in the situation in Gaza so that the Houthis can claim a propaganda victory Of note, Saudi Arabia has not been publicly active in condemning these attacks and is likely giving the Houthis some leeway in terms of political cover as well as the lack of disruption of Houthi activities.

There have been heightened military tensions in the southern Red Sea area due to the conflict in Yemen for some time. Previous operations were directed against Saudi-led coalition (SLC) vessels and Saudi port areas and oil facilities. The April 2022 ceasefire between the Houthis and SLC ceased maritime attacks against these targets, even after its expiry in October 2022. Current negotiations between Saudi Arabia and the Houthis may result in a political resolution to the conflict. The recent Houthi attacks against Israel are taking place outside of this framework.

The ongoing fighting in Sudan has not had an impact on overall threat levels for the Red Sea. Operations in Port Sudan have continued unabated since the conflict started in April 2023, with the Sudanese armed forces in control of the port city. The war does not emanate threats from the coast and is not expected to take on a maritime dimension in the medium term.

Eritrea and Yemen have ongoing disputes over maritime boundaries, particularly about fishing rights in the Hanish and Zuqar islands area. There was a clash between coastguard/naval forces in the area in early June 2020, although political efforts are underway to prevent this from escalating again. Merchant vessels in transit are unlikely to be affected by any similar incidents. However, it is worth noting that the Yemeni coastguard makes use of irregular forces and that coastguard personnel might not always be in full uniforms or vessels easily identified. Similarly, Eritrean naval/coastguard forces use small speedboats that might be mistaken as other threats. All these craft might manoeuvre in close proximity to vessels in transit.

Cargo theft

Cargo theft does not affect vessels in transit but might take place in proximity in the region and the threat level is moderate. Cargo theft and theft of unsecured ship's stores is likely in many of the ports in the region where threat levels might be elevated. The larger ports such as Jeddah and Djibouti are less likely to be affected. For local conditions in individual locations, refer to the specific port or country assessment.

In Yemen, Red Sea ports are under blockade by coalition forces and subject to strict cargo movement controls under the UNVIM inspection regime. In general terms, nominal standards for ISPS-mandated security protocols and measures are not always in place in ports in this region.

Smuggling

The threat of smuggling is moderate. Vessels in transit are unlikely to be directly affected but smuggling actitivities might be encountered. Smuggling of narcotics and weapons within and via the Red Sea is widespread and persistent, relying both on local vessels ("dhows") rather and commercial trading vessels. In particular, routes are used into Yemen to supply Houthis and other actors with arms, throughout Sudan to deliver arms to Hamas and drugs into a Saudi Arabia. All vessels should be aware of the volume of small boat traffic and that smugglers are typically armed. Smuggler vessels can be mistaken for pirate skiffs or other threats, particularly as they may shadow merchant vessels to use them as cover for their activities. Encounters with smuggling craft are possible, but with only minimal implications - such as having to engage in manoeuvres to avoid their positions. Some skiffs might be carrying explosives or potentially unstable munitions, and all encounters should be regarded with caution.

The threat situation will vary depending on port calls in the region. For example, Saudi has forbidden fruit imports from Lebanon in early 2021, after numerous drug seizures were made from cargoes hiding the drugs in fruit shipments. Overall, there is an increasing prevalence of south-south flow of illicit goods. This may be the traffic of drugs from Lebanon to Saudi Arabia as mentioned, or the smuggling of consumer goods to Egypt which transit aboard regular container vessels but are not destined to European or North-American ports. Djibouti is known to play a major role in smuggling networks throughout the region, given its geography and internal political structure.

In addition, Saudi-led coalition forces will target small craft they believe are involved in smuggling, although are unlikely to do so in proximity to merchant vessels. This is why short transit distances in the southern Red Sea are favoured, such as in the Bab el Mandeb area, and why smuggling craft might use proximity to merchant vessels to avoid being targeted by coalition naval vessels and aircraft. Military assets from other regional powers such as the US regularly interdict smuggling attempts, notably by deploying onboard inspection teams. Local dhows and vessels found carrying illicit goods may sometimes be released with their crew once their cargo has been confiscated. In 2023, the Yemeni Coast Guard has seized vessels smuggling drugs and weapons into Yemen, although there is evidence to suggest that state sponsored smuggling of weapons into Houthi territory through sea has ceased following the Saudi Iran deal in 2023.

Stowaways and human trafficking

Human trafficking poses a limited business continuity threat to vessels in transit. Traffickers are likely to be armed and, as in the case of smugglers, merchant vessels might be 'warned away' or trafficking craft be mistaken for pirate vessels. There have been few reported cases of safety-at-sea situations in the area and in most cases encounters with local craft involved in trafficking have negligible implications. The overall threat level is assessed as low.

It is possible that safety-at-sea situations might arise involving human traffickers when going to the assistance of small boats that appear overloaded and in difficulty. This is especially the case in poor weather conditions when the duty of assisting in the preservation of life at sea can create binding circumstances. There have been some instances of small, overloaded vessels carrying trafficked persons capsizing in the Red Sea. Human trafficking across the Red Sea is most often conducted using dhows, fishing vessels and occasionally small general cargo vessels. Most trafficking takes place in southern areas, especially between Yemen and the Horn of Africa, although there are other local routes. The relatively small distances between either sides of the Red Sea decreases the likelihood that a passing vessel would be forced to provide assistance during a crossing. However, vessels carrying migrants have already sunk, drowning the passengers.

Until the Yemen civil war, the general flow of trafficking was from west to east with well-organised routes in place from Sudan (Port Sudan and Suakin) and Eritrea to Yemen. This route is still being used, with reports of crossings continuing, in the perspective of reaching Saudi Arabia. An estimated 5,000 Eritreans are believed to attempt leaving the country each month for destinations in the Middle East and Europe. Most follow overland routes to the north through Egypt and Libya and thence into southern Europe. Currently there is no real threat to merchant traffic transiting the Red Sea.

Stowaways are less of a threat, particularly as most ship traffic is in transit. For local conditions in individual locations, refer to the specific port or country assessment.

Fraud and corruption

Corruption, bribery and fraudulent practices are significant in this region, although do not affect transiting merchant traffic. Overall, the threat has been assessed as low and should only be a concern for specific port calls or Suez transits. Given poor governance and low income levels, corruption should be expected at several of the ports along the Red Sea. Refer to specific country assessments for local conditions.

Activism

Activism is not a threat to vessels operating in the Red Sea and the threat level is low. Activism is harshly repressed in countries around the Red Sea, limiting the threat it poses to operations in the medium term.

Indian Ocean – threat assessment (summary)

This area covers the western Indian Ocean north of Madagascar and east towards India, including the Somali Basin, Gulf of Aden, and western Arabian Sea. Primary threats are piracy off Somalia, and the conflict in Yemen which has some implications close to the Yemeni coast. Broader regional conflicts might also affect certain vessels in the Arabian Sea or off Oman.

In general, vessels in transit should be aware of the potential to encounter small armed craft in this area, particularly in the Gulf of Aden. These might be fishermen, traders, smugglers, militia or irregular military forces, or military or coastguard patrol craft operating out of southern Yemen or northern Somalia. The boarding of the product tanker CENTRAL PARK in the Gulf of Aden on 26 November 2023 has been assessed as related to Houthi-led actions against Israel-linked vessels.

There is still the potential for pirate operations in the Somali Basin and the Gulf of Aden. The Malta-flagged bulk carrier RUEN was hijacked about 400 nautical miles off the coast on 14 December 2023 and is being held off Somalia at present. On 4 January, the Liberia-flagged bulk carrier LILA NORFOLK was boarded by armed men around 460 nautical miles off Somalia. The crew retreated to the citadel. The Indian navy dispatched a warship to assist while a maritime patrol aircraft overflew the ship early on 5 January and established contact with the crew. A boarding team later found that the perpetrators had left the vessel.

There are certain details of both incidents that are not clear. The cases do show that pirates still have boarding capabilities at significant distances offshore. It is unclear whether these were linked to overall unhappiness by coastal communities over illegal fishing or were opportunistic hijackings to obtain ransoms. There have also been four boardings of fishing dhows off Somalia since November. These are likely linked to illegal fishing in the area, which is an ongoing issue and has been a focus for Somalia in expanding maritime enforcement capabilities. Iranian vessels have been seized in the past and captives were released as recently as 2022 and 2020.

Naval patrols are operational in the area, such as EUNAVFOR's Operation Atalanta. Their mandates include maritime crimes (such as drugs and arms smuggling) as well as countering piracy. The group transit scheme for the Gulf of Aden is also still operational.

Suspicious approaches in the Gulf of Aden over the last 24 months suggest that activity is ongoing and there have been other reports of armed craft that might have been pirates monitoring merchant traffic. The Bab el Mandeb area has also seen a number of small boat sightings recently that are unlikely to have represented a direct threat to vessels. These might indicate pirate or other illegal activity, but this area is also frequented by fishing fleets out of Aden. The Yemeni coastguard has also been more active in this area recently and might be misidentified as a potential threat, particularly as they will approach and hail vessels in transit close to the coast.

The situation in southern Yemen remains unstable and there are multiple political factions with their own militia forces, as well as security forces from Saudi Arabia and the UAE in operation. The trend is for some improvement as peace talks are ongoing and there is some optimism that a permanent settlement might be reached in Yemen after eight years of conflict. Terrorist groups have a limited presence. In general, merchant ships might be caught up in either political disputes or terrorist attacks, which are less likely but still possible, and there is some blurring between the

two. A likely Houthi drone attack took place against the Ash Shihr offshore terminal in October 2022 and against Qena port in November 2022, but there have been no incidents since then, reflecting progress in peace talks.

Current transit advice for the western Gulf of Aden and approaches to the Bab el Mandeb and the southern Red Sea is provided by UKMTO. Combined Maritime Forces (CMF) have recommended the use of the Maritime Security Transit Corridor (MSTC) linking the Red Sea TSS through the Bab el Mandeb and into the Gulf of Aden. The MSTC is the Internationally Recommended Transit Corridor (IRTC) plus the Bab el Mandeb Traffic Separation Scheme and the TSS west of the Hanish Islands, which connects the IRTC and the Bab el Mandeb TSS. Full guidance has been published on the CMF website.

UKMTO operates the Voluntary Reporting Area for the Indian Ocean, administered by the Maritime Trade Information Centre (MTIC)/UKMTO (Dubai). UKMTO acts as primary point of contact for merchant ships and liaison with military forces in the region. Vessels are encouraged to report their positions. MSCHOA manages the EU NAVFOR (EU Naval Forces Somalia and Operation Atalanta) voluntary registration scheme for vessels transiting the area and administers an interactive website that enables EUNAVFOR to communicate the latest counter-piracy guidance to the maritime industry, and for shipping companies to register ship movements through the region. The shipping industry has removed its high-risk area (HRA) designation for the Indian Ocean, effective 1 January 2023, although notes that: "Threat and risk assessments should still be carried out, and best management practices followed to continue to mitigate the risks presented in a changeable and often complex and potentially threatening environment."
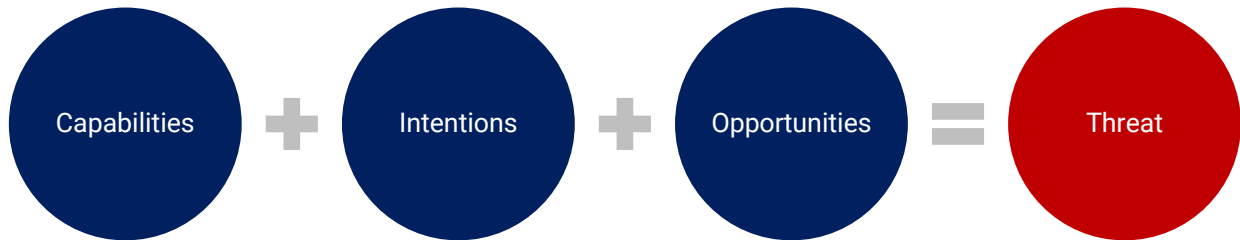
Threat levels

Refer to the section "Methodology / Definitions" for a detailed definition of the threat level. Concise assessments of all types of threats listed in the table below can be found on the Risk Intelligence System.

Threat type	Threat level
Terrorism	Moderate
Piracy	Moderate
Insurgency and Military Operations	Moderate
Cargo Theft	Low
Smuggling	Moderate
Stowaways and human trafficking	Low
Fraud and corruption	Low
Activism	Low

Methodology / Definitions

All threat levels are based on the likelihood of a threat type occurring, with generic consequences described in the relevant sections. All threat levels are based on an assessment of capabilities, intentions and opportunities of potential perpetrators, separated into different categories.

Capabilities **+** Intentions **+** Opportunities **=** Threat

Maritime operators are typically unable to lower the threat level by influencing the underlying variables. However, all variables are subject to change over time, e.g. changes in the intentions or capabilities of potential perpetrators. They should therefore be re-assessed as required.

In an additional step, the threat levels assessed here can be used to identify the risk level for a particular type of operations. Determining the risk level also requires an assessment of the vulnerability and the potential consequence of a particular incident. Appropriate mitigation measures can then be implemented to lower the risk level.

Threat levels

All threat levels mentioned above are assessed based on the likelihood and consequence of a particular threat type occurring. The levels are:

- Low: Not expected in the operational area or in proximity.
- Moderate: Not expected in the operational area but possible in proximity.
- Elevated: Possible in the operational area or in proximity.
- High: Expected in the operational area or in proximity.
- Severe: Commonplace in the operational area or in proximity.
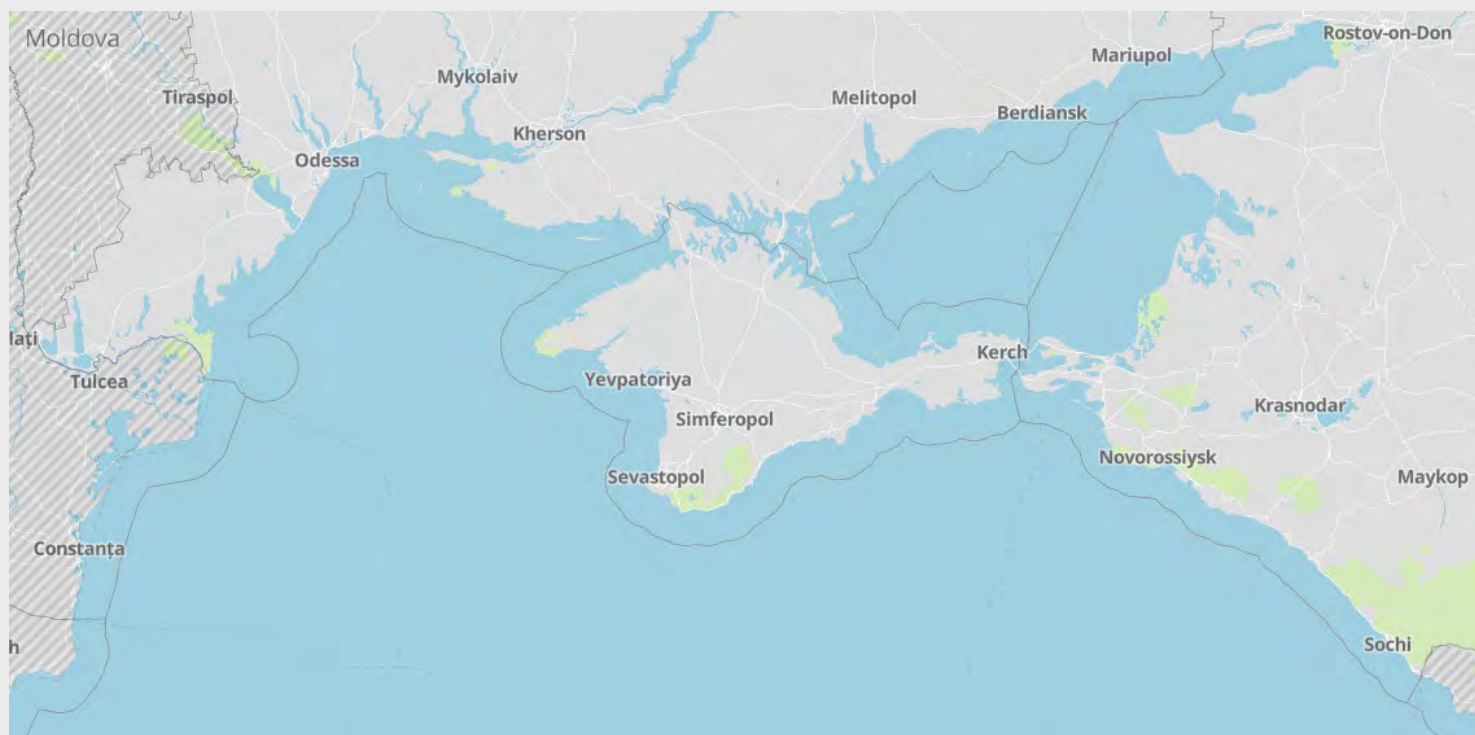
RiskIntelligence

Northern Black Sea and Russia Ports Threat Assessment

Port operations and security overview

Ek-2

Date and time of latest intelligence included in this report: 25 January 2024 – 09:00 UTC

Overview of current situation

Brief update:

Please see back of report for details about incidents recorded during the past week. There has been no change to the overall security picture, in relation to maritime operations in the Black Sea. Russian forces continue targeting Ukrainian civilian infrastructure, mainly in the southern and the eastern regions of Ukraine, where fighting remains the focus for Russian and Ukrainian forces.

A recent report stated that the previously mentioned tri-party agreement between Turkey, Romania, and Bulgaria, regarding mine-clearing operations in their respective waters in the Black Sea, is expected to be operational in April or May. As noted in previous reports, the current level of attacks should be seen in the context of present weather conditions and military related circumstances which are influencing the overall security situation. There is no change to the present threat picture towards maritime operations in the region and the current circumstances are likely to continue in the coming week, as there are no apparent or foreseeable changes to the current situation, neither militarily nor politically or diplomatically.

Ukrainian 'Humanitarian Corridor'

There are no changes to the threat picture for the corridor or the ports connected to it.

Drone and cruise missile paths are known to cross the corridor, and while direct targeting is unlikely, collateral damage from malfunctioning or downed drones and missiles cannot be ruled out.

Russian tactics related to the NW Black Sea and attempts to disrupt any scheduled flow of vessels transiting to Ukrainian Black Sea ports, is still assessed as possible. This may include harassment of vessels, as well as firing warning shots. Such incidents are deemed more likely south of 45-21N and in international waters.

Until some kind of firm security guarantees address the threat of Russian forced inspections of vessels trading in Ukrainian Black Sea and Danube ports, such incidents are assessed to be possible. It should therefore be assumed that there remains an increased threat towards maritime trade in the NW Black Sea and near the conflict area, in particular.

North of 45-21N, Russia may in the worst-case scenario, sink merchant vessels. While this is unlikely, especially due to international condemnation in such a case would be widespread.

Although attacks against Russian Naval capabilities have been reported from time to time, Russia still maintains a strong presence in the Black Sea. However, under current circumstances, it is unlikely that Russian Naval capabilities can uphold any blockade or strict inspection regime, especially with Ukrainian anti-ship capabilities in place throughout the region. Any overt rhetoric of threats in the area, real or not, are still assessed as a likely attempts to influence threat perception and willingness to undertake voyages into the corridor north of 45-21 in particular, as well as in the wider Black Sea.

The recent announcement of a tri-party memorandum of understanding, between Turkey, Romania and Bulgaria to combine forces for mine-clearance operations is positive, but also underlines that the threat of drifting mines remains a serious concern. Russia has extensive capabilities to covertly release mines or other munitions into the corridor, using submarines. This would allow for plausible deniability, and the argument that the damage was done by Ukrainian mines. The use of submarines will likely also be influenced by the risk to surface vessels due to Ukrainian anti-ship capabilities.

The coordinated insurance mechanism between Ukraine and a syndicate of United Kingdom marine insurers is intended to reduce the war-risk premiums when transiting to Ukrainian Black Sea ports of Odessa, Chornomorsk and Pivdenny and Ukrainian Danube ports.

Black Sea:

There were no developments during the past week that changed the current threat picture in the Black Sea. Local weather conditions are known to have impacted operating in the Black Sea and previous stormy weather did raise concerns about how this might impact on the drifting mines, as the weather is likely to dislodge more mines from their moorings or disperse already drifting mines, over a greater area. Russian forces continued to target general Ukrainian infrastructure and Ukrainian forces continued to push toward achieving strategic and military objectives.

Ukrainian forces are likely to continue the pressure on the Crimean Peninsula and likely to continue the focus of gaining more firm control of the maritime domain. This will likely continue to be a key priority for them, as this will provide more definite security circumstances for any future shipping corridor to Ukrainian Black Sea ports. Russian forces are likely

to continue to focus on countering the Ukrainian efforts.

A chart of the announced 'humanitarian corridor', as published in the Annex to the IMO Circular Letter No.4748, can be found in Annex 2 of this report.

Although generally assessed as less likely, Ukrainian forces may target cargo vessels operated by, or sailing for, the Russian military. Examples of this have included oil tankers escorted by Russian naval vessels at sea and near the Kerch Strait. However, Ukraine is very unlikely to target regular civilian shipping, although collateral damage near Russian ports and infrastructure is possible.

Attacks on Ukrainian ports and their associated cities are known to previously have affected the port power supply, which in turn has halted operations. Given the constant unpredictability, similar future disruption cannot be ruled out. The threat from military operations, particularly in the NW area, but also the wider Black Sea area, is still considered severe. This includes the continued threat of reported sea-mines in the Black Sea and various military operations and engagements in the NW Black Sea which have become more common after the Russian withdrawal from the BSGI. This includes frequent reports of the movement of UKR naval drones and special forces, and Russian assets patrolling to counter these movements. Additional details about recent incidents can be found at the back of this report.

The Ukrainian military continues to launch operations targeting Russian forces in the south and east of Ukraine including in occupied Crimea – indicating a likely intention to increase control of the area.

The Ukrainian air-raid alerts are reported throughout Ukraine on daily. The continued high likelihood of collateral damage to vessels increases with the ongoing intensity of the Russian aerial bombardments of Ukraine.

The announced signing of the Memorandum of Understanding by Bulgaria, Turkey and Romania for combined efforts to undertaking counter-mine activities, is a significant step towards dealing with the issue. It is understood that the command of the Task Force (Mine Countermeasures Naval Group Black Sea – MCM Black Sea) will be on a six-month rotation and only involve capabilities from the three states. As noted earlier in this report, the local weather conditions raise the concerns for drifting mines as storms in the area often lead to new sightings as mines become untethered from anchors and begin to drift. While a connection to the war is likely, exact origins of individual mines are uncertain. There is also doubt about the potential number of mines deployed in the Black

Sea, but the sightings and ongoing efforts of disposals, highlight that mines are a threat.

The current threat picture for the whole Black Sea remains influenced by both Russian and Ukrainian efforts to assert control and affect shipping. Conflict related implications when operating in the Black Sea are therefore likely to continue – with continued increased naval presence and activity, congestion and delays when transiting the regional straits and rivers, congestion at other regional ports due to volume of diverted traffic, impact of sanctions on trade to and from Russia, and complications with crew changes.

Sea of Azov:

The Sea of Azov is still assessed to be limited in access for normal commercial maritime traffic.

The Ukrainian Sea of Azov ports (Mariupol and Berdyansk) are still controlled and operated by the Russian military and occupation authorities. While the Russians have previously announced the ports to be open and being rebuilt – with recent claims of increased traffic – the actual operational state is unclear. Vessels given access into these ports are known to have transported stolen Ukrainian cargo, most notably steel and metal products, as well as grain. Naval movements into the ports are likely to occur. Incidents of long-range attacks and sabotage in both cities are known, but unverified.

The Ukrainian authorities have previously stated that they are monitoring vessels going to occupied Ukrainian ports, in the Sea of Azov, and that these vessels are viewed as legitimate military targets.

Traffic is known to be halted on the Kerch Strait bridge, a coveted target by Ukrainian military, as the recent 26 December incident showed, and similar situations are likely to occur again in the event of a future attacks or likelihood thereof. Russia has announced that vessels which have loaded anywhere outside of Russia, will not be permitted to pass through the Kerch Strait. Disruption and delays to transits of non-Russian-flagged vessels are known to occur. Direct targeting of Russian (proper) ports, port cities, or nearby areas is generally considered unlikely, although the potential targeting of Russian Black Sea ports is assessed to be more likely. Russian Black Sea ports are understood to be operating at ISPS level 2.

BSGI: Black Sea Grain Initiative

BSGI remains suspended. However, Ukraine's ambassador to Turkey, has previously stated that negotiations are ongoing, attempting to find a future format. No further details were given. Given current

political and military circumstances, a new format seems unlikely in the near term.

Information regarding past vessel movements and goods transported, as part of the BSGI, can be found on the UN dedicated website below[1].

https://www.un.org/en/black-sea-grain-initiative/vessel-movements

Ukraine:

Port information is located in the port table.

Local weather conditions continue to impact both maritime and military operations. Similar to previous weeks' reports, options to increase the security for a future Ukrainian Black Sea export corridor are still understood to being explored – both in terms of funding but also additional military equipment. Although Ukrainian ports remain shut for normal operations, Odessa, Pivdennyi (formerly Yuzhny) and Chornomorsk, are handling operations connected to Ukrainian 'humanitarian corridor'. Any specific impact of reported attacks on Ukrainian Black Sea and Danube port infrastructure, following individual incidents, is uncertain, though targeting is likely to continue to complicate operations to varying degrees.

Ukrainian Danube ports are reported open and operating, although it is understood that an ongoing shortage of pilots and local weather conditions does cause operational disruption and delays. Future Russian attacks targeting the Ukrainian Danube ports are likely. Attacks targeting Ukrainian Danube port infrastructure has been occurring since the closing of the BSGI, with Russia significantly intensifying drone attacks against the Ukrainian logistics infrastructure near the river. Attacks at night are common, and anti-air defenses in and near the ports often work through the night against Russian drone attacks. Collateral damage to vessels in the ports is possible – either from strikes on the ports, or vessels may be hit by stray or disabled drones.

Russian long-range missile and drone attacks against critical infrastructure, are likely to continue. Russian forces are also likely to increasingly bomb heating and power infrastructure in Ukraine, to put maximum pressure on Ukrainian society, during the winter. Ukrainian authorities claim to be better prepared, compared to last year, but this will likely be a potential issue for future port operations. For

example, in the case of targeting of power and electricity infrastructure may cause power failures.

In case of a dramatic change on the ground, Russia may limit the strategic bombing and use the long-range precision weapons and drones against military targets closer to the front-line.

It is assessed that although grain exports play an important role in funding Ukraine's war effort – and will no doubt continue to do so – any future shipping corridor will likely also be important for importing building-materials for the future rebuilding of the country.

Any future call by the Ukrainian government for additional mobilization of citizens to the armed forces is likely to exempt Ukrainian seafarers although the scale of such a mobilisation is uncertain.

The main efforts of the Ukrainian offensive are still understood to be concentrating in the south and east. In case of a wider breakthrough in Kherson and/or Zaporizhzhia Oblasts towards Crimea and the Azov Sea, Russian priorities regarding operating the ports of Berdyansk and Mariupol may change.

Martial law was extended for 90 days, from 16 November 2023 until 14 February 2024 – with some local night-time curfews in place. All Ukrainian ports are operating at ISPS level 3 in accordance with the communication to the IMO by the Ukrainian authorities.

Russia:

Port information is located in the port table.

Russia introduced a temporary restriction on Ukrainian citizens, which may impact any vessels with Ukrainian crew, going to Russian ports. The Ukrainian effort to attack Crimea and the Kerch Strait in the Autumn of 2023, is likely to have exerted a great deal of pressure against the Russian Navy in the NW Black Sea. Especially attacks on Sevastopol, the historic homeport of the Black Sea Fleet, seems to have had a significant effect, as the Russian navy are reported to have retreated from the port and moved its remaining vessels to Novorossiysk further east. This could give the Ukrainian military more freedom to operate in the NW Black Sea, although Russian aviation and other strike capabilities remain in the area.

Generally, Ukrainian efforts against Russian maritime assets have been focused on degrading Russian capabilities and limiting the room to

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[1] Risk Intelligence is not responsible for third party content.

maneuver in the Black Sea. Such Ukrainian operations have been limited since November due to harsh weather conditions related to the Winter in the Black Sea. Ukraine is likely to return to these types of attacks, once weather conditions in the Black Sea improves. It should be noted, that Ukraine may still conduct missile or air strikes against Russian maritime targets, most likely in Crimea.

The Ukrainian intent to strike at, and the availability of capabilities, to reach Russian targets highlight that the immediate threat towards Russian Black Sea ports has to be taken into account. With the moving of the Russian Black Sea Navy, Ukraine is likely to focus more on strikes to the East of the Black Sea, and ports in this area.

While intended targeting of civilian vessels is still assessed as unlikely, collateral damage or mistaken targeting is possible, by both parties – including a Ukrainian willingness to attack "civilian" cargo vessels operated by the Russian military – such vessels are often sanctioned due to activities related to the Syrian Civil War and the transport of military equipment.

It is uncertain to what degree countermeasures and security will impact operations in Russian ports. However, reports indicate that the Russian authorities have raised security concerns over the fear of UKR naval drones. An example is the port of Feodosia near Kerch, where there now is a ban on entering the waters closer than 1km of the port in small vessels and crafts. This adds to previous reports of gunfire in Feodosia and various reports of drone sightings, which are known to result in the closure of the Kerch Strait Bridge. The actual presence or sightings of drones are uncertain.

Overall, because of the threat to Russian ports, and the increased security, there is a chance that guards and troops will be overly nervous or paranoid about attacks and security incidents. The hyper-vigilant state can lead security personnel to perceive benign actions or individuals as potential threats, thus increasing the likelihood of unjustified use of force – this extends to sailors and vessels.

There are also known reports of Russia sinking some old ferries or similar in the Kerch Strait, as an attempt to create a bulwark against the Ukrainian naval drones. While this most likely won't affect the regular shipping lane underneath the bridge, it highlights that Russia are stepping up security and are taking the threat of Ukrainian drones extremely seriously.

Extra scrutiny against crew, and passengers from the West in Russian ports, has previously occurred. Extra focus is expected against Ukrainian crewmembers, who are required to be brought ashore and questioned by Russian authorities before berthing. Some crews on merchant vessels in the Black Sea, are known to have been questioned on attitude towards Russia and the invasion of Ukraine. Content on phones and electronic devices, as well as messages on social media and other text services may be investigated to establish anti-Russian sentiment.

Reports of activism against vessels transporting cargo to or from Russia are known. This is predominately when vessels with Russian cargo call European or western ports. Similarly, there have been previous incidents of vessels carrying oil and gas products from Russia being targeted by environmental/peace activists at sea or while underway as recently illustrated by the cruise ship calling at Batumi. Port workers and industrial action in the form of refusal to service the vessels once it lands in Western ports, is also likely. Hacktivists targeting companies trading with Russia cannot be ruled out.

Outlook:

The current and immediate outlook for the security situation in the Black Sea region remains unchanged. Ukrainian focus, both politically, in terms of securing further global political support, and funds to sustain its war efforts, but also militarily to attaining more control of security in the maritime domain, will likely continue to be key priorities.

Current regional weather conditions are known to impact both maritime and military operations. Although both commercial maritime and military operations have been impacted, it is assessed that the military operations will attempt to shift tactics, to more weather appropriate, in order to keep the up whatever momentum is possible.

Reported military operations continue to underline the general current threat picture, which is assessed to remain the same for the coming week – with the additional caveat that unknown events may unfold. Any significant changes to the present circumstances are not assessed as likely. Russian targeting of Ukrainian infrastructure, including port facilities, is likely to continue to varying degrees – throughout the country. Russia is likely to continue to attempt to disrupt or discourage vessels transiting the Ukrainian 'humanitarian corridor', although such attempts are also likely attempts to distract the Ukrainian military from their own operations in the NW Black Sea – which continues to indicate an increased focus on establishing area control.

The previous report quoting the Ukrainian ambassador to Turkey that negotiations are

ongoing, to attempt to find a future format for the previous Black Sea Grain Initiative, together with the announced initiative for mine-countermeasures, signed by Turkey, Bulgaria and Romania, and the agreement between Ukraine and a United Kingdom based insurance syndicate, are all positive developments both for shipping but also for general exports and production within Ukraine. However, such arrangements do not, in themselves, change the actual threat picture – for instance, much will depend on the effectiveness of the mine-clearing operations. The volatility in relation to operating in the Black Sea is unlikely to change, as both Ukraine and Russia will attempt to assert dominance and disrupt the activities of the other side as much as possible.

Given the likely continued focus by the Russian military to target Ukrainian port cities and facilities, to keep the pressure on Ukrainian abilities to export their goods – and if the disruption of port operations, due to the shelling, is not considered to be effective enough, additional intensity or other tactics, such as forced inspections or direct attacks on merchant vessels, may become more likely, as it seems the ultimate goal of the Russian efforts are to deny Ukraine the income from their exports. Any tacit agreement from the Russians on transits is unlikely unless outside pressure or negotiated separately.

Ukrainian strikes are likely to continue against Russian logistics infrastructure and storage sites to disrupt Russian supply-lines and military operations in Southern Ukraine. Much of this can be focused on the Sea of Azov and Crimea, and future major attacks against maritime infrastructure to keep the pressure on Russian supply-lines the area, are likely.

Although the Russian authorities appear to rule out any future "official" mobilization of Russian citizens, other means are being utilized, such as the legislative changes, or other means in attempts to achieve the same conscription goals.

Future sanctions towards Russia may affect the overall security dynamics of the Black Sea. If further sanctions mount, Russia could still respond by restricting Russian ports for vessels affiliated with or connected to EU/NATO/Western countries or flags. In such a scenario, any effect on vessels in Russian ports is uncertain, although detention of vessels could be a possibility – threats of this have been reported. Russian authorities might do extensive checks and controls of western vessels as a form of harassment.

The war in Ukraine has proven it can take on additional dimensions – examples likely connected sabotage include the Nord Stream 1 and 2 pipeline incidents in the Baltic Sea, in late September 2022 and the Ust-Luga terminal, near St. Petersburg –

this means that additional hybrid-warfare means may be used not just in relation to Ukraine and the Black Sea, but also elsewhere in the world- especially where the international tensions between Russia and the West/NATO are prevalent. These may include, but are not limited to, harassment, espionage, cyberattacks, and sabotage of and against maritime assets and infrastructure. This has the potential to affect maritime security in a negative way.

Annex 1 – Illustration of reported mined areas
Annex 2 – Announced temporary corridor from UKR Black Sea ports
Annex 3 – Reported Kerch Strait inspection area
Annex 4 – Incidents

Ukraine and northern Black Sea ports

Refer to the following page for definitions and information on sanctions/commercial restrictions

Port	Current port situation	Current local situation	Operations	Security
Odessa	Regular cargo operations understood suspended for commercial operations, but operations related to the unilateral UKR corridor are known.	Russian strikes do occur against targets in the Odessa Oblast, including some direct targeting of Odessa city and port facilities. Further targeting and increased focus as part of military operations cannot be ruled out.	🟥	🟥
Pivdenny	Regular cargo operations understood suspended for commercial operations, but operations related to the unilateral UKR corridor are known.	Located in the Odessa Oblast where Russian strikes have taken place, including in the nearby city of Yuzhny. Further targeting in the area and increased focus as part of military operations cannot be ruled out.	🟥	🟥
Mykolaiv	Closed. Cargo operations suspended for commercial operations.	In control of Ukrainian forces, but strikes and shelling, by Russian forces, of targets in or near the city, has been reported.	🟥	🟥
Mariupol	Disputed operational status.	Controlled by Russian forces and part of annexed territory. Actual operational status is disputed with Russian authorities reporting the port to be open, although this is with very limited traffic prioritized by the Russian state. Reports indicate rebuilding of the port facilities by Russian military and contractors.	🟥	🟥
Chornomorsk	Regular cargo operations understood suspended for commercial operations, but operations related to the unilateral UKR corridor are known.	Russian strikes have occurred against targets in the Odessa Oblast. Further targeting in the area and increased focus as part of military operations cannot be ruled out.	🟥	🟥
Ukraine Danube ports	Ukraine Danube orts are understood operating and handling ship calls via the Danube, and the Sulina and Bystre Canals.	Incidents involving mines have occurred in the Black Sea near the canals. Russian strikes do occur against the port of Reni and Izmail. Previous incidents indicate a Russian priority of targeting the logistics infrastructure on or near the Danube, including port infrastructure. Collateral damage to vessels is possible. Local weather conditions and pilot shortages also impact maritime operations. ISPS Level 3 is in place, as communicated by the Ukrainian authorities. Delays and congestion have been reported in relation to port and canal operations.	🟨	🟥

Port	Current port situation	Current local situation	Operations	Security
Kerch Strait	Open for navigation within but closed for unauthorised transit. Ports located within the Strait are reported to be operating. Inspection regime and additional security measures are in place.	UKR naval drone or missile strikes against the Kerch Strait Bridge and nearby naval installations do occur. Attacks are less likely to directly target commercial maritime traffic, although collateral damage cannot be ruled out, with Ukrainian authorities reiterating the threat towards vessels carrying military related equipment to Ukrainian Azov ports Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure, using naval drones or cruise missiles, is possible. Russia has announced transit restriction of vessels which are not loaded in Russian ports. Scrutiny against crew is possible *. See Annex 3 for reported Kerch Strait inspection area.	🟨	🟥
Russian Black Sea ports	Open with restrictions. Additional security measures are in place.	Ports operating at ISPS level 2, some operational delays possible. Collateral damage to vessels may occur in case of incidents. Scrutiny against crew is possible *. Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure, using naval drones or cruise missiles, is possible.	🟨	🟥
Russian Sea of Azov ports	Open with restrictions. Sea of Azov is currently closed to unauthorized navigation by the Russian authorities. Additional security measures are in place.	Ports operating at ISPS level 2, some operational delays possible. Collateral damage to vessels may occur in case of incidents. Scrutiny against crew is possible *. Ukrainian attacks against naval or state-affiliated vessels, and port infrastructure, using naval drones or cruise missiles, is possible.	🟨	🟥
Temporary corridor from UKR Black Sea ports	Operational status is reported to be open – though influenced by operational circumstances in the NW Black Sea.	Operational, but transits are believed to be on a case-by-case basis. Sources indicate limited UKR escorts in the form of RHIBs. Any tacit agreement from Russia on current transits are unknown, and further Russian acceptance is unclear if the increased tempo of Ukrainian strikes on Russian assets in the Black Sea continues. Military activity in and near the corridor is possible.	🟥	🟥
Constanta	Open.	Operating, with additional cargo diverted to Constanta due to closed Ukrainian ports. Congestion should be expected, and although this is being managed, it could lead to delays.	🟨	🟩

* Constraints and demands related to vessels with Ukrainian crewmembers. Russian crew with previous military service may be questioned by authorities withheld as part of Russian mobilization efforts. ** Risk Intelligence is not responsible for third party content.

Operations and Security definitions

Operations:

Green – Operations in the area are ongoing normally with no significant issues.

Yellow – Some delays or disruptions in the area may be expected, which could be due to limitations to, for example, port operations and/or congestion in the area, or other difficulties with access or operating at the required ISPS level or complying with other procedures either at port or offshore.

Red – Operations have been significantly disrupted and ports or areas might be closed or only partially operating due to restrictions, blockades, lack of functioning infrastructure, personnel disruptions, and access concerns, or other issues preventing all or most operations.

Security:

Green – The area is secure and there are no direct or indirect security threats in the port vicinity or offshore area. Low threat to vessels/personnel.

Yellow – There are no direct security threats but there are possible indirect threats in the vicinity, particularly but not limited to conflict taking place in proximity either on land or offshore. Moderate threat to vessels/personnel.

Red – Direct threats are possible to the port or area and/or its immediate approaches, including collateral damage in the immediate area or direct attacks that could target infrastructure and vessels at berth/anchorages/underway. High threat to vessels/personnel.

Note on sanctions and commercial restrictions

Sanctions and commercial restrictions are being imposed on Russia in response to its invasion. These sanctions are evolving and will affect ongoing business operations in many complex legal ways. Sanctions are being applied to individual Russians, business entities, and to certain Russian export products (such as oil products). There are also restrictions on specific nationalities (such as US citizens) engaging in certain activities, restrictions on payments (in certain currencies and through certain institutions), and restrictions on Russia's import of particular dual-use items and technologies. Port entry bans for Russian vessels are being implemented (in the UK, for example).

The fine print of sanctions and restrictions might affect chartering arrangements in unexpected ways, depending on the connection to Russia. These issues, as well as insurance issues for operating in war risk areas, are not covered in this report and might need to be assessed separately to reduce the risk of exposure.

Annex 1:

Reported mined areas

Risk Intelligence (Illustration for visual guidance only)

NAVAREA III: See above for visual guidance on mined areas according to the Spanish flag administration (NAVAREA III 0092).

Mined areas are most likely a combination of deeper sea mines and shallow water mines for anti-amphibious operations as well as on beaches. Mines in the sea are most likely cabled or anchored and under control.

Please also note that active NAVAREA III warnings include a warning of possible drifting mines (NAVAREA III 0122) for Northwest, West, and Southwest areas of the Black Sea.

Annex 2:
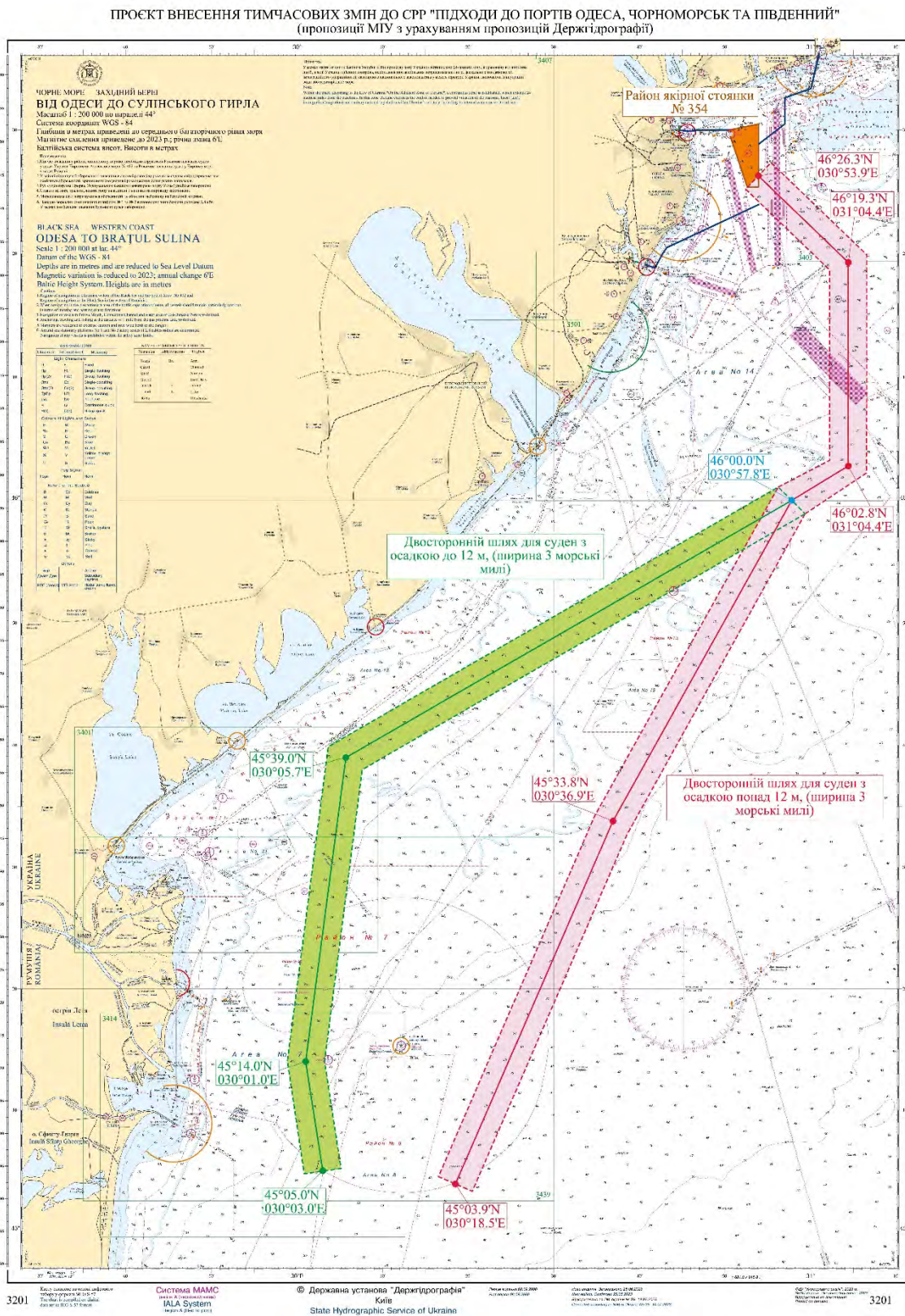
The above chart shows the announced temporary routes for civilian vessels to and from Ukrainian Black Sea ports. The Ukrainian Navy emphasizes that war risks, including mines, remain. Further details can be found in the IMO Circular Letter No.4748 *(Source: IMO Illustration for visual guidance only)*

Annex 3:

Reported Kerch Strait inspection area, as announced by the Russian authorities 02 August 2023.
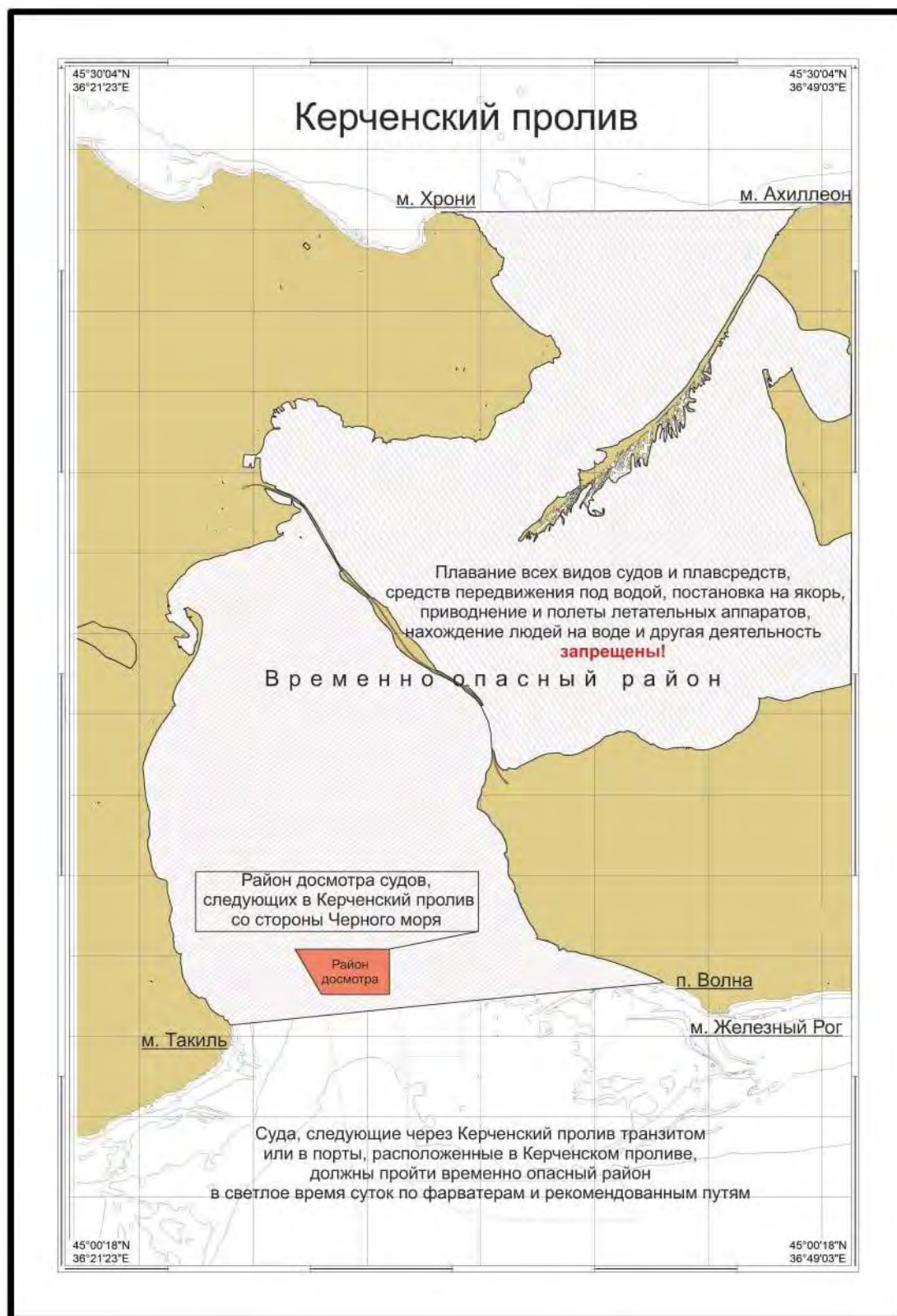
#1 Tuapse refinery hit by drone attack

25 January 2024
Counter insurgency/Military operation

Region: Europe
Area: Black Sea

A Rosneft refinery was reportedly hit by a drone attack in Tuapse, Russia during the early hours of 25 January 2024.

Multiple reports indicate that explosions were seen and fires broke out at the oil refinery and oil depot. Eyewitnesses reported seeing a drone attack. Reports indicate that the area of the fire is approximately 200 square meters. Firefighters are reportedly on the scene attempting to contain the blaze. It was also reported that no one was injured as a result of the attack.

IMO: N/A
Call Sign: N/A

Marker Position: 44° 5' 48" N 39° 5' 30" E

#2 Odesa hit by drone attack

24 January 2024
Counter insurgency/Military operation

Region: Europe
Area: Black Sea

Targets in the city of Odesa, Ukraine were reportedly hit during a Russian drone strike during the evening hours of 24 January 2024.

The Odesa Oblast Governor told the media that the attack left two people injured, caused damage to an industrial facility, infrastructure and residential buildings and started fires. Regarding the injuries, one man suffered from burns, and another was hospitalized with multiple cuts.

IMO: N/A
Call Sign: N/A

Marker Position: 46° 28' 41" N 30° 43' 45" E