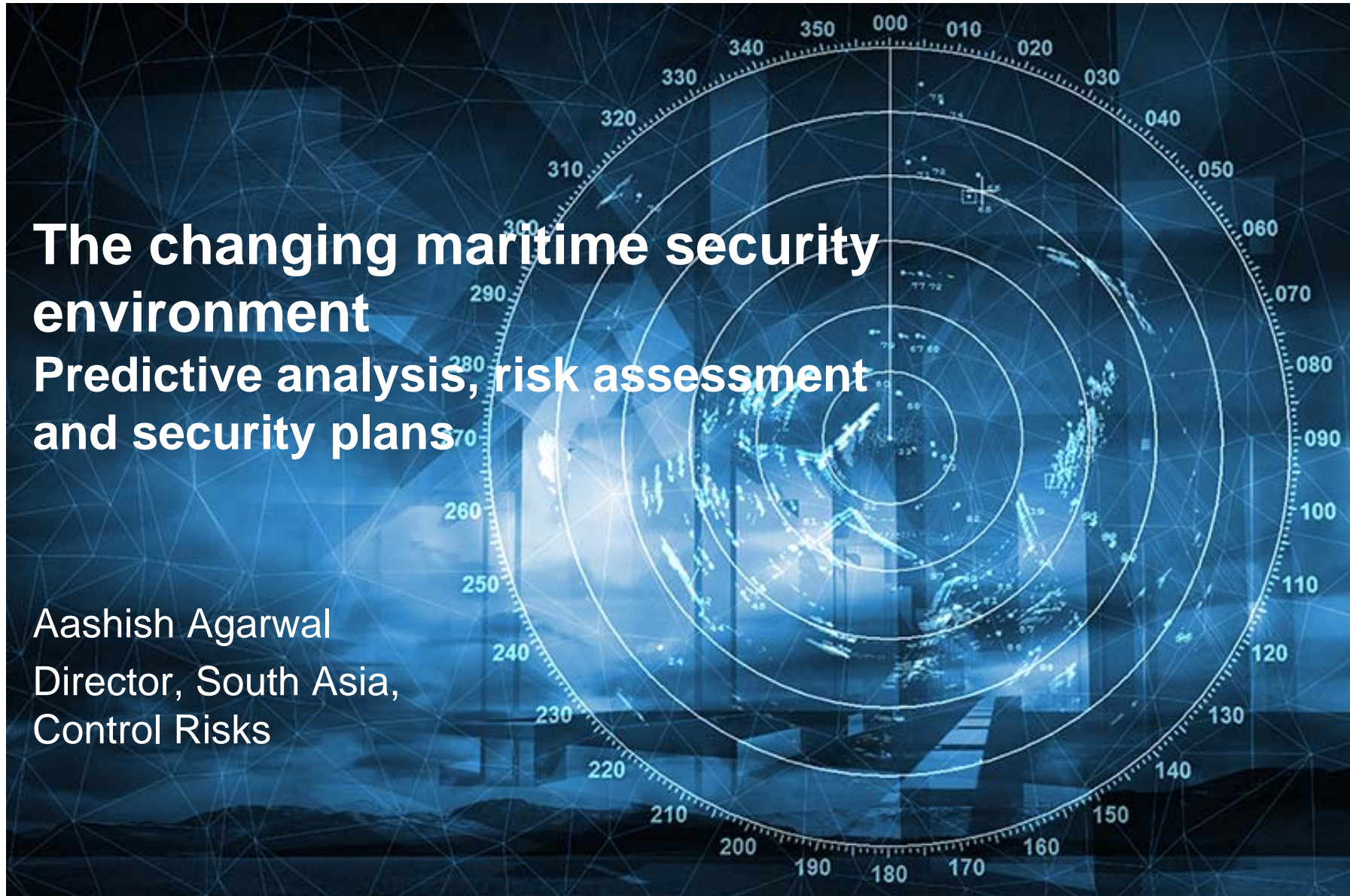


**The changing maritime security environment
Predictive analysis, risk assessment
and security plans**

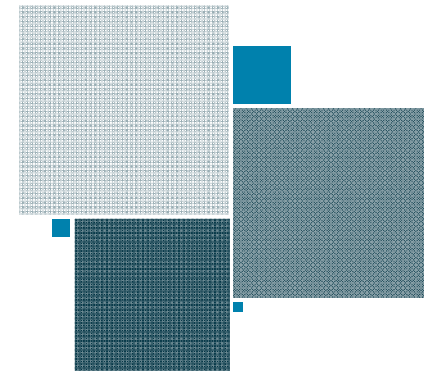
Aashish Agarwal
Director, South Asia,
Control Risks





Overview

- **Key risks**
- **Global maritime security issues**
- **Developments in maritime security provision**
- **Conclusions and questions**



Control Risks is a global, independent risk consultancy specialising in **political**, **integrity** and **security** risk

- Since 1975, we have worked in over 130 countries for more than 5,500 clients
- Trusted advisor to more than 75% of the Fortune 500
- 36 offices on 5 continents
- Ethical and independent

Abu Dhabi | Al Khobar | Amsterdam | Baghdad | Basra | Beijing | Berlin | Bogotá | Chicago | Copenhagen | Delhi | Dubai | Erbil | Hong Kong | Houston | Islamabad | Jakarta | Johannesburg | Lagos | London | Los Angeles | Mexico City | Moscow | Mumbai | Nairobi | New York | Panama City | Paris | Port Harcourt | São Paulo | Seoul | Shanghai | Singapore | Sydney | Tokyo | Washington DC



We enable our clients to succeed in complex, hostile environments



Maritime Risk Analysis

Transit & Off-Shore Security (East Africa)

- Over 500 Transits with 4,000 transit days.
- Large operation in Nigeria with 8 years experience

Response

- Control Risks has deployed on over 50 cases of maritime hijacking and kidnap: Horn of Africa (43%), Gulf of Guinea (57%).
- Fifteen full-time consultants with significant piracy case experience.

Maritime Risk Analysis

- Dedicated maritime analysis team
- Online Maritime Security product (Control Risks Maritime Security Online)

Port Security | Vessel Assessments and Audits | Training | Investigations

Control Risks

SPECIAL ADVISORY
ILLEGAL MIGRATION
 13 October 2014

Illegal migration and the maritime sector

The issue of illegal migration by sea is a global one. It is also one which impacts on the maritime industry as the shipping sector between continents often uses major shipping lanes.

This problem is similar to the issue of individuals stowing away on board merchant vessels with a view to arriving at an anchor. The advisory states specifically to the subject of merchant vessels encountering and providing assistance to irregularly migrating seafarers.

...of migrants from the assisting vessel, as ...

...with the commercial maritime domain.

Control Risks

FORECAST | SOUTH-EAST ASIA

Recent activity | 9 October - 23 October 2014

Control Risks recorded 13 incidents of piracy and armed robbery at sea in the region during the time period. Five of the incidents were reported in Indonesian anchorages, with an additional four being reported on vessels underway in the Singapore Strait. Incidents were also reported off Vietnam, Malaysia, and in the southern South China Sea.

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Targeting of vessels

Incident Type	Passenger	Support	Supply	General Cargo	Other	Total	Percentage
Oil tanker / Tanker	0	0	0	0	0	0	0%
General Cargo	0	0	0	0	0	0	0%
Security vessel	0	0	0	0	0	0	0%
Product tanker	0	0	0	0	0	0	0%
Crude tanker	0	0	0	0	0	0	0%
Other tanker	0	0	0	0	0	0	0%
Tanker	0	0	0	0	0	0	0%
Container	0	0	0	0	0	0	0%
Bulk carrier	0	0	0	0	0	0	0%
General cargo	0	0	0	0	0	0	0%
Fishing	0	0	0	0	0	0	0%
Passenger	0	0	0	0	0	0	0%
Other / unknown	0	0	0	0	0	0	0%
Total	0	0	0	0	0	0	0%

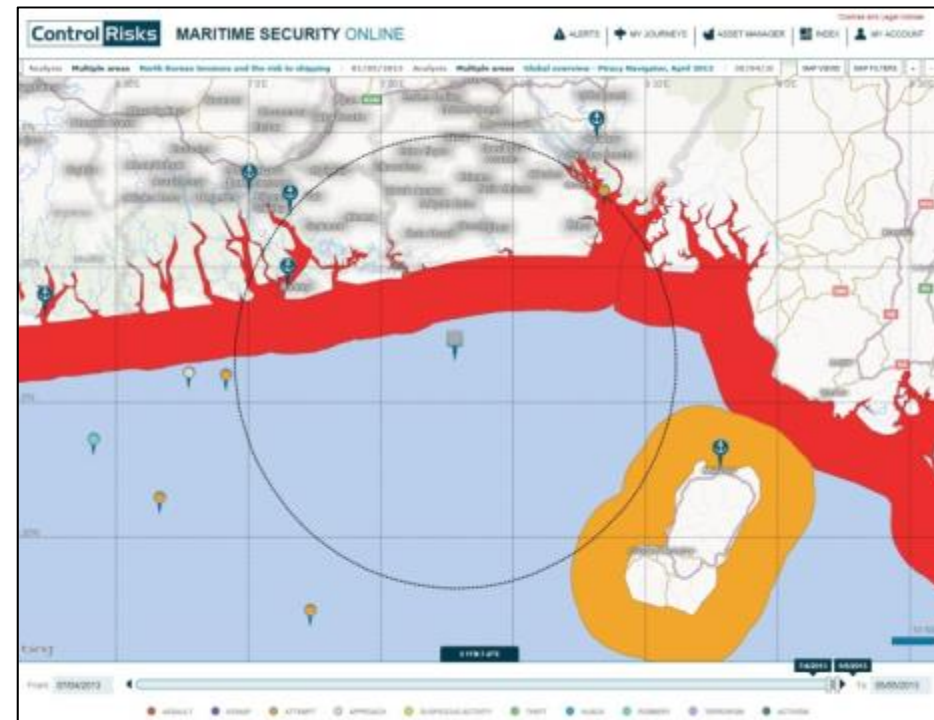
Vessel targeting: Reported incidents in September 2014 involved three passenger vessels, one support vessel, one tug, one bunkering tanker and a fishing vessel.

Proportional targeting by vessel type

Overview

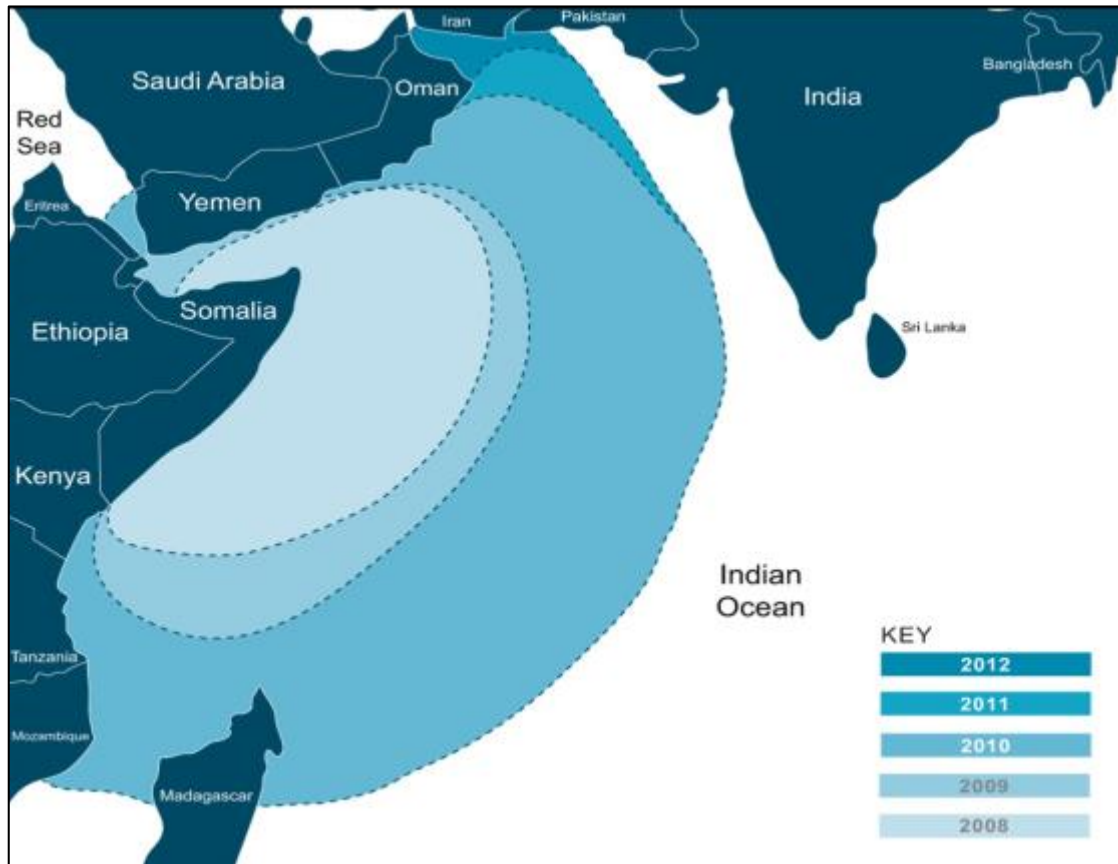
Key political, security and operational risks in the maritime environment.

- Piracy and armed robbery at sea
- Port security
- Maritime terrorism
- Interstate conflict
- Territorial disputes
- Maritime activism
- Port strikes and demonstrations



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Piracy in the Horn of Africa



**Vessel is attacked,
boarded and hijacked**

**Crew ordered to move
the vessel to Somalia**

**Vessel is moored along
the Somali coast**

**Ransom is negotiated for
vessel and crew release**

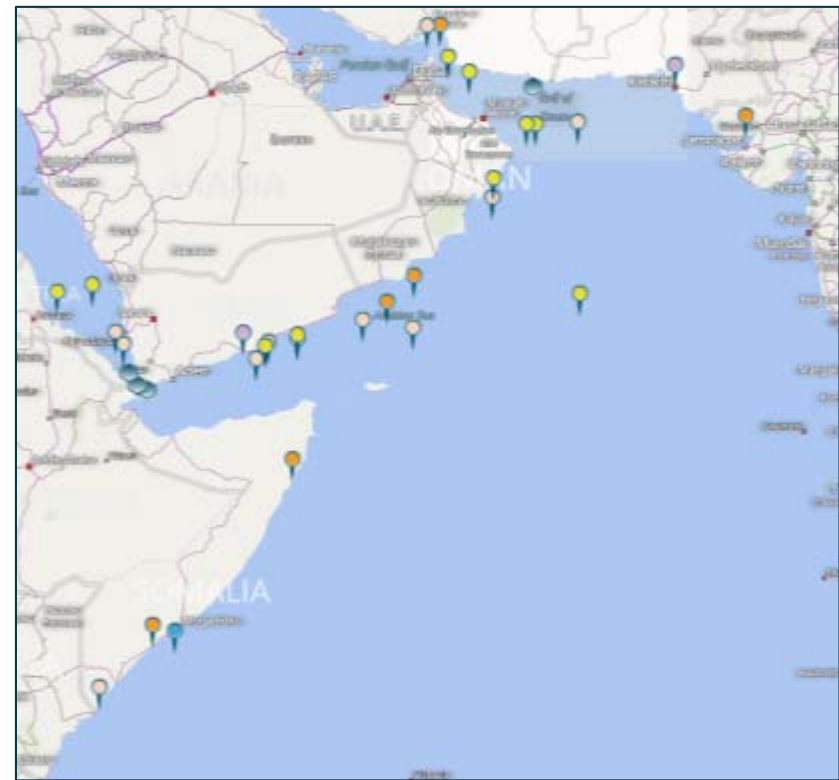
Control Risks

Piracy in the Horn of Africa

2012



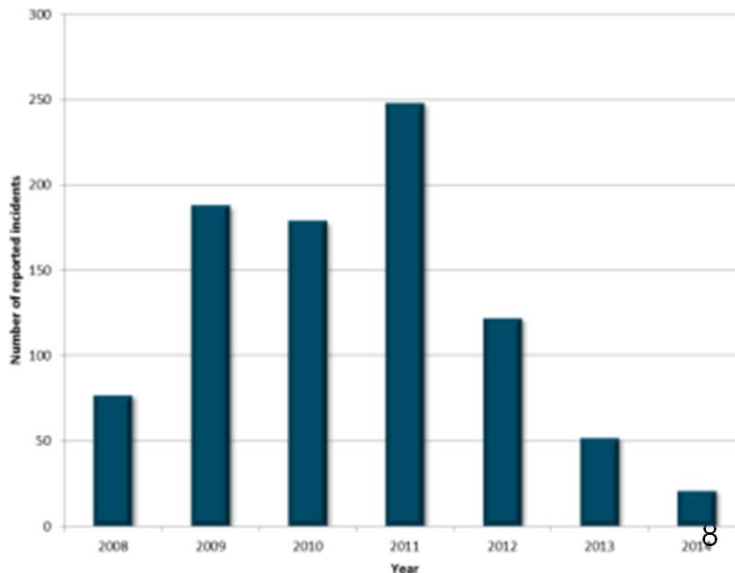
2014



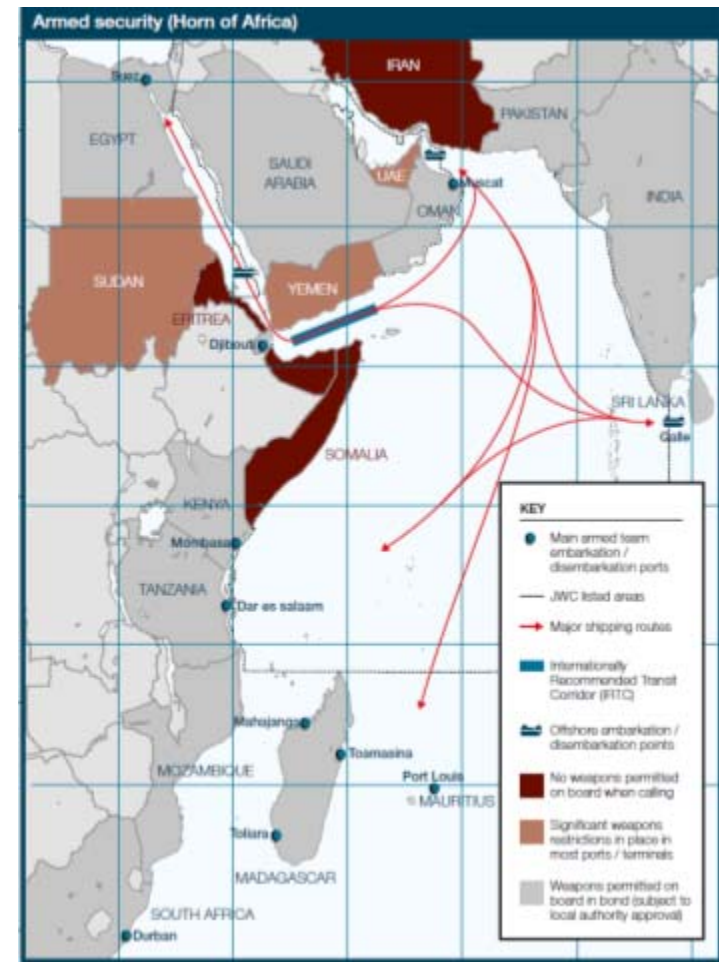
CLUSTER ASSAULT KIDNAP ATTEMPT APPROACH SUSPICIOUS ACTIVITY THEFT HIJACK ROBBERY TERRORISM ACTMSM

Somali piracy | The current situation

- **Key Reasons for the decline**
 - **Increased implementation of Best Management Practices (BMP)**
 - **Increasingly aggressive naval strategy**
 - **Increased use of armed guards**



Total reported incidents of piracy, 2008 - 2014



Control Risks

Somali piracy | The current situation

1 January – November 2014

- 3 Attacks
- 2 Hijacks (dhow)
- 19 Approaches
- 20 cases of suspicious activity



CLUSTER ASSAULT KIDNAP ATTEMPT APPROACH SUSPICIOUS ACTIVITY THEFT HIJACK ROBBERY TERRORISM ACTIVISM

The future of Somali piracy

- **Somali piracy currently at its lowest level since before 2008.**
- Groups retain the capability and intent to launch attacks on shipping especially on areas close to the coast.
- Although there have been some onshore initiatives, the situation onshore has not improved sufficiently to prevent groups from launching further attacks.
- There is increased concern about a reduction in international naval forces as merchant vessels are transiting closer to the Somali coast.
- Despite some high profile arrests, the threat of Somali pirates remains and incidents continue to be reported.



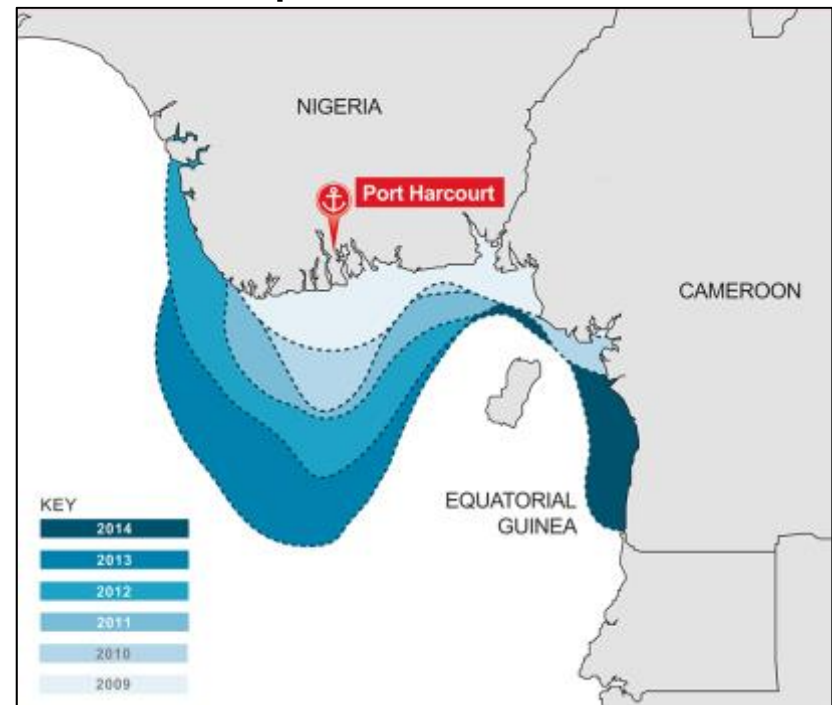
Piracy in West Africa

- More complex than the Horn of Africa, a variety of different incident types including:

Hijack of product tankers for cargo-theft



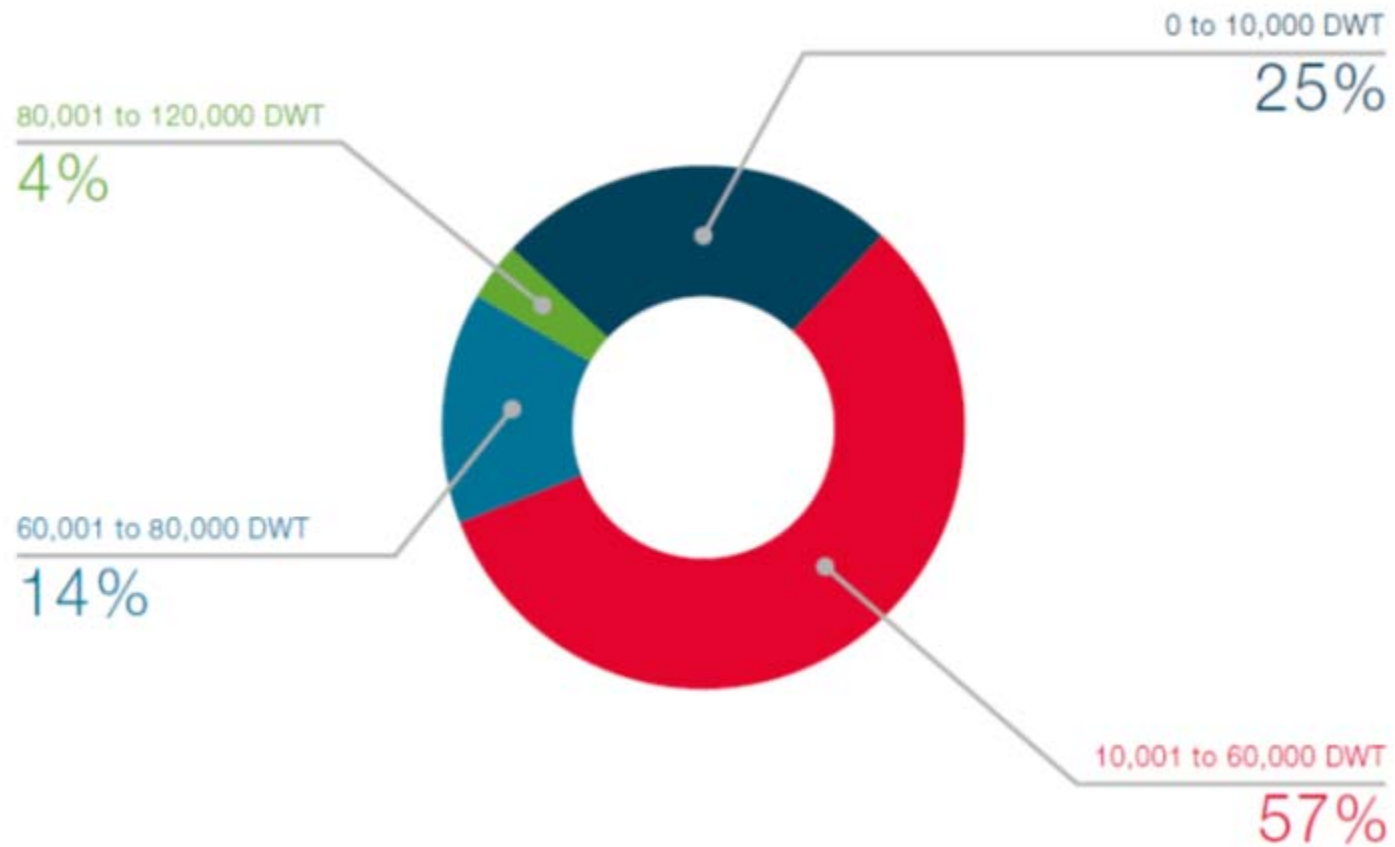
Kidnap of crew members for ransom



Control Risks

Hijacking for cargo: Breakdown by size

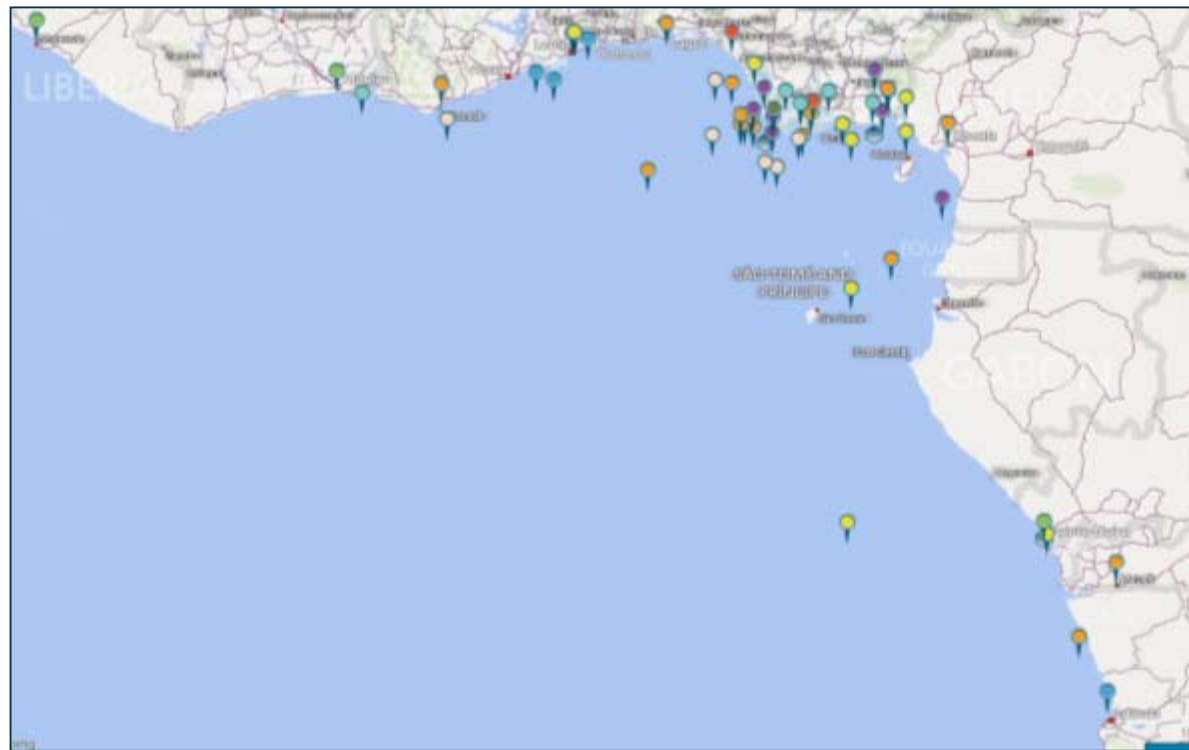
Hijacking-for-cargo: Breakdown of hijacked tankers by size, 2010-2014*



Control Risks

Piracy in West Africa

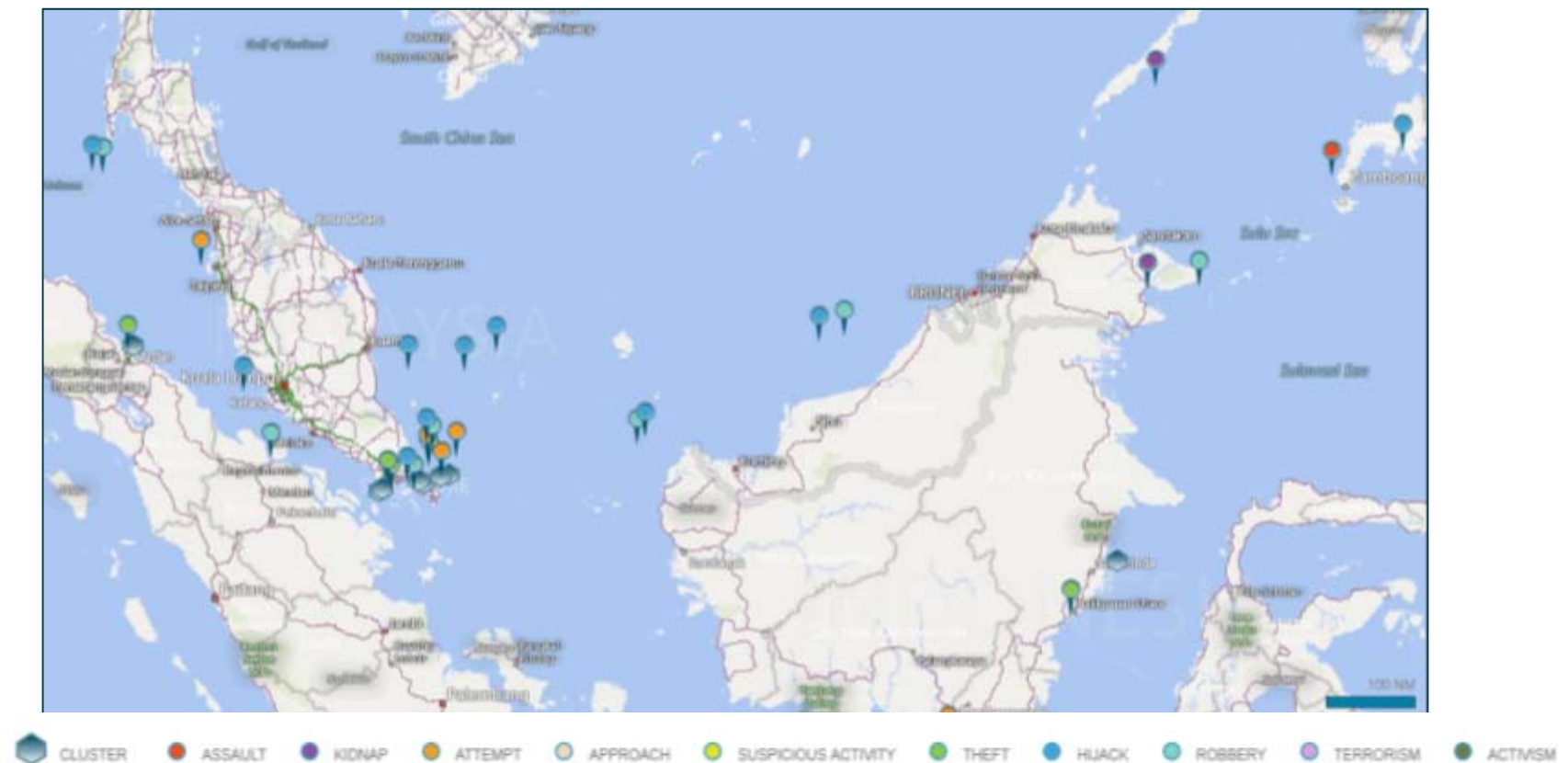
- Attacks are more violent, risk to crew members welfare is higher
- Security provision is more complex – the Horn of Africa armed security model is not permitted



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Maritime threats in South-East Asia

- Higher number of incidents but the majority remain low-level port and anchorage crime or armed robbery underway in the Singapore Strait
- Significant increase in small product tanker hijacking for cargo



■ Additional maritime security issues

- Increased concerns regarding maritime terrorism
 - East Africa
 - Middle-East
 - South-East Asia
- Impact of conflict and territorial disputes
 - South China Sea
 - Illegal migration
- Impact of onshore instability, conflict or domestic issues
 - Ebola virus outbreak
 - Instability in Ukraine

■ Developments in maritime security

- **Secure anchorages areas**
 - Ports in high risk areas are increasingly establishing specially patrolled areas to concentrate port security resources
 - Examples in the Horn of Africa, Gulf of Guinea and South-East Asia
- **Expansion of reporting centres and best management practices**
 - Gulf of Guinea has new reporting centre (Ghana) and region specific Best Management Practices (BMP)
- **Developing a location-specific maritime security solution**
 - Understanding the specific threat to a specific vessel type in a specific location
 - Working within the restrictions of local countries

Conclusions

- Piracy will continue to be a major issue in 2015 however the nature of the threat varies depending on the location.
- Additional security threats, both onshore and offshore, continue to threaten maritime operations.
- When developing security plans, shipping companies need to understand what the specific threat is to the vessel and what security measures are permitted and appropriate for that area.
- Ports are realising the economic benefit and competitive advantage of providing a secure port and anchorage area for vessels to use during port calls.



RiskMap Maritime 2014

