

MONTHLY SECURITY FORECAST

JULY 2024

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MONTHLY SECURITY FORECAST

July 2024



The *Monthly Security Forecast* gives managers insight into our assessment of significant events and any likely changes to the risk outlook in the coming month, globally.

It covers key indicators or drivers of deterioration being tracked by our regionally based security specialists and provides recommendations on how you can prepare, factoring in any planning constraints we have identified.

Our *Monthly Security Forecast*, like our Insight Reports, is part of our broader Premium Workforce Resilience offer. It complements our *Regional Security Forecasts*, available weekly to all subscribers.

Legend	
Indicator & definition	Action required
Low likelihood of substantive change in reporting period (30 days unless specified)	None
Some likelihood of change; no substantive deterioration	Requires vigilance
Significant likelihood of substantive change	Increased readiness to adapt risk management plans
Critical change imminent	Action required to update or implement plans
Unpredictable high-impact, low-likelihood event	Be prepared to respond at short notice to account for workforce and/or amend plans

If you have any questions about the recommendations or assessments in this forecast, please call your nearest Assistance Centre.

MOZAMBIQUE

- Southern African Development Community (SADC) troops will finalise their withdrawal from Cabo Delgado province in July.
- The Rwandan Defence Force has increased its troop deployment in Cabo Delgado to offset the security vacuum created by the withdrawal.
- The Islamist militant al-Sunnah group will still seek to exploit the withdrawal and increase attacks in the central and southern parts of the province.

Situation

The SADC Mission in Mozambique (SAMIM) announced in January that it will withdraw its force from Cabo Delgado when its mandate expires on **15 July**. At its peak, 2,200 SAMIM troops were deployed in eastern, southern and western Cabo Delgado, including in Macomia, Muidumbe and Nangade districts. Some troops have already been withdrawn ahead of the deadline. In April, troops from Botswana and Lesotho departed, followed by troops from Angola and Namibia in May. Troops from Congo (DRC), Malawi, Tanzania and Zambia remain in the provincial capital Pemba, having already been withdrawn from their operating bases elsewhere in the province.

Some of South Africa's 1,495 troops also remain in Cabo Delgado. However, unlike the other SAMIM troops, South Africa announced on 23 April that it would retain a presence in the province until **31 December**. Although related details are limited, it appears that these troops will be focusing on facilitating the withdrawal of equipment and other assets rather than engaging in combat. Thereafter, South Africa

will keep 200 troops in the province until **March 2025** to fight illegal maritime activity. Reports also indicate that Tanzania plans to keep around 300 troops in Cabo Delgado as part of a bilateral agreement with Mozambique to secure the shared border area.

In response to SAMIM's withdrawal, Rwanda has deployed additional troops to Cabo Delgado as part of a bilateral agreement with Mozambique. Rwanda intends to train Mozambican soldiers and deploy its troops to the areas previously occupied by SAMIM. Rwanda initially deployed 1,000 troops to Palma and Mocimboa da Praia districts in July 2021. By 2022, the country had expanded this deployment to include Ancuabe district and a total of 2,500 troops. In May 2024, local reports indicated that up to 1,500 additional Rwandan troops had been deployed to Cabo Delgado after the military earlier announced that it would send a total of 2,000 extra soldiers.

Since its July 2021 deployment, SAMIM, in collaboration with Mozambican and Rwandan troops, has helped to stabilise Cabo Delgado. This includes displacing al-Sunnah from its bases and reducing the militants' numbers from a reported estimate of 2,500 to 200. This has allowed more than 500,000 internally displaced people (IDPs) to return home and some public services in these areas to resume. However, SAMIM has not yet achieved its objective of eradicating al-Sunnah. Funding constraints have plagued the mission, eventually contributing to its withdrawal. Troop and equipment shortages have also created difficulty in securing Cabo Delgado's expansive and rugged terrain. Additionally, SAMIM, Mozambican and Rwandan troops have struggled to co-ordinate their activities, undermining operations.

In recent months, al-Sunnah has regained momentum in central coastal districts, with the number of attacks nearly tripling in the first quarter of 2024. The transnational extremist Islamic State group has also increasingly claimed responsibility for al-Sunnah attacks, signalling increased communication and potential co-ordination between the groups. In addition to taking advantage of the reduced troop presence, the withdrawal likely represents a symbolic victory for the militants, boosting their morale. In May, al-Sunnah launched its largest attack since the deployment of foreign troops to Cabo Delgado. The attack occurred in Macomia town on 10-12 May, days after the SAMIM troops had left the town. More than 100 militants were involved in the attack. There were between ten and 23 casualties and an unconfirmed number of vehicles and medicines were stolen by al-Sunnah.

Implications

SAMIM's withdrawal will present a temporary setback to military operations against al-Sunnah and the security environment will deteriorate **over the coming weeks and months**. It is unclear if Rwanda will deploy all 2,000 troops, as previously stated. This may be contingent on the European Union providing the 40m euros requested by Rwanda to support the mission. Without the full deployment, the overall foreign troop numbers will decline by up to 700 soldiers following SAMIM's withdrawal. Given that troops were already struggling to secure vast parts of Cabo Delgado, a reduction in their numbers will present a significant challenge to operations. Mozambican troops lack the training and equipment to adequately fill this gap. Additionally, though Rwanda has stated that it is exploring the means to increase the mobility of its forces to patrol wider areas, it will have to contend with Cabo Delgado's difficult terrain and limited logistics networks.

Al-Sunnah will seek to exploit any security vacuums created by SAMIM's departure. Following the attack on Macomia in May, small groups of militants have been spotted in Macomia, Metuge, Mocimbia da Praia, Nangade and Quissanga districts. We expect al-Sunnah to prioritise attacks in these districts over the coming weeks. If the group is able to establish a fixed presence in these areas, it could use this to launch attacks in surrounding districts, including in remote areas and along roads in Ancuabe, Pemba and Palma districts. Attacking Pemba city and strategically important Liquefied Natural Gas (LNG) sites will nonetheless remain difficult for al-Sunnah given the increased military presence in these areas, including foreign troops. Conversely, al-Sunnah has shown growing confidence in combating the Mozambican troops in outpost locations and will continue to target their positions.

Despite these challenges, the security environment is likely to slowly improve once the transition to the Rwandan forces has been completed. The Rwandan forces have proven to be effective at stabilising areas where they are deployed, largely due to their capabilities and the support they enjoy from the Mozambican government. This support has aided in intelligence sharing and co-ordinating operations. The Rwandan forces' effectiveness has translated into reports of al-Sunnah being less willing to combat them directly. Additionally, the Rwandan troops have been able to forge relations with local nationals, which has aided in information gathering. This has reportedly been done through leveraging their knowledge of Swahili, which is also spoken in Cabo Delgado, and through other community engagement initiatives. Nonetheless, without a holistic approach to addressing the drivers of the insurgency, expect insecurity to persist in Cabo Delgado and continue to spill over into neighbouring provinces in the coming months.

Separately, the ongoing violence in the province could disrupt preparations for and the conduct of the 9 October general election and potentially contribute to related unrest. Voter registration in Quissanga was disrupted in May due to al-Sunnah attacks. Political gatherings, including campaign meetings, and polling sites in Cabo Delgado could be potential targets for al-Sunnah.

Recommendations

International SOS continues to advise against travel to EXTREME-risk districts of Cabo Delgado (Macomia, Meluco, Mocimboa da Praia, Muidumbe, Nangade, Palma and Quissanga) due to the persistently elevated risks from militancy combined with limited logistical networks. Workforce in surrounding districts should also exercise heightened alertness and be prepared to increase security measures at short notice due to the growing fluidity of al-Sunnah's activities.

Essential travel to LNG sites should be conducted in close co-ordination with the onsite security team and specific recommendations given by onsite contacts should be followed. Travel to the southern districts of Cabo Delgado, including Pemba, requires enhanced precautions, a specific pre-travel threat assessment, strict journey management protocols and support from a local security provider. Expect a heightened security force presence in this region and follow all instructions.

Organisations with essential workforce in EXTREME-risk districts should define organisation-specific triggers marking a deterioration in the security environment and be able to rapidly extract workforce if these triggers are met, given the limited abilities of the authorities and security providers. Managers should ensure evacuation plans are rapidly implementable for both foreign and local workforce. Plans should address arrangements for local nationals with different profiles, including those eligible for relocation (i.e. domestic travellers).

Ensure robust stand-fast arrangements are in place if relocation from the area is not possible. Adequate supplies (drinking water, food stocks, medical supplies and fuel reserves), communication equipment and accommodation should be available for at least one week in the event of standing fast. In rural areas, confirm the ability and comfort level of workforce to stay for an extended period at their destination with limited or no support.

Essential workforce in these areas should closely monitor developments in liaison with reliable local contacts, stay informed of their organisation's incident management protocols and understand their role in response procedures. They should also maintain a list of emergency contacts, both electronically and on paper, and keep copies on

How we can help

- **Presence in-country:** International SOS has a permanent presence in Pemba, including a clinic, and an accredited network of security providers.
- **Services offered:** The capability to assist in Cabo Delgado will depend on the nature and location of the request.
- **Activation time:** Depends on the location and availability of resources at the time of the request/resources at the time of request.
- **Secure accommodation:** Yes.

their person at all times. They should also have an alternative means of communication in the event of a telecommunications outage and have ready access to cash.

Main indicators of deterioration	Assessment
Attacks targeting LNG sites or areas close to LNG sites	Given their higher levels of overall security, LNG sites have so far been insulated. Al-Sunnah has also not shown much interest in targeting LNG sites but has stated that it is motivated to protect resources in Cabo Delgado, making them a potential target. An attack would indicate that the group is emboldened, increasing its risk profile.
Increased militant activity between Mocimboa da Praia and Pemba, including attacks on main roads, communications or other infrastructure serving Pemba	This could signify an increased intent to target Pemba. Although an attempted attack on Pemba would most likely be small scale, a large-scale attack would mark a significant deterioration in the security environment.
Increased maritime activities by al-Sunnah	Without an adequate maritime security response, this would signal an increased potential for al-Sunnah to attack Pemba and LNG sites.

RWANDA

- Presidential and legislative elections will take place on **15 July**. We expect President Paul Kagame and his Rwandan Patriotic Front (RPF) party to win both polls.
- Pre-election rallies or spontaneous outbreaks of unrest after the polls are unlikely due to a highly controlled security environment.
- Despite the LOW-risk nature of the security environment and the predicted outcome of the elections, managers should plan for escalation scenarios.

Situation

Citizens will vote in a single round for the president and the Chamber of Deputies (lower house of parliament). In the first role, and vying for re-election, is Kagame, who has been in power since 1994. A controversial referendum in 2015 amended the constitution, enabling Kagame to run for a further two terms after 2024. He could thus remain president until 2034. The RPF has a parliamentary majority and is supported by several other parties. Campaigning began on 22 June and will continue until **12 July**.

On 14 June, the National Electoral Commission published an approved list of candidates for the presidential race. Alongside Kagame is Frank Habineza of the Democratic Green Party of Rwanda and Philippe Mpayimana, an independent candidate. Six other candidates were rejected. Habineza and Mpayimana ran in 2017, with both securing less than 1% of the total vote. Kagame officially received 99% of the vote.

Outspoken critics of the government have been banned from running. For instance, former independent candidate Diane Rwigara and opposition leader Victoire Ingabire will not be able to contest the elections. Critics point to these as examples of a stringently controlled and corrupt political environment, underpinned by widespread human rights violations. Reports claim that several opposition figures have disappeared or been killed in recent years.

Implications

As in previous elections, it is highly probable that Kagame will retain the presidency and that the RPF, and supporting parties, will secure a majority and form a government. Given the lack of approved, organised and credible opposition, an alternative outcome is improbable. Notwithstanding any extraordinary events, therefore, the political and security environment will remain stable before, during and after the elections.

The most likely impact on the ground during the election period will be that of heightened security. Although the country is generally marked by a pervasive security force presence, this will be ramped up during the election period and especially on polling day. Spot-checks may also increase in frequency while road closures are likely to be implemented, with traffic restrictions resulting in increased travel times. We do not expect protests before or after the election, due to a highly restrictive environment. Demonstrations require prior approval from the authorities, but this is rarely requested or granted.

Several recent military coups across the continent have ousted long-term leaders. As such, concerns have been raised regarding the level of unity at the country's top political and military levels. In August 2023, following the military coup that removed long-standing Gabonese president Ali Bongo Ondimba from power, the Rwandan military announced that Kagame had retired 83 senior officers. Prior to this, Kagame in June 2023 carried out a major reshuffle of the domestic security services and replaced the defence minister. More recently, Kagame on 12 June replaced members of his cabinet, including the interior and foreign ministers.

How we can help

- **Presence in-country:** An accredited network.
- **Services offered:** From ground transport services to assisting with evacuations.
- **Activation time:** Up to 24-48 hours to activate, depending on location and availability of resources at the time of the request.
- **Secure accommodation:** Yes.

During the 2013 election cycle, grenades exploded in a central market in the capital Kigali prior to the polls. The authorities blamed the attack on the Democratic Forces for the Liberation of Rwanda (FDLR), an ethnic-Hutu rebel group whose members include militiamen who led the 1994 Rwandan genocide. It is now based in neighbouring eastern Congo (DRC). However, the FDLR's capabilities have significantly declined over the years. This, in tandem with a strong troop presence along the Congolese border, makes similar attacks on Rwandan soil unlikely during the present election cycle.

Recommendations

In-country workforce should anticipate heightened security and ensure they always carry identification. They should plan journeys accounting for increased travel times resulting from possible road closures and restrictions.

Managers should ensure that workforce have access to timely and credible sources of information in the event of an unexpected deterioration in the security environment. Emergency plans should be up to date and tested, including the ability to account for workforce in the event of a crisis.

Main indicators of deterioration	Assessment
An organised, anti-government protest movement emerges following election results	This is highly unlikely, given the tightly controlled security environment. If such a movement did emerge it would likely be forcibly suppressed.
The FDLR conducts attacks in urban centres	Although the probability of such attacks is low, a one-off incident cannot be ruled out. A successful attack could potentially result in dozens of casualties.
An attempted or successful military coup	The likelihood of such a scenario is low. However, if a coup occurred it could result in land and air border closures, significantly heightened security and outbreaks of violence.

AFRICA: ON WATCH

Burkina Faso: Continue to monitor for signs of military unrest and be prepared to stand fast or suspend inbound travel if military infighting occurs. Tentative signs of possible insurrection emerged in mid-June following reports of a military rout in the east at the hands of Islamist militants.

Lesotho: Gang violence will continue to pose credible incidental risks to people in the vicinity of attacks. More than 600 people have been killed so far in 2024 in attacks linked to the so-called Famo gangs. Public figures will likely continue calls for the government to implement a state of emergency or initiate peace talks with the gangs.

South Africa: The security environment will begin to stabilise following the 29 May general election. However, there are underlying risks of sporadic protests linked to calls from the opposition uMkhonto weSizwe for the election results to be annulled, and due to opposition to the national governing coalition. Protests will carry the risk of localised unrest.



CANADA, US

- An elevated risk of wildfires will exist throughout July in parts of Canada and the US.
- High temperatures and a lack of rainfall will create a conducive environment for fires.
- Some fires may prompt business and travel disruption, and the smoke from the fires can pose a health risk.

Situation

The wildfire season will pose an elevated risk due to heightened fire activity in Canada and the US in July. Lack of rainfall and higher-than-average temperatures will be key factors in allowing wildfires to ignite, grow and sustain themselves. These wildfires are likely to impact business and travel.

In the US, the National Interagency Fire Center (NIFC) has classified areas in Colorado, Hawaii, Idaho, Kansas, Nevada, New Mexico, Oregon, Washington and Utah states as having an above normal risk (highest on a three-tier scale) for significant

wildland fire potential. These areas are forecast to have above-average temperatures and dryer-than-normal conditions, increasing fire risks.

According to Natural Resources Canada (NRCAN), Alberta, British Columbia, Manitoba, Ontario, Quebec and Saskatchewan provinces as well as Nunavut, Northwest Territories and Yukon are areas most at risk of fires throughout July. The authorities say the risk of wildfires is highest in eastern parts of the country, from British Columbia to Northwest Territories. Very high temperatures and drought conditions across Canada will exacerbate these risks.

Numerous wildfires have already affected Canada and the US. In June, in Los Angeles county (California state, US), the so-called Post fire prompted temporary closures of the Interstate 5 highway and forced thousands of locals to evacuate. In May, the Parker Lake fire near Fort Nelson (British Columbia, Canada) prompted road closures and thousands of evacuations before fire-fighting units brought it under control. Further out-of-control fires are likely to similarly impact communities in their path.

Beyond the direct impact of the fires, burnt areas are vulnerable to landslides and floods months after a wildfire due to the loss of vegetation and weakening of the soil. Flooding may turn into mudflows carrying leftover ash and debris from fires. Additionally, populations near wildfire-affected areas are also at risk due to exposure to smoke.

Implications

The NIFC has set in the US a national preparedness level two (second lowest in a five-tier scale). This indicates that resource capability remains stable enough to sustain operations nationwide. Although there have been fewer fires in January-June of 2024 compared with the same period in 2023, burnt acreage remains higher than the average from 2014 to 2023.

In Canada, the national preparedness level is two (second lowest on a five-tier scale), indicating wildfire activity is increasing. However, British Columbia, Yukon and Newfoundland and Labrador are at level three agency

preparedness level. According to NRCAN, the number of fires countrywide and burnt acreage thus far in 2024 remain below average.

Canada experienced one of its worst fire seasons in 2023, and conditions in July could resemble those of 2023. Government officials expect much higher levels of fire activity in July compared with that of May and June.

Expect major disruption in areas affected by wildfires. Road closures are likely for extended periods, disrupting overland travel, and voluntarily or mandatory evacuation notices may be issued. The authorities are likely to issue bans against open fires. Although Canada and the US have robust disaster-response capabilities, wildfires can rapidly grow beyond the firefighters' ability to effectively control them.

Wildfires can directly impact health by causing injuries, and even death, from burns or inhalation of smoke. The latter is a mixture of hazardous air pollutants, including particulate matter, which can affect nearby and distant populations. Exposure to wildfire smoke can irritate the lungs, cause inflammation, affect the immune system and increase susceptibility to respiratory infections. Pregnant people, those with chronic obstructive pulmonary disease, chronic lung diseases, such as asthma, or cardiovascular diseases are more vulnerable to wildfire smoke. Long-term health impacts include worsening of lung and cardiovascular disease. Mental health conditions, including post-traumatic stress disorder, depression and anxiety, in adults and children can also increase. Access to healthcare may be impacted during and following wildfires. Hospitals, clinics and other health-care services can also be affected, resulting in limited operation. Access can also be impeded by conditions in the area and an increased demand for services.

Recommendations

Managers with interests in areas commonly affected by wildfires should continue to monitor official sources. Ensure that you have the most up-to-date information on any ongoing fires and the latest forecast information for weather that could affect wildfires or areas that have recently burnt.

There should be a robust relationship between workforce and local fire officials to quickly report fires near work locations. Work sites or offices should

Main indicators of deterioration	Assessment
Officials forecast Extreme or Very High risk of fire	Monitor official sources for updates on weather and fire conditions. Develop plans to respond to possible fires.
A medium-scale wildfire is reported near an urban centre or work site	Expect road closures and evacuations for locations near the fire.
A wildfire is reported near a major highway	Expect disruption and plan alternative routes in case of road closures. Inform workforce of the fire risk if they are travelling on the route. Ensure fire plans account for road closures.
The government issues health advisories for air quality	Monitor official sources for updates on weather and air quality health indexes for affected areas. Take into account vulnerable workforce who could be affected by poor air quality.
A large-scale wildfire is reported near a major urban centre or work site	Voluntary and mandatory evacuations over a wide geographic area are likely. Conditions for areas near the blaze may change rapidly due to unpredictable and out-of-control spread of fires. The authorities may suspend essential services, such as electricity.

How we can help

- **Presence in-country:** A vetted network of security and transport providers.
- **Services offered:** A robust offering of security services, including physical security support, secure transportation and consulting, as well as 24/7 access to advice and analysis from our local experts.
- **Activation time:** Up to 24-48 hours to activate, depending on location and availability of resources at the time of the request.
- **Secure accommodation:** Yes.

be hardened against the risk of wildfires. Those investing in new facilities should consider using fire-resistant material during construction. Vegetation near work sites should be cleaned frequently to reduce the risk of it catching fire. Workforce should patrol structures and property. Extinguish any small fires if it is safe to do so. Ensure that facilities have multiple sources of water for fire suppression and that emergency vehicles can easily access the worksite. Facility air handling should be reviewed, engaging Heating Ventilation and Air Conditioning specialists for recommendations on equipment and maintenance to optimise indoor air quality.

As wildfires can develop rapidly, ensure policies are in place so that situation updates on the fire, including how operations will change and recommendations to

local workforce, are quickly disseminated. These plans should be up to date, well-rehearsed and fully understood by all stakeholders. Business-continuity plans should cover a wide range of contingencies including what to do if transport to critical work sites is disrupted, how operations should be handled if sites cannot be used due to mandatory or voluntary evacuations and how to respond to business and workforce needs following a fire.

All travel itineraries should be flexible to account for fires and the possibility of evacuation orders. Transport disruption is likely, and severe fires can also affect operations at local airports. Trip planners should closely monitor the status of fires, as well as ash clouds, that can be a health hazard to vulnerable populations.

Workforce in areas susceptible to fires should prepare a 'grab bag' containing essential supplies, including water, high-energy food, essential medication, critical documents, spare batteries, a radio, fully charged communication devices, a first-aid kit, torches (flashlights) and respirator. They should also have personal evacuation and communication plans in place in case the authorities issue evacuation orders. These plans should have firm triggers for when to evacuate.

As operational concerns will continue even after the fire is extinguished, plans must be in place to account for the increased risks of flooding and landslides. Additionally, there must be resources in place for workforce who may have lost property in fires.

Organisations and their workforce should follow all official advice and directives. Monitor air-quality readings and forecasts, reduce outdoor activities accordingly and provide workforce with educational material to minimise health impacts. People in affected areas should minimise time outdoors, reduce physical exertion, keep windows and doors closed, consider using an air cleaning device and use air-conditioning units on the recirculate setting. When outdoors, consider using a respirator. Consult your doctor for an individual recommendation. If eyes are irritated, use saline eye drops regularly to minimize irritation. Contact-lens wearers should temporarily stop wearing them. Seek medical attention if any health concerns or symptoms develop.

HONDURAS

- President Xiomara Castro's announced crackdown on gangs faces numerous challenges and is unlikely to yield significant improvements in July.
- The approach is modelled on the Salvadoran case, but the different political context in Honduras will hinder the tackling of gang-related violence.
- While unlikely to be effective due to a lack of planning and resources, security operations may increase across July. Armed clashes may pose incidental risks to bystanders.

Situation

On 14 June, Castro announced a series of stringent measures intended to curb endemic violent crime across the country. These measures include preventive detention and collective trials for gang members, who are to be designated as 'terrorists'. Congress will have to approve a series of reforms to the penal code to this effect. Castro's plan also entails the construction of a 'mega-prison' to hold 20,000 inmates in the eastern departments of Olancha and Gracias a Dios. The new detention facility would greatly expand the prison system's capacity.

Honduras's Security Council has been ordered to crack down on gangs' leadership structures across the country. With this objective, the government is reportedly reinforcing security

operations in gang-dominated areas of the capital Tegucigalpa and other major urban centres, including San Pedro Sula (Cortes department). Moreover, the military and police will also revamp anti-drugs operations targeting illegal coca leaf and marijuana crops as well as synthetic drug laboratories in rural areas.

Castro's plan to revamp security in Honduras echoes the one implemented by El Salvador's president Nayib Bukele starting from March 2022. Across 2022 and 2023, Castro implemented state of emergency (SoE) policies nationwide to curb gang-related violence. However, the measures yielded limited results in terms of crime and violence reduction. According to the Armed Conflict Location & Event Data Project (ACLED), armed clashes between the security forces and armed groups grew at least 45% across 2023 compared with the previous year with the SoE in place. Riots in prisons, which have long been strongholds of gang activity, also reportedly increased. Castro's SoE has also been challenged by the political opposition as both a political advertising move and a means of concentrating power. Civil society also criticised the measures for their purported impact on political liberties, human rights and due process.

Implications

Castro appears to be emulating Bukele's crackdown, but without the necessary resources and planning. While ambitious, Castro's plan faces numerous challenges and may not have an immediately positive impact on the security environment.

Although the short-to-medium term outlook for the strategy is unclear, a short-term surge in violence is likely due to the potential for reprisals from criminal groups. Security operations targeting gang leaders in peripheral urban areas are bound to increase over the coming weeks. These operations are liable to trigger armed clashes, posing

incidental risks to bystanders. A heightened security force presence, including increased patrolling and police or military checkpoints are also likely.

Success on the scale of the case of El Salvador under Bukele is unlikely due to a lack of alignment between the branches of government. Honduras' population and territory are also considerably larger than El Salvador's. Although Castro's party, Libre, holds more seats in Congress compared with the start of her mandate, she may not garner the parliamentary support required to fast-track reforms to the criminal code in July. The reforms may also meet resistance from incumbent magistrates in the Supreme Court. Castro's previous attempts to impose SoE policies were met with resistance from

some sectors of civil society, who are also likely to question the newly proposed measures. Associated protests are possible in Tegucigalpa, San Pedro Sula and other urban centres in July. Although these are likely to be overwhelmingly peaceful, they can cause localised disruption to traffic.

Recommendations

Managers supporting workforce in Honduras should anticipate more large-scale security operations in urban centres, especially in Tegucigalpa and San Pedro Sula. They should liaise with local contacts to remain apprised of developments, including short-notice deployments of the security forces that may impact operations in-country.

Workforce should comply with official directives and protocols under the SoE. They should review the routes they take for daily activities and plan journeys avoiding areas impacted by ongoing security operations to reduce the risk of exposure to associated clashes. If undertaking essential journeys through such areas, verify the status of routes with local contacts and other resources prior to setting out. Do not attempt to drive through an ongoing security operation. Instead, turn around and find an alternative route to your destination. Should the security forces start to gather, vacate the area and find a secure location where you can wait for the situation to stabilise.

How we can help

- **Presence in-country:** : An accredited network of security and transportation providers in Honduras.
- **Services offered:** Ground transport, meet-and-greet, security site assessments, personal security awareness trainings, evacuations and other assistance.
- **Activation time:** Up to 24 hours to activate, depending on the location and the availability of resources at the time of the request.
- **Secure accommodation:** Yes.

Main indicators of deterioration	Assessment
Protests by political opposition increase	The political opposition may call for protests denouncing Castro's security policy and its purported impact on human rights and civil liberties. Although these demonstrations are expected to be largely peaceful, localised disturbances are possible. If the protests become unruly, the security forces are liable to use heavy-handed measures to disperse them.
A sustained increase in armed clashes	Security operations are likely to trigger a violent reaction from criminal groups. Gangs may erect roadblocks or attack civilian targets to spread the security forces more thinly. While most such violence is likely to be contained to gang-controlled neighbourhoods of urban centres, it can spill over to more upscale areas. Associated armed clashes can pose incidental risks to bystanders and disruption to travel.
The declaration of curfews in urban centres and more-stringent restrictions to mobility	In the event of increased violence in response to the crackdown, the Honduras government is likely to double down on hard-line measures. This may involve strict curfews and severe restrictions to mobility within urban centres and across the country. Penalties for non-compliance could be severe. Arbitrary detentions could pose an increased threat to workforce stationed in the country.

VENEZUELA

- A presidential election will be held on **28 July**. Opposition candidate Edmundo Gonzalez is leading in opinion polls, ahead of incumbent President Nicolas Maduro.
- Despite the opposition's significant lead, Maduro is expected to wield the country's electoral, judiciary and security apparatus in to remain in power.
- Disruptive demonstrations and localised political violence, which could escalate into wider civil unrest, are liable to affect the security environment.

Situation

Venezuela's presidential election will be held on 28 July. Years of negotiations with the international community have taken place to encourage Maduro to hold fair elections and thus ease economic sanctions on his authoritarian government. The political opposition has been weakened by persistent economic challenges, mass migration and political persecution by the government. Additionally, the former interim president Juan Guaido (in office 2019-23) failed to establish a parallel government. Nevertheless, the opposition has been reinvigorated by opposition leader Maria Corina Machado and presidential candidate Edmundo Gonzalez, who currently leads in opinion polls by a considerable margin.

Machado was disqualified from the presidential race after she won the opposition's unified primary in October 2023.

Her first stand-in candidate was also disqualified by the

electoral authorities, a body that is heavily influenced by Maduro and his United Socialist Party of Venezuela. Gonzalez was subsequently selected as the opposition candidate and has been campaigning alongside Machado at well-attended events across the country.

Despite Gonzalez's lead in polls, there are significant doubts regarding whether Maduro will allow a fair election to transpire. His government recently disinvited the European Union from observing the election, with observation missions from the Caribbean Community and the Carter Center pending. Opposition campaign workers and supporters have been detained in recent weeks as Maduro accuses the opposition of inciting hatred, threatening to continue punitive measures against those suspected of destabilising the country's politics.

Although the official campaign period begins on **4 July**, rallies, marches and related events have been occurring regularly since April, with large pro-opposition gatherings reported across the country. These have largely taken place in small and medium-sized cities in the country's interior, though events in the capital Caracas and other major urban centres are expected as the election draws closer. Large gatherings have been reported in Caracas in recent weeks as Maduro has begun to mobilise pro-government supporters.

Implications

The degree to which the security environment is affected by the elections will be largely dependent on the frequency of protests, civil unrest and government repression leading up to and following the polls. Disruption

is expected to be limited to localised disturbances and violence around campaign gatherings and marches ahead of polling day. Both opposition and pro-government events are likely to be well attended and cause considerable traffic disruption. Opposition rallies are more likely to be affected by the security forces and/or groups of motorised government supporters, known as 'colectivos', using forcible measures, posing incidental risks to bystanders in their vicinity.

While less likely, widespread civil unrest has the potential to arise should Maduro significantly interfere with the election process. Tactics could include using judicial manoeuvres to disqualify the opposition ahead of the election or declaring an unfavourable election result as fraudulent. Such a scenario could lead to significant anti-government protests across urban centres, particularly if the opposition continues to grow its support base ahead of the election. Maduro would likely deploy the security forces and colectivos to violently suppress opposition protests. This could take place across major urban centres. Previous anti-government protests affected upscale areas such as Chacao municipality (Miranda state). While unlikely, the possibility that Maduro foments or uses heightened tensions in the Essequibo region, which is administered by neighbouring Guyana but claimed by Venezuela, to suspend or nullify the election cannot be ruled out.

The period with the greatest potential for heightened security risks will occur in the week either side of the election. Any major developments during this period will increase the likelihood of anti-government protests taking place, as well as an accompanying violent response from the security forces and government supporters. During this period, the opposition would still be able to leverage its momentum and wave of public support. Conversely, actions to interfere with electoral processes further ahead of election day, or delayed manoeuvres to nullify the vote following the election would likely carry a lower possibility of widespread unrest.

Recommendations

Managers supporting workforce in Venezuela should review potential exposure to election-related gatherings and flashpoints for unrest should the situation escalate. They should ensure escalation protocols and business-continuity plans are up to date and capable of being implemented in the event of a significant escalation, even if such a scenario remains improbable. Managers should also consider seeking out information-sharing relationships with industry partners to enhance situational awareness for in-country workforce.

Foreign nationals stationed in or travelling to Venezuela should avoid political gatherings as a precaution. They should also exercise caution and avoid discussing political issues in public, particularly if working in non-governmental organisations or aid sectors. Domestic workforce should carefully consider the security risks associated with anti-government demonstrations when determining whether to participate in political events.

How we can help

- **Presence in-country:** An accredited network of logistics and security providers nationwide.
- **Services offered:** Ground transportation, meet-and-greet, security site assessments, evacuations and other assistance.
- **Activation time:** Up to 48 hours to activate, depending on location and availability of resources at the time of the request. Shorter in major urban centres.
- **Secure accommodation:** Yes.

If attending related rallies, avoid wearing clothes or other paraphernalia associated with political parties and vacate the area at the first sign of unrest.

Workforce should review routes taken during commutes to work and in other daily activities. They should plan journeys bypassing areas that may be affected by election-related gatherings. If undertaking essential journeys through such areas, verify the status of routes with local contacts and resources prior to setting out.

Main indicators of deterioration	Assessment
The lead-up to the election passes off without major instances of unrest	This could occur following continued detentions and harassment of opposition activists and supporters, which demoralises the opposition and leads to electoral loss. There is a lower likelihood of a scenario in which the opposition wins, but overall stability is maintained.
Controversial interference in the election by Maduro's government sparks anti-government protests and associated violence	Measures such as the disqualification of Gonzalez or a manipulation of election results by the government could prompt a wave of anti-government protests. These would likely involve violent suppression of protests by the security forces and pro-government groups.
Maduro's government takes unprecedented measures to suspend, nullify or otherwise significantly alter the election	The basis for such a move could include accusations by the Maduro government of foreign interference in the election or the declaration of a state of emergency related to border tensions with Guyana. Such a scenario is unlikely. The impact on the security environment would depend on the government's ability to deploy the security forces to maintain order, as well as the opposition's momentum and ability to organise anti-government demonstrations.

AMERICAS: ON WATCH

Bolivia: An increase in protests, which may include roadblocks on major roads, due to economic and political tensions is likely over the coming month. The deteriorating economic situation has caused intermittent fuel shortages and sporadic increases in food prices. A failed coup attempt on 26 June was resolved without major impact but the incident may weaken President Luis Arce's government.

Mexico: Localised violence will continue following the general election. Related armed attacks will be overwhelmingly targeted at local government officials, winning candidates and their close associates, though could pose risks to bystanders. Chiapas, Guerrero, and Michoacan states are the main hot spots for political violence. Alternation in political offices and security leadership will likely trigger shifts in the criminal landscape.

US: Expect protests and unrest following the criminal sentencing of former president Donald Trump (in office 2017-21) on **11 July**. Trump was found guilty on 34 counts related to illegal hush money payments. Pro- and anti-Trump protesters may gather outside the Manhattan Criminal Court or around Trump-associated locations in New York and Florida states.



INDIA

- The parliament's monsoon session, scheduled for **22 July-9 August**, will be important as it comes after the general, and several states' legislative assembly elections.
- Political activity and protests will increase as opposition parties and interest groups press for their pending demands.
- Expect protests in the capital New Delhi and other urban centres. Such demonstrations can be disruptive and occasionally turn violent.

Situation

The 18th Lok Sabha's monsoon session will be held from 22 July to 9 August in the capital New Delhi. The session will provide key details about the overall direction of the government's fiscal objectives and economic reform plans for the next five years.

In the recent general election, the Bharatiya Janata Party (BJP)-led National Democratic Alliance (NDA) won 293 seats in the Lok Sabha (lower house of parliament). By itself, the BJP won 240 seats and holds a majority in 12 of the 28 states. The Indian National Congress-led Indian National Developmental Inclusive Alliance (I.N.D.I.A.) won 232 Lok Sabha seats, of which the Congress won 99. The NDA won a majority in Andhra Pradesh, Arunachal Pradesh, Odisha

and Sikkim states' assembly elections. The BJP lost parliamentary seats in Karnataka, Maharashtra, Rajasthan, Uttar Pradesh and West Bengal states.

The BJP, facing a reduced majority in parliament, may reconsider pending bills and legislations. This could lead to delays in passing key bills, including the Digital India Act 2023 which aims to provide evolvable rules for emerging technologies and insurance law amendments. Policy outcomes on tax reform, infrastructure investment, power distribution, railway reform and local government funding will also be discussed.

The Uniform Civil Code (UCC), which aims to create a uniform legal framework for all citizens irrespective of their religion, will also be discussed. Multiple protests were held in Uttarakhand state before it became the first state to pass the bill in February.

The Agniveer Scheme, which will be discussed, has led to multiple protests in Bihar, Haryana and Uttar Pradesh states. The scheme has faced criticism for retaining only 25% of the armed forces' candidates after the four-year service period and offering no pension or gratuity post-retirement.

In December 2023, the Supreme Court's constitutional bench upheld the union government's decision to abrogate Article 370, which granted special status to Jammu and Kashmir union territory. However, its restoration is contingent on the state of the security environment and parliamentary discussions. After five recent terror attacks, the on-ground security and the upcoming Jammu and Kashmir legislative assembly election will be discussed.

Three new laws replacing the existing criminal code, will take effect from **1 July**. However, their revision of hit-and-run provisions sparked widespread protests by commercial vehicle drivers in Andhra Pradesh,

Chhattisgarh, Haryana, Jharkhand, Karnataka, Maharashtra, Punjab, Tamil Nadu and West Bengal states. The demonstrations led to fuel shortages, shutdown strikes and road blockades. The opposition I.N.D.I.A. bloc may intensify its narrative around the grievances and demands of commercial vehicle and truck drivers.

Implications

Demonstrations will be driven by parliamentary proceedings and the key issues addressed. Ongoing protests, even in other states, will gain momentum during the session.

Demonstrations against the Agniveer Scheme are likely as army aspirants have been demanding an immediate rollback. Protests in parts of Bihar, Haryana and Uttar Pradesh have seen vandalism and roadblocks, and prompted internet suspension.

Several student and youth wings affiliated with political parties have held protests in urban centres over irregularities in medical and post-doctoral entrance examinations. Their protests are likely to be concentrated in urban centres. Likely flashpoints include public squares, central government and education ministry/department buildings, educational institutes and designated protest sites like Jantar Mantar (New Delhi), Freedom Park (Bengaluru, Karnataka) and Esplanade (Kolkata, West Bengal). Protesters, especially party workers, are likely to be detained if a gathering turns unruly.

Other issues include an ongoing farmers' protest at the Shambhu border (Patiala district, Punjab). Farmer's unions may attempt to mobilise towards New Delhi again or announce more roadblocks within Punjab.

Groups with large followings may announce marches towards the parliament building. While state capitals and urban centres may also witness demonstrations, such gatherings are not expected to escalate into widespread violence. Most protests will target Raj Bhavans (governors' residences) in state capitals and the offices of the BJP and state-ruling parties.

Expect an increased security force presence in areas where protests have been announced. The police may impose prohibitory orders (Section 144) around key government buildings to prevent unauthorised gatherings. They will have a zero-tolerance approach to unruly gatherings, especially in central New Delhi and state capitals, and are liable to use forcible measures to disperse demonstrators. The security forces will install barricades and use water cannon to stop marches towards government buildings. Traffic restrictions are expected along routes near parliament area during the session.

How we can help

- **Presence in-country:** An accredited network of logistics and security partners.
- **Services offered:** From meet-and-greet and ground transport services to assisting with evacuations.
- **Activation time:** Up to 24-48 hours to activate, depending on location and availability of resources at the time of the request.
- **Secure accommodation:** Yes.

Recommendations

Managers should liaise with local contacts and monitor our alerts for information on political developments and any related protests. Maintain a communications plan and emergency communication protocols. Verify information and disseminate it on time. Ensure that alternative forms of communication are available in case the primary means experiences difficulties. Review business continuity plans and consider whether in-country workforce should work from home on days when major protests/strikes are planned.

In-country workforce should avoid all gatherings, even if they appear peaceful, due to the persistent risk of unrest. As a standard precaution during periods of heightened political tensions, avoid prominent landmarks and key government buildings. Reconfirm the status of routes if travelling through an area where protests are known to be taking place. Be familiar with security plans and protocols in case of an escalation.

Workforce should expect an increased police presence in major urban centres, especially near government offices, offices/residences of political parties/leaders and protests. Carry relevant identification documents to ease passage through security checks. Route selection should also avoid protest venues. Workforce should refrain from engaging in public discussions on sensitive topics. Avoiding perceptions of being linked to any political party significantly reduces exposure to violence.

Main indicators of deterioration	Assessment
Protests continue at their current levels	These gatherings are likely to be held amid heightened security and pass off peacefully, though they may cause localised disruption. Sporadic incidents of scuffles and forcible dispersals by the police may occur.
Demonstrations increase in frequency and impact, especially in urban centres	Significant disruption and a higher risk of unrest at gatherings, primarily due to police dispersal, are likely. However, widespread violence is unlikely and will not persist.
Protests increasingly turn unruly, especially in urban centres	The authorities are likely to impose restrictions on an intermittent basis, including bans on gatherings or internet services. Any attempts to defy the restrictions will be met with a strong police response. Widespread violence is unlikely.

KOREAN PENINSULA

- Tensions in the Korean peninsula have increased due to the series of tit-for-tat actions and military activities by North and South Korea.
- With the suspension of their bilateral military agreement (CMA), aggressive posturing is likely to be seen in the short term.
- Russian president Vladimir Putin recently paid a visit to the capital Pyongyang, during which the two countries signed a comprehensive strategic partnership treaty.

Situation

For almost a year, North and South Korea have resorted to tit-for-tat actions, progressively amplifying the tensions along the Korean peninsula. This comes amid South Korea's decision to resume military drills near the demilitarised zone (DMZ) and the Northern Limit Line (NLL, the disputed maritime demarcation line) following the suspension of the inter-Korean 2018 CMA. This was in reaction to North Korea's trash-filled balloon campaign, which saw more than 1,600 such balloons flown towards South Korea. South Korea, in retaliation, has resumed loudspeaker broadcasts along the DMZ.

In the year to June 2024, North Korea has carried out six ballistic missile and six cruise missile tests. Additionally, it has carried out satellite launches and tested underwater drones, hypersonic missiles and solid-fuel engine capabilities. It had also carried out artillery firing close to the NLL, prompting the South Korean authorities to issue evacuation orders for residents on Yeonpyeong and Baengnyeong islands.

In response to the North's military actions, South Korea has routinely held joint military drills with its allies including Japan and the US. The three countries held their first trilateral multi-domain military exercise in June. They had earlier held a two-day naval exercise in April involving the US nuclear-powered aircraft carrier USS Theodore Roosevelt. Moreover, along with the annual Freedom Shield bilateral exercise by the US and South Korea, the two countries routinely hold bilateral air, naval and military drills. In early-June, the two countries conducted air bombing drills involving US' B-1B bomber, the first such drill since 2017.

North Korea's growing military and diplomatic collaboration with Russia has also contributed to the increasing tensions.

Since 2023, there has been a marked increase in high-level diplomatic exchanges between the two countries, which culminated in Russian president Vladimir Putin's visit to Pyongyang on 18 and 19 June. The visit concluded with the two countries signing a 'Comprehensive Strategic Partnership' that promises immediate military assistance to each other in the event of war.

Implications

Despite the recent developments, we assess that the likelihood of North Korea launching a full-scale, conventional conflict against South Korea and the US is low. This is due to the severe consequences for all

involved. However, North Korea may resort to limited provocations along the land and maritime borders with the South, such as sending more trash-carrying balloons.

The South Korean authorities have reported repeated border incursions by North Korean soldiers along the DMZ. The incursions prompted the firing of warning shots by South Korea. According to South Korea, these incursions have been due to the North's attempts to reinforce the border by adding tactical roads and laying more landmines. Such incursions by the North along the DMZ will increase in the coming months.

North Korea's missile launches and tests underline its pursuit of more powerful and harder-to-detect weapons systems. Cruise missiles can fly low and manoeuvre, making them better at evading missile defences. North Korea has described its missiles as 'strategic', implying a possible intent to arm them with nuclear weapons. Its testing of nuclear-capable underwater attack drones highlights its attempts to reinforce its deterrence capability in the maritime sphere.

Hypersonic missiles, which travel more than five times the speed of sound, theoretically make it harder for adversaries to detect and react to a launch. Solid-fuel engine capabilities make it easier to move and conceal missiles, providing greater responsiveness during a crisis. Satellite launches by North Korea are prohibited by the UN as they are considered a cover for testing long-range missile technology. However, the North has largely ignored UN Security Council (UNSC) resolutions and the sanctions.

North Korea's increased military activity can also be seen in relation to its growing collaboration with Russia, especially amid the latter's conflict with Ukraine. Intelligence agencies have accused North Korea of supplying Russia with arms and ammunition in exchange for military technology and other supplies, including fuel. US imagery evidence indicates Russia's use of North Korea's Hwasong-11 class short-range ballistic missiles in Ukraine. This provides North Korea with a rare opportunity to test its weapons in real-world combat scenarios, and thus work to improve their performance. Furthermore, according to South Korea's National Intelligence

Service, North Korea's successful launch of its first military satellite in November 2023 can be attributed to significant design and data assistance from Russia.

Overall, we expect further provocative, though largely symbolic, North Korean military actions. The country typically launches missiles immediately before or after military exercises involving South Korea, around key dates, sensitive summits and following key statements by the South about regional tensions. The signing of the North Korea-Russia comprehensive strategic partnership will likely embolden North Korea to carry out further such military activities in the Korean peninsula. Such activities are liable to prompt deterrent actions, such as further military exercises and the imposition of sanctions by the US, South Korea and, potentially, Japan.

How we can help

- **Presence in South Korea and Japan:** An accredited network of logistics and security partners.
- **Services offered in South Korea and Japan:** From meet-and-greet and ground transport services to assisting with evacuations.
- **Activation time in South Korea and Japan:** Up to 24-48 hours to activate, depending on location and availability of resources at the time of request.
- **Secure accommodation:** Yes.

Recent developments indicate an escalation of tensions in the Korean peninsula, especially along the DMZ and NLL. The CMA prevented accidental clashes in the border regions and installed channels of communication between the two governments. With the agreement's suspension, there is an increased risk of tensions reaching previous levels, as last seen in 2017 when North Korea held a series of ballistic missile tests and issued nuclear threats to South Korea and Australia.

Recommendations

Elevated tensions could make it more difficult for organisations to make informed decisions, while exacerbating feelings of insecurity among workforce. Managers should closely monitor any developments related to the Korean peninsula using reliable sources of information and critical analysis.

The high-impact nature of any military confrontation requires that managers maintain robust plans to identify signs of a genuine escalation. Managers should also continue to closely monitor a series of triggers that could precipitate escalated tensions on the Korean peninsula and in the wider region. An increase in the level of North or South Korea's military preparedness, advisories issued by various governments, or North Korean actions which prompt military response could trigger an escalation in our advice. This may require a deferral of inbound travel and the maintenance of an appropriately heightened level of preparedness.

Main indicators of deterioration	Assessment
Hostile actions by North Korea such as weapons tests and low-level incidents such as trash balloons and 'accidental' border incursions	Expect such hostile rhetoric and tit-for-tat exchanges to continue in the absence of any channels of communications between the two.
Firing along the border areas (DMZ or NLL) leading to casualties	This could lead to a potential flaring of tensions along the border prompting retaliatory action. Both sides may announce further military deployments in the area. However, the situation is likely to remain contained to border areas.
Accidents stemming from missile tests, such as missile debris hitting an overflying aircraft, ship or Japanese territory	This could trigger Japan's J-ALERT (Japanese National Early Warning System) or civil defence drills in South Korea, asking people to seek shelter. The aftermath could prompt a limited military response from the US and its allies.
North Korea carries out an above-ground nuclear test	This would see aggressive military posturing by South Korea and its allies along with unilateral military sanctions.

NEW CALEDONIA (FRANCE)

- Unrest has persisted since protests broke out on 13 May over a controversial constitutional bill.
- The bill has since been suspended following the dissolution of the National Assembly in France's capital Paris.
- It remains likely that protests, roadblocks and clashes with the security forces will continue in the coming months since no political consensus has been reached.

Situation

Widespread protests broke out on 13 May over a controversial constitutional bill that sought to expand the electoral roll in New Caledonia (France) to residents who have stayed on the territory for at least ten years. Pro-independence groups have alleged that the bill would dilute the political influence of the indigenous Kanak population. While a major operation by the security forces has led to a considerable decline in the unrest, protests have persisted. Additionally, commercial flights have only partially resumed due to continued roadblocks along the RT1 highway between La Tontouta International Airport (NOU, South province) and the local capital Noumea. A curfew in Noumea and its environs continues to be renewed and is likely to remain in place over the coming weeks.

The unrest has led to significant economic ramifications, as arson and looting have impacted many businesses. At least 7,000 people have been left unemployed because of the unrest, with local reports suggesting that close to 36,000 jobs have been either directly or indirectly impacted. The local government has been reliant on Paris for support to keep businesses alive and for unemployment payments.

Youth groups of the Field Action Coordination Unit (CCAT), a militant faction of the Union Caledonie pro-independence party, have primarily led the protests. Pro-independence protesters are demanding a complete withdrawal of the constitutional bill. However, the protracted nature of the protests has also been driven by socioeconomic issues, such as youth unemployment and income inequality, on the territory. As part of ongoing security operations, on 19 June, the police arrested the leader of the CCAT and other pro-independence leaders. The arrests have heightened tensions, with increased clashes between the security forces and protesters and incidents of arson being reported.

The territory will also hold a French legislative election on 30 June. This follows the surprise dissolution of the National Assembly by French president Emmanuel Macron after his coalition's heavy defeat in the European Parliament election. The second round, if necessary, will be held on 7 July. In New Caledonia, candidates will be vying for two seats in the French National Assembly. Each constituency will have multiple candidates, with pro-independence and loyalist parties opting against backing a single candidate for each constituency.

Implications

Divisions between pro-independence and loyalist groups in New Caledonia have deepened since the start of the unrest. A lack of consensus between political parties in the New Caledonian legislative assembly has been

a major factor in the continuation of the protests. Efforts by the French government and Macron to facilitate dialogue between local groups have largely been unsuccessful due to political infighting and hard-line sentiments on both sides. Loyalist groups released a statement on 24 June expressing a lack of confidence in the pro-independence New Caledonian government and demanding the French government supervise the administration of aid on the territory. Daniel Goa, the president of Union Caledonie, has also shown a similar lack of desire to negotiate, unilaterally calling for complete independence by **September 2024**. Additionally, the arrest of pro-independence activists is likely to harden the stance of protest groups away from negotiations.

How we can help

- **Presence in-country:** An operations centre in Noumea and an accredited network.
- **Services offered:** Ground and air evacuation options.
- **Activation time:** Up to 24-48 hours to activate, depending on the location and the availability of resources at the time of the request.
- **Secure accommodation:** Yes.

The legislative election was called on 9 June after Macron's L'Europe Ensemble group experienced a loss by a large margin to the right-wing National Rally party. The dissolution of the National Assembly meant that the constitutional reform bill could not be voted on by Congress. Macron announced on 18 June that the process of the constitutional reform bill would be suspended. However, it is possible that the bill will be revived after the legislative election, especially if Macron's party or the National Rally wins, which is a key reason why protest groups have not relented.

Voter turnout is likely to be significantly reduced during the election as protests persist, particularly in parts of Noumea. The impact of protests on the election is likely to be most pronounced outside Noumea, in places such as Dumbea and Paita (both South province). Voter turnout in New Caledonia during the European Parliament election was recorded at 13.13%, significantly lower than in the previous such election. The security forces are also likely to restrict the number of polling booths to ease their operations.

Expect heightened security measures around polling centres, especially in Noumea. Protesters may attempt to target polling centres and disrupt the electoral process. While most roadblocks, including on the RT1 highway, have been lifted, protesters have shown the capability and persistence to quickly re-establish the blockades. This means that operations at La Tontouta International Airport could be disrupted at short notice. The election of loyalist candidates in the two constituencies in New Caledonia will likely garner a reaction from pro-independence groups.

Recommendations

Managers and in-country workforce should closely monitor developments and triggers amid the unrest and the French legislative election. This includes monitoring for announcements related to the sentencing of pro-independence activists, any escalations in tactics by pro-independence protest groups, announcements of the revival of the constitutional bill and allegations or reports of police brutality. Managers and workforce

should remain informed of developments through International SOS alerts and other reliable sources of information, and by liaising with trusted local contacts. Managers should have effective means of receiving and validating information about local incidents and be able to communicate with workforce in a timely manner.

Workforce should liaise with local contacts for information on protests and roadblocks in their area. Expect heightened security in affected areas. Clashes are possible between demonstrators and the security forces, who may respond with rubber bullets or tear gas.

Continue to anticipate sporadic disruption to airport operations and key routes, notably the RT1 highway. Itineraries should be decided with realistic contingency plans in place to cater for impromptu travel disruption.

Due to the risk of roadblocks, workforce should

liaise with their local contacts and security provider to ensure routes are clear before setting out. Do not attempt to cross or drive through roadblocks, as this may provoke a hostile response from protesters. Instead, turn around and seek an alternative route to your destination. Follow all official directives, including any curfews.

Main indicators of deterioration	Assessment
Persistent protests related to the constitutional bill occur	Small-scale demonstrations are likely to persist in the absence of a political consensus between pro-independence and loyalist forces on the territory.
The announcement of the sentencing of key protest leaders	The sentencing of key protest leaders, including Christian Tein, could represent a trigger for more violent protests overnight. This is likely to include arson targeting businesses, schools and local residences.
The reintroduction of the constitutional bill following the results of the French legislative election	The reintroduction would likely ignite sustained unrest by protest groups. The latter may also respond by escalating protest tactics by looking to shut down operations at key ports of departure and violently targeting the security forces and civilians.

ASIA-PACIFIC: ON WATCH

Japan: Campaigning is ongoing for the Tokyo gubernatorial election, which is due to be held on **7 July**. Political gatherings are likely at public squares and key intersections. Expect heightened security around political gatherings and plan journeys accordingly.

Regional: The monsoon period has begun in South and South-east Asia and is expected to last until October. The La Nina weather phenomenon will lead to above-average rainfall in several countries. Expect travel disruption due to heavy rain, thunderstorms and strong wind, which can cause flooding and landslides.

Sri Lanka: The country will hold a presidential election between **17 September** and **16 October**. Campaigning is likely to be heightened in July. Expect increased security measures near related events and plan journeys accordingly.



ARMENIA

- Anti-government protests will persist in the coming months as the border demarcation process and peace talks with Azerbaijan continue.
- A comprehensive peace agreement between the two countries is unlikely to be reached until major changes to the Armenian constitution are made. This would require a referendum.
- Political stability will continue to be affected in the coming months, but the opposition has yet to propose a credible alternative to the current government.

Situation

A wave of protests has been disrupting Armenia's political stability since April, after the government agreed to hand over four villages to neighbouring Azerbaijan. The agreement was struck as part of border delimitation talks between the two countries, which have been in mediation over territorial disputes for several years. The four villages, located in the north-east province of Tavush, were under Armenian control since the 1990s.

The protests, initially focused on denouncing the agreement, have grown into an expression of broader dissatisfaction with the government of Prime Minister Nikol Pashinyan. In June, protesters unsuccessfully asked the parliament to hold an impeachment vote to replace the government. Pashinyan's party holds a large majority of seats, which prevents the opposition from using parliamentary means to remove him from office. Despite this, protesters have continued to demand Pashinyan's resignation.

The opposition movement, known in Armenia as Tavush for the Homeland, has been led by Archbishop Bagrat Galastanyan since May. Galastanyan held a protest march from Tavush to the capital Yerevan in early May, garnering significant support along the way. He has since called for various marches and protests, including the blocking of roads in Yerevan. He also announced that he has temporarily stepped down from his religious duties to run for prime minister, in hopes of replacing Pashinyan if the movement is successful in driving him out of office.

The protests have mostly been peaceful and caused localised disruption, but clashes with the security forces have also occurred. Notably, on 12 June, protesters attempted to break through the barricades surrounding the parliament after Pashinyan announced that the peace agreement with Azerbaijan was near completion. This resulted in violent clashes between protesters and the security forces. At least 100 people were injured and 98 arrested, but the police successfully dispersed the protest. Previously, protesters organised several roadblocks between 24 and 26 April, including on major motorways around the country and several streets in Yerevan. Large, peaceful gatherings were also reported in early-May when Galastanyan addressed an estimated crowd of 20,000.

A comprehensive peace agreement between Armenia and Azerbaijan to resolve territorial disputes at the root of violent conflicts since the 1990s is yet to be reached. Most recently, Azerbaijan led a military operation in the Karabakh region (Azerbaijan), parts of which were under the de-facto control of a separatist ethnic

How we can help

- **Presence in-country:** An accredited network.
- **Services offered:** From ground transport services to assisting with evacuations.
- **Activation time:** Up to 24-48 hours to activate, depending on location and availability of resources at the time of the request.
- **Secure accommodation:** Yes.

Armenian administration. This resulted in the surrender of the separatists and the displacement of more than a 100,000 ethnic Armenians who constituted most of the local population. Cross-border fire and skirmishes regularly occur along the shared border, though these have decreased in frequency in recent weeks.

Implications

Political stability in Armenia will be heavily impacted by the status and progress of negotiations with Azerbaijan in the coming months.

Despite Pashinyan’s comment on the near final status of a comprehensive peace deal with Azerbaijan, a major obstacle remains. Azerbaijan has consistently stated that

no peace agreement is possible without a change in Armenia’s constitution, which calls for its reunification with Karabakh. Pashinyan has requested that the process of amending or redrafting the constitution begin, but changes to Armenia’s constitutional documents must be approved in a national referendum. Therefore, even if Pashinyan is successful, it could take months before the necessary amendments are made. Unless Azerbaijan changes its position on the matter, it is unlikely that a comprehensive peace deal will be reached in the meantime. The talks are instead likely to focus on further agreements on small stretches of border demarcation.

Although the agreement with Azerbaijan and the prospect of further concessions are widely unpopular, Pashinyan’s government is not under serious threat at present. The main opposition parties remain unpopular, mainly because they are dominated by veteran politicians who are seen as corrupt. In the absence of a credible parliamentary alternative, Galastanyan has emerged in recent weeks as a potential rival to Pashinyan. However, he holds Canadian and Armenian citizenship, and the constitution prohibits dual citizens from running for the premiership. He therefore remains an unlikely candidate.

Protests of varying scale will continue as long as peace negotiations are ongoing. Territorial disputes with Azerbaijan remain a highly emotive issue. Consequently, related protests have the potential to be well attended and disruptive.

Main indicators of deterioration	Assessment
Peace talks continue to produce limited border agreements over several months	Protests would persist, the scale of which would depend on the agreements reached. These would mostly cause localised disruption, but unrest could occur periodically.
The peace talks stall and fail to produce any result	Protests would likely reduce in scale, though the opposition would continue to ask for Pashinyan’s resignation. Border clashes would likely resume on a more regular basis.
A comprehensive peace deal between Armenia and Azerbaijan is reached	This is unlikely to occur in the short term but would likely trigger large-scale protests. The security forces will remain capable of containing unrest. There are no indications that this would result in a change of government.

Recommendations

Travel to Armenia can continue with standard security precautions despite the ongoing protests. Managers should ensure that in-country workforce has access to reliable information on related gatherings in their areas. Transport-related disruption should be expected near protests and accounted for when planning journeys. If travel near a demonstration is unavoidable, workforce should ensure routes are clear prior to setting out and allow additional time to complete journeys. Workforce should be instructed to follow all official directives and expect heightened security around flash points such as the parliament and public squares.

We advise to defer all travel to the international border with Azerbaijan, due to the risk of cross-border fire and military confrontation. We also advise to defer non-essential travel to the provinces bordering Azerbaijan (Gegharkunik, Syunik, Tavush and Vayots Dzor), which we assess as HIGH-risk areas. Although the security situation in these provinces is generally benign, low-level hostilities along the shared international border persist. Until a comprehensive peace agreement is reached, the threat of a more wide-ranging direct conflict in the region remains. Managers should ensure that workforce in HIGH-risk areas maintain a robust and resilient local assistance network and are ready to stand fast or relocate if conflict spreads beyond the immediate border areas.

FRANCE

- The Paris 2024 Olympic Games will be held from **26 July-11 August**. The Paralympics are scheduled to take place from **28 August-8 September**.
- Events will be held across the country, with the majority occurring in the capital Paris.
- Despite the LOW-risk nature of France's security environment, terrorism, social unrest and crime remain significant concerns.

Situation

France will host the 2024 Paris Olympic Games between 26 July and 11 August. The Paralympics are scheduled between 28 August and 8 September. Cities that will host events include the capital Paris, Bordeaux (Nouvelle-Aquitaine region), Lille (Hauts-de-France region), Lyon (Auvergne-Rhone-Alpes region), Marseille and Nice (both Provence-Alpes-Cote d'Azur region).

Islamist terrorism remains a key concern around the Games, with France being subject to attacks in recent years. The national terror threat level, known as Vigipirat, has been at its highest level since March. The extremist Islamic State (IS) group has released propaganda material calling for lone actors to attack France, including images of drones targeting tourist sites. There has been an increase of such propaganda by IS-aligned groups in recent months, some of which has urged supporters to recreate the attacks that occurred in Paris in 2015.

Thus far, two terror plots related to the Games have been disrupted.

On 22 May, the authorities announced the arrest of an individual allegedly planning an attack on a Games football match at the Geoffroy-Guichard Stadium in Saint-Etienne (Auvergne-Rhone-Alpes). In April, a teenager was arrested in Marignier (Auvergne-Rhone-Alpes) for allegedly planning a suicide bomb attack on a Games venue.

There are also risks from activism and social unrest, with France having a long-standing history of political protests and industrial action. In the first five months of 2024 more than 3,000 rallies took place across the country, with roughly 10% descending into violence and/or resulting in arrests. Demonstrations can be held over a variety of socioeconomic and political issues. Recently, rallies emerged across the country in opposition to far-right gains by the National Rally party in the European Parliament elections.

Implications

Due to the significant influx of both foreign and domestic visitors, accommodation options will be limited, particularly in Paris. Public transport systems, including metro, trams and buses, may struggle with overcrowding and long wait times. Private options will be difficult to source. In Paris, the implementation of security perimeters, as well as road and metro closures, will make travel across the city more arduous throughout the duration of the Games. Visitors will need QR codes to access certain areas of the city.

Although a heightened security force presence should serve to reduce the threat from petty crime, pickpockets continue to pose a risk to in-country workforce. Criminals, well-practised in targeting tourists, will seek to

target those demonstrating low levels of situational awareness. Crowded areas such as tourist hot spots and public transport services, particularly the metro, are locations where workforce is most vulnerable.

Large-scale, coordinated terrorist attacks that result in high numbers of fatalities are unlikely. Nonetheless, attacks conducted by lone individuals with rudimentary weapons remain sporadic in nature and cannot be ruled out. As with crime, however, the visibly bolstered security presence and associated perimeters should reduce the likelihood of a successful attack. Whether the calls for attack will be heeded by individuals in France remains to be seen. However, the aforementioned arrests indicate that some individuals have already been radicalised and may have plans to conduct an attack.

The ongoing Hamas-Israel conflict, and the resultant spread of information online, is likely to have radicalised additional actors in recent months. Such individuals may be present in France and neighbouring countries. Despite this, intelligence agencies will increase surveillance and operations before and during the Games. In response to the potential use of explosive-laden drones, the authorities have announced that there will be an anti-drone coordination centre outside Paris.

While social unrest is a common feature of the French security environment, protests decrease significantly during summer months. Mass movements, therefore, are unlikely to take place during the Games. However, smaller groups of radical activists, potentially those with climate-focused ideologies, may endeavour to use the exposure available during events to publicise their causes. Rallies may also take place around events in which Israeli or Palestinian sportspeople perform amid the Hamas-Israel conflict.

The timing of the Games lends itself to the probability of high temperatures and, thus, wildfires. Usually breaking out in the south of the country, they can lead to evacuation orders and road closures.

Recommendations

Workforce based in-country should discuss options for remote work with their managers in the lead-up to and during the Games. Expect increased travel time within urban centres due to road restrictions, related congestion

and an increased use of public transport. Those present in Paris should reconfirm the need for authorisation via QR codes to access certain areas and sites.

Liaise with local contacts for information on related protests in your area and avoid them due to the risk of unrest. If you come across a protest, leave an area at the first sign of unrest.

Be alert to suspicious behaviour and report anything unusual to the authorities. Security alerts or hoaxes may trigger the short-notice evacuation of transport hubs or public locations, which can cause disruption. Follow all directives issued by the authorities. Do not act upon unverified information.

How we can help

- **Presence in-country:** An accredited network.
- **Services offered:** From ground transport services to assisting with evacuations.
- **Activation time:** Up to 24-48 hours to activate, depending on location and availability of resources at the time of the request.
- **Secure accommodation:** Yes.

Due to the possibility of strikes, workforce should reconfirm travel bookings with the relevant service providers. In the event of cancellations or delays, your travel agent will be able to assist with alternative arrangements.

Managers should determine the need for non-essential travel to France from 1 July and throughout the Games due to an increased demand for accommodation and an upwards pressure on transport options. Managers with workforce in cities impacted by the Games should consider remote working arrangements where possible, taking into consideration office and workforce location, security perimeters and the potential for access restrictions to worksites, public transport, including metro station, closures and road restrictions.

Managers should ensure also emergency plans are up to date and tested, including the ability to account for workforce in the event of a crisis. Run personal training security awareness sessions with workforce planning to visit the Olympics, ensuring they are cognisant of common scam and theft tactics. Discuss an emergency response plan with workforce, including what to do if communications are cut off following a terror attack.

To pre-empt wildfires, Identify locations in advance to which workforce can evacuate and ensure adequate safety and security infrastructure is in place. Identify several different escape routes and practice using them during evacuation drills.

Main indicators of deterioration	Assessment
A large-scale, nationwide protest movement emerges during the Games	Although the probability of this occurring is low, it cannot be ruled out given France's active protest scene. Were this to occur, it would likely result in significant transport disruption across host cities.
Protests descend into unrest and/or looting	There is a low probability of this occurring. However, localised incidents, such as those involving alleged police brutality, can trigger widespread unrest.
Industrial action is taken by workers in the public transport sector	The French authorities will endeavour to appease unions in order to avoid such a scenario. If negotiations were to fail, however, strikes could cause significant transport disruption
A co-ordinated terror attack targeting stadiums or soft sites, including public transport OR A lone assailant using rudimentary weapons against the public	In the first scenario, a successful attack would result in numerous injuries and fatalities, with associated security measures being imposed. However, given the strong capabilities of the intelligence services, there is a low probability of this occurring. There is a higher likelihood of the second scenario occurring, given difficulties in forecasting and tracking the actions of lone attackers.

EUROPE AND CIS: ON WATCH



France: Expect further anti-far-right protests in the coming weeks. Nationwide demonstrations have broken out following the National Rally party's success in the European Parliament elections. Although for the most part peaceful, unrest can break out towards the end of rallies.

Georgia: Although protests over the so-called 'Foreign Agents' law have subsided, tensions remain heightened. Activists and opposition parties have denounced an intimidation campaign against them by government supporters. The parliament is now working on the adoption of an anti-LGBTQ+ bill, which has also sparked controversy, but is less likely to trigger large-scale protests.

Germany: The European Football Championships will continue until the final game on **14 July**. Although no significant security incidents have been reported thus far, incidents of hooliganism and clashes between rival fans have occurred at some matches.

ALGERIA, MOROCCO, TUNISIA

- Peak wildfire season in North Africa will arrive in July.
- Less damage is expected this year following record temperatures throughout Europe and North Africa in 2023. This will, in part, be caused by the end of El Nino cycle.
- Mountainous regions in the north of Algeria, Morocco and Tunisia will be the worst-affected areas of these countries.

Situation

Historically, wildfire season in North Africa begins and peaks in July, with the total number of hectares burnt typically reaching its highest level within the month. A residual level of risk remains until late-October, though fires later in the year tend to be less destructive than those in July.

Algeria is the worst affected by wildfires of all countries in the Middle East and North Africa region. Algeria's 2023 wildfire season was around historical average rates despite being higher than in 2022. The largest fire of the season occurred in Bejaia province. Most of Algeria's forested mountainous areas are at high risk of fire. In anticipation of 2024's forest fire season, the Algerian authorities have implemented new measures to combat wildfires. The development follows public criticism over the government's handling of wildfires in 2021, 2022 and 2023. The measures include additional firefighting aeroplanes, drones for spotting developing fires and ensuring ample water supplies for firefighters.

Following a record year for wildfire destruction in 2022, Morocco experienced a comparatively benign wildfire season in 2023. A combination of rising temperatures and dry soil have contributed to a rise in historical rates year on year. In terms of burnt area, Morocco's 2022 fire season was 683% worse than the average for the decade which preceded it. Morocco's northern regions have typically been the worst affected by wildfires. The Tanger-Tetouan-Al Hoceima region alone suffered 82% of the damage caused by the 2022 wildfires, with the two regions to the immediate south of it, Rabat-Sale-Kenitra and Fes-Meknes, also badly affected. The worst fires of 2023 occurred in the Aklim area of Oriental region, also in the north of the country. Ahead of the 2023 wildfire season, Morocco's National Agency for Water and Forests has indicated the most likely provinces to be affected by forest fires in 2024. These are Beni Mellal and Khenifra (Beni Mellal-Khenifra region), Nador, Oujda Angad and Taourirt (Oriental region) and Al Hoceima, Fahs Anjra, M'diq Fnideq and Tangier-Assilah provinces (Tanger-Tetouan-Al Hoceima region).

Tunisia benefitted from a comparatively minor wildfire season in 2023. It experienced only two major fires, one in Jendouba governorate, near the border with Algeria, and one in Beja governorate. While Tunisia is generally less affected than Morocco and Algeria by fires, Bizerte and Jendouba governorates have historically been affected by major fires.

Implications

The chance for wildfires to start with little notice has an impact on overland road moves through mountainous areas liable to catch fire. As such, the authorities may prohibit travel in affected areas at short notice.

Poor air quality may also affect lowland areas close to fires. This is particularly likely in Algerian cities which typically lie in valleys near mountainous areas prone to forest fires. Short-term health effects include irritation of the eyes and nose, a sore throat, coughing, wheezing, shortness of breath, chest tightness, headaches and nausea. People more vulnerable to bushfire smoke include those who are pregnant, have chronic lung disease such as asthma, chronic obstructive pulmonary disease or cardiovascular diseases. Long-term exposure to poor air quality can result in reduced lung function (particularly in children), aggravation of cardiovascular disease, some cancers, diabetes and neurological diseases.

Main indicators of deterioration	Assessment
Officials warn of very high or extreme risk of forest fire	Monitor the weather conditions and remain aware of local fire conditions. Ensure that plans are in place for how to respond to any fires in the area.
A medium-scale wildfire is reported near an urban centre or work site	The authorities are liable to implement road closures in the vicinity of the fire. Officials may enact evacuation orders for locations that are expected to be in the path of the blaze.
The government issues health advisories for air quality	Monitor weather forecasts for locations where air quality is expected to be worst. Ensure that plans are in place to assist workforce with underlying health concerns that could be exacerbated by poor air quality.
A large-scale wildfire is reported in or near a major urban centre or work site	The authorities may suspend some services. For example, power may be turned off in areas that are susceptible to fires. Mandatory and voluntary evacuations and other movement restrictions are likely. Areas under threat from the fire may change rapidly as the blazes can move quickly and change direction based on weather conditions.

Recommendations

Managers with interests in areas frequently affected by wildfires should pay close attention to official sources, such as Morocco’s National Agency for Water and Forests (ANEF), whose website features an interactive map displaying wildfire risk. Ensure that you have the most up-to-date information on any ongoing fires and the latest meteorological information that could affect wildfires or areas that have recently burnt. There should be a robust relationship between workforce and local fire officials to quickly report fires near work locations.

Work sites or offices should be reinforced against the risk of wildfires. Those investing in new facilities should consider using fire-resistant material during the construction process. Vegetation near work sites should be cleaned frequently to reduce the risk of its catching fire. Workforce should patrol structures and property. They should extinguish any small fires if it is safe to do so. They should also ensure that facilities have multiple sources of water for fire suppression and that emergency vehicles can easily access the worksite.

How we can help

- **Presence in-region:** An accredited network.
- **Services offered:** From ground transport services to assisting with evacuations.
- **Activation time:** Up to 24-48 hours to activate, depending on location and availability of resources at time of request.
- **Secure accommodation:** Yes.

Facility air handling should be reviewed, engaging Heating Ventilation and Air Conditioning (HVAC) specialists for recommendations on equipment and maintenance to optimise indoor air quality.

As wildfires can develop swiftly, there must be policies in place so that situation updates on the fire, including how operations will change and recommendations to local workforce, are quickly disseminated. These plans should be up to date, well-rehearsed and fully understood by all stakeholders.

All travel itineraries should be flexible to account for fires and the possibility of evacuation orders. Transport disruption is likely and severe fires can also affect

operations at local airports. Trip planners should closely monitor the status of fires, as well as ash clouds, that can be a health hazard to vulnerable populations.

Workforce in areas susceptible to fires should prepare a grab bag containing essential supplies, including water, high-energy food, essential medication, critical documents, spare batteries, a radio, fully charged communication devices, a first-aid kit and torches (flashlights), and respirator. They should also have personal evacuation and communication plans in place in case the authorities issue evacuation orders. These plans should have firm triggers for when to evacuate.

As operational concerns will continue even after the fire has passed, plans must be in place to account for the increased risks of flooding and landslides. Additionally, there must be resources in place for workforce who may have lost property in fires.

EGYPT

- Unpopular economic reforms have the potential to generate widespread anti-government sentiment and public discontent in the coming months.
- Socio-economic grievances will manifest more frequently, including in the form of sporadic strikes, as living conditions deteriorate.
- The risk of lengthy prison sentences and the security forces' readiness to use heavy-handed measures will, however, deter disruptive anti-government demonstrations.

Situation

Egypt continues to experience a deepening economic crisis, with spiralling inflation, reduced foreign exchange inflows, subsidy reductions, mounting foreign debt and a drastic depreciation of the Egyptian pound. This economic strain has led to an increase in the price of basic goods, such as bread, fuel and other essential commodities.

As part of its broader economic reforms aimed at reducing the financial burden, including subsidies on the state budget, the government on 29 May announced that the price of subsidised bread would increase by 300% from 1 June. The decision came amid significant economic pressure caused by high inflation, which reached a peak of 40% in August 2023 before stabilising around 28% in May.

The Egyptian pound has devalued to a record low of 49 pounds per dollar in March. The devaluation was part of the International Monetary Fund's (IMF) support programme, which required Egypt to preserve macroeconomic stability by engaging in fiscal discipline, adopt tight monetary policies and shift to a flexible exchange rate.

According to local media sources, further price hikes are on the horizon as the government is set to raise tariffs for gas transmissions in July. This decision would likely reverberate across the domestic market and affect end-consumers of gas across the country. It also coincides with fuel shortages and prolonged power cuts that have hit the country since mid-April. Notably, Egypt paused Liquefied Natural Gas exports and increased its imports between April and June to meet domestic demand. However, this has put additional strain on the already-battered local economy.

Historically, subsidy cuts on essential commodities have been a catalyst for industrial action, including strikes and demonstrations. However, despite the recent deterioration in the economic situation, related unrest has not materialised. Thus far, critics have mainly launched social media campaigns condemning price hikes.

Earlier in March, the IMF agreed to expand its financial aid package for Egypt from \$3bn to \$8bn. The IMF has also pledged to immediately disburse \$820 million of the total bailout package, while the remaining sum will be distributed in subsequent instalments. The deal came shortly after the country signed a \$35bn deal with the United Arab Emirates (UAE) to develop the Ras al-Hekma project. This entails the redevelopment of a section of the Mediterranean coast between Alexandria (Alexandria governorate) and Marsa Matruh (Matrouh governorate).

While these injections of foreign aid mark a positive development, they do not address immediate public grievances linked to the deterioration of living conditions. Furthermore, despite a recent cabinet reshuffle in June, the government's strategy for stabilising the economy and responding to the public demands remains uncertain.

Implications

The recently imposed economic reforms and foreign investments have the potential to improve the country's economic situation in the long term. However, issues around soaring inflation, rising prices on essential commodities and disruption to provision of essential services are likely to persist in the coming months.

Economic difficulties will continue to exacerbate the logistical challenges, which are also not expected to be resolved over the coming months. As such, prolonged power cuts and fuel shortages are likely to worsen over the summer months. This will have immediate and tangible impacts on organisations navigating the country's economic crisis. More-frequent power outages, coupled with difficulty in sourcing fuel for backup generators, could affect access to reliable internet services and mobile connectivity in parts of the country. The deteriorating economic situation is also liable to prompt an increase in petty and opportunistic crime in urban centres, including the capital Cairo.

As living conditions continue to deteriorate, anti-government sentiment is expected to grow. Widespread unrest prompted by these mounting grievances, however, remains unlikely. This is due to several factors, including the government's tight control over the internet and social media, risk of lengthy sentences and the security forces' readiness to use heavy-handed measures to disperse crowds. Nevertheless, strikes and localised demonstrations are possible. These can turn disruptive and result in clashes between participants and the security forces.

The economic effects of the ongoing conflict in neighbouring Gaza Strip (Palestinian Territories) and attacks by the Yemen-based Houthi rebel group on the Red Sea shipping off the coast of Yemen will continue to exacerbate Egypt's economic challenges. The Houthi's actions have led to disruption in maritime traffic through the Red Sea, impacting Egypt's Suez Canal revenues. This has further strained the country's economy.

How we can help

- **Presence in-region:** An accredited network.
- **Services offered:** From ground transport services to assisting with evacuations.
- **Activation time:** Up to 24-48 hours to activate, depending on location and availability of resources at the time of the request.
- **Secure accommodation:** Yes.

Regional powers consider Egypt, a key regional diplomatic and security actor, too important for domestic stability to default. Nonetheless, international organisations such as the IMF, as well as longtime bilateral donors, including the UAE, will remain reluctant to continue pouring financial assistance to the country. Egypt, however, will find it difficult to implement some of these, particularly the demand for reduction of state and military involvement in the economy. As such, a lack of comprehensive reforms would hamper the revitalisation of the country's economy and affect the inflow of foreign aid.

Recommendations

Organisations with operations in major cities should pay close attention to any signs of increasing popular discontent with the government in the coming months. Although widespread demonstrations remain unlikely, tensions persist and any subsequent protest may elicit a forcible response from the authorities, posing incidental risks to bystanders. Managers should monitor for protest triggers, including government policy changes deemed unfavourable to purchasing power.

Workforce should also monitor international SOS alerts and have access to verified and up-to date local sources that will disseminate timely information on potential rallies. If workforce come across a gathering, they should anticipate an increased police presence and follow all official directives.

Managers should ensure that business-continuity plans account for power supply disruption and clearly outline measures to implement during outages. This includes monitoring power-outage schedules and planning business-related activities and travel around these schedules. During power outages, people should ensure they have access to sufficient backup lighting, including torches, and switch off appliances and equipment that are sensitive to electrical surges to avoid damage to these items. Workforce should ensure that mobile phones, laptops and other devices are always charged and consider purchasing power banks and backup batteries.

Main indicators of deterioration	Assessment
Socio-economic deterioration prompts an increase in crime targeting expatriates	Foreign nationals remain an attractive target for such attacks due to their perceived wealth. Protracted economic strains could lead to a rise in petty and opportunistic crime, as well as violent crime against international assignees. The trend is likely to intensify as the local population grapples with high unemployment rates and soaring inflation.
Prolonged power cuts or load-shedding persist	High rates of load-shedding and prolonged power cuts will persist over the coming months. Government efforts to address this issue will get slow results.
Socio-economic grievances grow, prompting an increase in the frequency of strikes and disruptive protests	Tensions over economic grievances, particularly sharp rises in the price of essential commodities, may prompt an increase in industrial action, including strikes and localised demonstrations. However, the security forces' readiness will deter widespread protests and well-attended gatherings.

YEMEN

- Growing divisions between rival administrations and flare-ups of violence along the front line reflect heightened tensions and the risk of escalation.
- As the UN-led peace process stagnates due to the maritime escalation, tensions are likely to further rise in the coming months.
- International organisations' foreign and domestic workforce continue to face an elevated risk of arbitrary detention, as evidenced by a recent spike in arrests.

Situation

Tensions between the Houthis and the internationally recognised government (IRG) are escalating in Yemen as mediation efforts stagnate amid the Israel-Hamas conflict.

Although the ceasefire agreed to in April 2022 is still largely holding, significant flare-ups have occurred in recent months along the front line which divides Yemen between areas controlled by the IRG and the Houthis. In early-June, 18 Houthi fighters were killed during an offensive by the group on IRG-held territory in Lahij governorate. This followed fighting in the same area in April, during which more than 20 combatants were killed. Since January, there have been credible reports of a military build-up near the front line in Marib governorate, with the Houthis threatening an offensive to take control of oil production sites. More generally, there have been frequent reports of shelling, sniper fire, intermittent fighting and drone attacks along the front line in Al-Dhale, Hodeidah, Lahij, Marib, Saada, Shabwa and Taiz governorates.

Growing divisions between the Houthis and the IRG have exacerbated tensions. Most recently, the country's monetary policy has emerged as one of the major points of discord between the two sides. Although the Yemeni Rial is used throughout the country, the Houthis have not recognised bills printed by the Aden-based Central Bank since 2019. Use of these bills is therefore prohibited in the heavily populated Houthi-controlled territory, including the capital Sanaa. Since the Houthis lack the technology required to print currency, the wear and tear on older bills has caused a severe shortage of liquidity in these areas. In late-March, the Houthis announced they would mint 100-rial coins to replace the damaged bills. In response, the Aden-based Central Bank warned citizens against dealing with unauthorised currency and ordered all banks to relocate their headquarters from Sanaa to Aden (Aden governorate). Most banks have refused to comply with the order.

In addition to domestic tensions, recent unilateral US sanctions could prevent international funds from reaching the Houthis if they continue attacking international shipping lanes. This would put further pressure on the availability of cash, aggravating the humanitarian crisis faced by the population. It could also jeopardise the UN peace roadmap adopted in December 2023, which includes a substantial payment to be made to the Houthis to pay for civil servants' salaries.

Another important sign of the rising tensions is a recent spike in detentions of personnel employed by humanitarian organisations operating in Houthi-controlled areas. In June, reports emerged that the Houthis had detained more than 50 Yemeni employees of international and local humanitarian organisations, including

at least 13 UN staff. The Houthis claimed the arrests targeted those suspected of espionage on behalf of the US and Israel. In May, 44 people were sentenced to death by a Houthi court for allegedly collaborating with the enemy, including a Yemeni businessman working with foreign aid organisations. According to International SOS contacts on the ground, these developments prompted several humanitarian organisations to relocate their workforce from Sanaa.

Despite these developments, UN-led mediation efforts in Yemen continue against the backdrop of the maritime escalation in the region. The UN Special Envoy to Yemen confirmed in May that negotiations between Yemeni parties are still ongoing, albeit at a much slower pace, with the support of Saudi Arabia and Oman.

Implications

The UN-led peace process is unlikely to be prioritised by local and international actors until the active phase of the Israel-Hamas conflict is concluded. The Houthis will continue to target vessels in the region until a ceasefire is agreed to in the Gaza Strip (Palestinian Territories). Attempting to stop these attacks will remain the focus of foreign diplomatic and military activity with regards to Yemen.

As the Yemeni peace process continues, heightened tensions between the Houthis and the IRG will persist. Their resistance to accepting each other's currency can be seen as a strong indicator of their overall lack of willingness to compromise and cooperate. Rivalry between the two sides will risk jeopardising mediation efforts and make it increasingly difficult to design a comprehensive deal for lasting peace.

The current ceasefire is only the first step in the peace process, which also includes the creation of a post-war administration supported by the Houthis, the IRG and other affiliated groups. This will become increasingly complex as the Houthis and the IRG cement their respective positions and authority in the divided parts of the country.

While the peace process is unlikely to be discarded as a whole, fighting between the Houthis and the IRG could escalate in the coming months. Saudi Arabia, in particular, has shown continued commitment to the mediation efforts and respect for the 2022 ceasefire. However, the deepening rift between the Houthis and the IRG, accompanied by more frequent flare-ups of associated violence, may indicate an eventual return to armed conflict.

Such renewed intensive fighting would occur along the largely static front line, with each side attempting to take control of a larger portion of the other's territory. Marib and al-Dahle governorates, the Lahij-Taiz border and the city of Taiz (Taiz) would be likely hot spots, while areas further from the front line would be less affected.

How we can help

- **Presence in-region:** International SOS has a fully staffed 24/7 Assistance Centre in Dubai (UAE).

Foreign and domestic workforce employed by international organisations in Houthi-controlled areas will continue to face a heightened risk of arbitrary detention. While this risk has always been present, it has now become elevated amid ongoing joint foreign military operations against the Houthis spearheaded by the US and UK, as

well as ongoing Israeli operations in the Gaza Strip.

Recommendations

We continue to advise against all travel to Yemen, which we rate as an EXTREME-risk location.

If determined to remain in the country, a robust and resilient local-assistance network (logistical, security and medical) should be in place, as well as access to secure transport, accommodation, power, communications, fuel, food, water, medication and other goods. Maintain stocks of essential supplies at your accommodation. Preparations should include stockpiling food and water, as well as backup power supply and sufficient cash for daily expenses. Minimise time spent outside your secure accommodation. Any essential movement should be co-ordinated with reliable local

contacts and requires robust profile-specific journey-management protocols and secure transport arrangements, which should include access to the latest threat intelligence, route status and a knowledgeable local driver with local language capability. Travel between areas controlled by different authorities requires enhanced caution and planning due to the challenges in navigating checkpoints and the need for additional permits and documents.

Managers should monitor local and regional developments that could lead to further restrictions of the already limited departure options. This includes a resumption of hostilities along the front line and increased international operations against the Houthis.

Main indicators of deterioration	Assessment
US sanctions prevent the delivery of all international payments to the Houthis, including what was already agreed upon as part of the UN-led peace plan	This has the potential to derail the peace process. In this scenario, the Houthis would likely return to fighting and attempt to gain more territory along the front line.
An increased frequency and intensity of fighting along the front line between groups affiliated with the IRG and the Houthis	Increased flare-ups of violence along the front line may not necessarily prompt an immediate breakdown of the peace talks. Nevertheless, it would reflect a heightening of tensions that could be a precursor to a resumption of full-scale fighting.
A bilateral peace deal is reached between the Houthis and Saudi Arabia, excluding the IRG and affiliated groups	This would result in further violence in the country as the Houthis would feel emboldened and resort to fighting to capture more territory. The fracture among Yemeni parties to the conflict would make it nearly impossible to create a post-war administration for the entire country.

MIDDLE EAST AND NORTH AFRICA: ON WATCH

Iran: Monitor developments following the **28 June** presidential election. The outcome of the election is unlikely to prompt any major shifts in the country's domestic or foreign policy, which is dictated by Supreme Leader Ali Khamenei. Heightened security can be expected around the announcement of the results. Public gatherings should be avoided as a precaution.

Regional: Intense Israel-Lebanon cross-border hostilities will persist, driving further risks of escalation and spillover of violence deeper into both countries' territories. In June, the Lebanon-based Shia Muslim movement Hizbullah launched over 200 projectiles into Israel in retaliation for an Israeli strike that killed the group's top commander. Israel is facing increased pressure to step up its operations against Hizbullah.

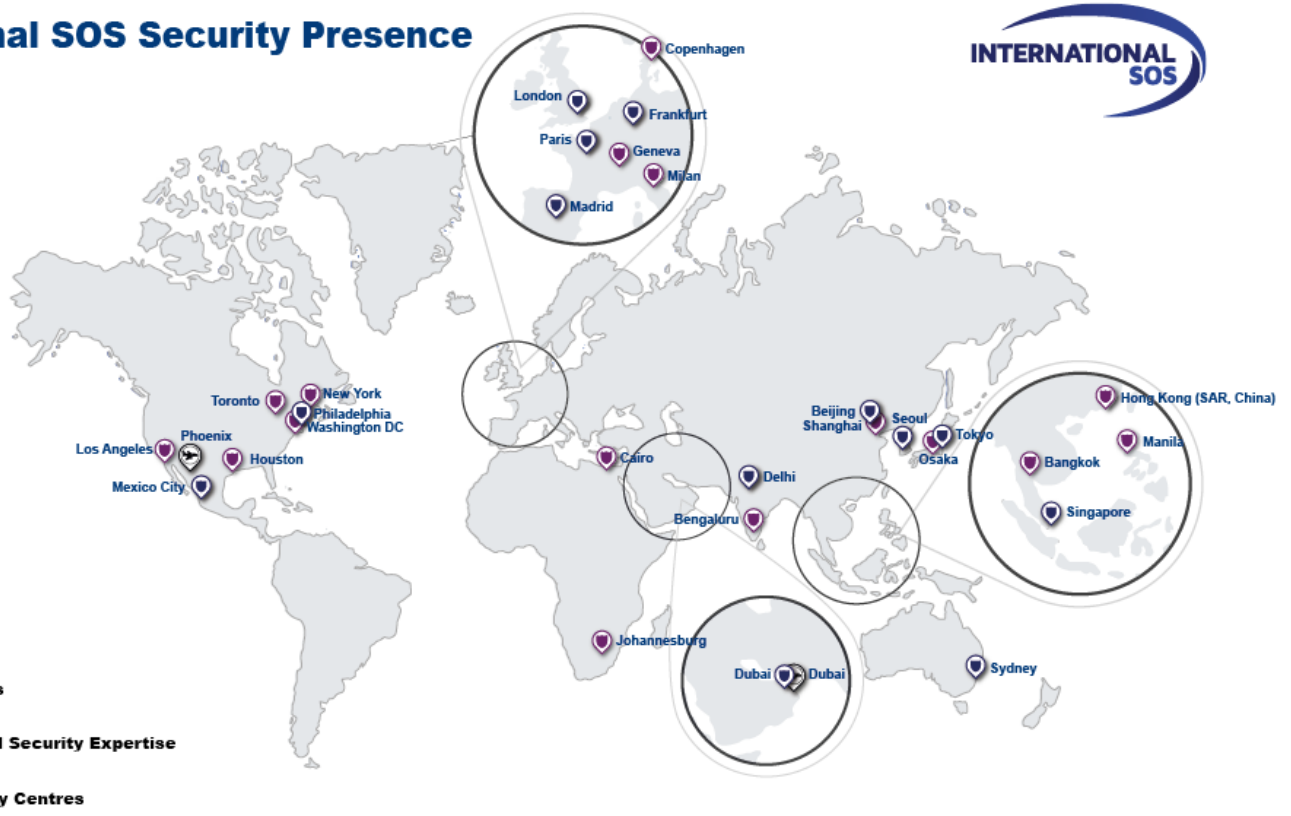
Syria: Tensions will be heightened in the country's north-east as the Kurdish-led administration plans local elections for August. Originally scheduled for June, the elections have been postponed amid opposition from the US. Turkey sees the elections as the first step towards the creation of an autonomous Kurdish state and has threatened a military operation in the region.



ACTIONABLE INSIGHTS AND UNPARALLELED SERVICES

International SOS and its network of partners combine the world's leading security and medical risk specialists. With an access to over 3,200 security specialists led by our 200 dedicated security experts based in our Assistance Centres and offices around the world, we provide a comprehensive suite of integrated security risk services for the global workforce and managers tasked with keeping people safe, secure and healthy. We deliver timely, actionable security intelligence, analysis, advice and on-the-ground assistance.

International SOS Security Presence



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