# GLOBAL RISK FORECAST

# 2024

Context and clarity
for the year ahead.

CRISIS24

Prepared for:

AIG

# Foreword

Crisis24 Global Intelligence is one of the longest-established geopolitical risk intelligence teams today. We built our capabilities based on best practices of government intelligence community tradecraft for integrity, ethics, and objectivity. We serve organizations from the largest manufacturing and technology companies to modestly resourced nonprofits truly doing good things for our global communities. Our intelligence analysts believe every intelligence report may save a life or protect a business.

Today, we master the advances in Open-Source Intelligence (OSINT), such as multispectral satellite imagery and real-time information gleaned from smartphones on the battlefield and in the streets of the revolutions. While others are late to the science, Crisis24 has an artificial intelligence (AI) capability perfected over the past five years, giving us greater speed and accuracy in our intelligence. Our 180 subject matter experts have advanced degrees and business sense. They provide sharp context and insights that only come with life skills and academic study. Our intelligence team reflects the world we live in; more than 75 percent of our analysts are citizens of the countries they monitor. Speaking the languages, knowing the cultural nuances, and understanding the political history of a country form an unmatched bulwark against the flood of disinformation.

What does 2024 hold for us? The map and economies of Europe are reshaped as a petulant Moscow grasps for the faded glory of Imperial Russia. The EU is tested and stands fast against the existential threat to Ukraine's survival. NATO expands, and at the same time, Armenia absorbs thousands of citizens from Nagorno Karabakh.

As national pride morphs into nationalism among European and Latin American nations, the political process becomes a weapon against "the others" in the population. This opens generational wounds in education, income, health, and opportunity that will not heal. These will fester into ethnic struggle, political paralysis, and fractured borders for decades.

A 2024 US presidential election will likely be so polarized by disinformation and distrust it will hold little hope for compassionate compromise for US politics. In Latin America, rising crime and virulent drug cartels provoke draconian responses by authoritarian regimes.

The October 2023 attacks by Hamas and the Israeli response shattered the progress of Middle East diplomacy. Throughout 2024, lives, business, and diplomacy will be broken as regional and global powers jockey for dominance in the Levant.

The rumble of the youthquake in Africa approaches as the youngest population on earth and the largest workforce reshapes the continent over the next decade. Every other African has a mobile phone—a digital talisman to move money, launch revolutions, stoke frustrations, and feed dreams.

A dozen elections in Asia will likely confirm the incumbents, embolden the winners, and frustrate the opposition. China continues to struggle with a stalled economy and the associated domestic challenges while juggling the demands of Great Power competition. New manufacturing centers in the Asia region bring influence, affluence, and bind their economies closer to the West.

Technology unleashes innovation in peace and warfare, as the feasibility of autonomous, electric commercial aviation moves from concept to the tarmac. Great navies cower from the threat of ubiquitous surveillance and lethal autonomous sea drones. Rapid advances in AI force governments to race ahead in a vain attempt to put the genie back in the bottle.

You deserve concise, unbiased facts about the threats your organizations face in a turbulent world. Crisis24 commits resources, technologies, and highly competent professionals to deliver world-class geopolitical risk intelligence 24/7/365.

**W. Michael Susong**
Senior Vice President, Global Intelligence
Crisis24

## Executive Summary

Myriad threats and crises will impact travel, business operations, and the safety of employees in 2024. Insecurity in Africa will be a pressing issue, but the resource-rich continent will increase energy exports. Military and transitional governments in various West African countries are likely to struggle with maintaining stability and security. The withdrawal of peacekeeping forces from several high-threat countries will lead to security vacuums. Notwithstanding these challenges, investment in the energy sector and energy exports are expected to rise.

Geopolitical polarization will be a major theme in the Asia-Pacific region. China and the US will look to counter each other's influence in East Asia, with Taiwan being the epicenter of these tensions. Most other countries will be divided into US- and Chinese-led blocs. In several countries in South and Southeast Asia, the influence of the military in domestic politics will continue and, in certain instances, increase.

The consequences of Hamas' Oct. 7 attack on Israel and the subsequent Israeli response will fundamentally alter the Middle East in 2024 and beyond. The escalation of hostilities between Israel and Hamas not only has the potential to expand into a wider regional conflict, but civilian casualties in Gaza will likely inflame anger in the "Arab street," potentially increasing pressure on their leaders to respond. An increase in both antisemitic and Islamophobic acts will likely continue globally as a direct result of the conflict.

The appeal of populism will increase in several European countries, as the region struggles with the fallout from the Ukraine conflict, mass immigration, and weak economic growth. The war of attrition, which has begun to define the conflict in Ukraine, will continue to grind along as both Russia and Ukraine fail to make any substantial gains in the coming year. Türkiye will deftly try to strike a balance with its relations with the West and Russia, while maintaining its influence in the region.

In the Americas, two significant issues will be the expansion of organized criminal networks in Latin America and the upcoming US presidential election in November 2024. In Mexico, drug trafficking organizations are likely to expand their operations into other countries in the region, while in Brazil, criminal gangs will transform into major international criminal syndicates. The US presidential election, an expected rematch between President Joe Biden and former President Donald Trump, will have important security ramifications for the country and the world.

Of global importance, 2023 is almost certain to be confirmed as the hottest year on record and 2024 is forecast to be even hotter. Numerous temperature records have been broken in the past year, accentuating the effects rising temperatures are having on many areas of our lives. One area where climate change is having a profound impact is health, especially in developing countries where healthcare resilience is weak. Elsewhere, we will likely see increased wildfire activity, agricultural yields being impacted by droughts, and disruption to energy and utilities. Tourism trends may begin to shift as holidaymakers avoid areas where excessive heat and increased wildfire activity are becoming more commonplace, such as southern Europe.

In the maritime domain, developments in the Arabian Peninsula and the South China Sea are likely to impact global maritime trade through 2024. In the Arabian Peninsula, improved relations between Iran and Saudi Arabia and relative calm in Yemen after years of conflict gave hope of improved maritime security in the region. However, the intensification of hostilities between Israel and Hamas has the potential to undo this. In the South China Sea, a territorial dispute between China and the Philippines over the Spratly Islands has resulted in several incidents; should the trend continue, it could cause disruption to one of the world's most important shipping routes.

Rapidly changing technology will also impact multiple areas—in air travel, for example, increasing use of biometric data and artificial intelligence (AI) is removing processing frictions. In addition, not only are drones now increasingly being used to deliver small packages, but many companies and regulators are now actively working to introduce uncrewed passenger drones—essentially air taxis—within the next decade.

AI is likely to be further integrated into business processes, boosting productivity, as well as cybersecurity. These advances will also bring new challenges: AI-driven technologies will facilitate the fabrication of fake news, videos, and social media posts that will be virtually indistinguishable from authentic content. These could spread at an unprecedented scale and speed, undermining public trust and social stability. AI-driven misinformation and disinformation campaigns could not only have a huge security impact, but could even pose a threat to democracy.

In short, as we enter 2024, our brave new world faces diverse challenges. While some entities might be unaffected by events in Gaza or Ukraine, it is very unlikely that anyone will be entirely immune from the security and operational impacts contained in this forecast.

MYRIAD THREATS AND CRISES WILL IMPACT **TRAVEL, BUSINESS OPERATIONS, AND THE SAFETY OF EMPLOYEES** IN 2024.

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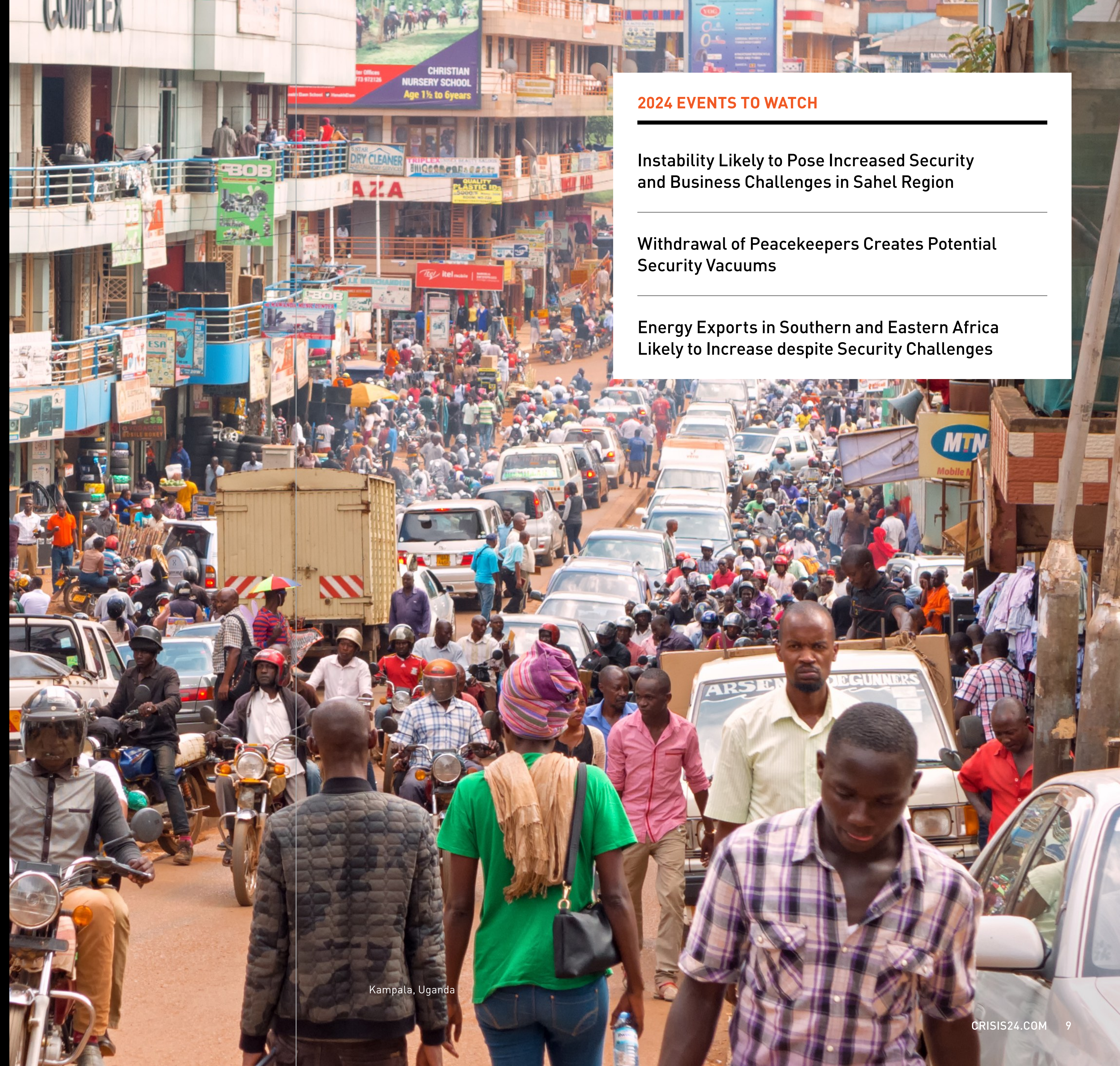
# REGIONAL OUTLOOK

# SUB-SAHARAN AFRICA

## Regional Outlook

Insecurity in Africa will continue to be a concern in 2024, but energy exports will also increase. Military and transitional governments in several West African countries will directly impact the region's security environment. Furthermore, the withdrawal of peacekeeping forces in high-risk countries will worsen the security situation in numerous parts of Africa. Despite the challenging security environment, energy exports and investments in the energy sector will rise in the coming year.




Kampala, Uganda

### 2024 EVENTS TO WATCH

**Instability Likely to Pose Increased Security and Business Challenges in Sahel Region**

**Withdrawal of Peacekeepers Creates Potential Security Vacuums**

**Energy Exports in Southern and Eastern Africa Likely to Increase despite Security Challenges**

# Instability Likely to Pose Increased Security and Business Challenges in Sahel Region

Regional insecurity across the Sahel will almost certainly continue to increase in the coming year due to an upsurge in activity by militant and local armed groups. The heightened security posture of regional militaries may pose a significant challenge to government stability. The recent military takeovers in Burkina Faso, Mali, and Niger have contributed to worsening governance in the region. New leaders must not only address current security issues but also contend with international pressure and maintain domestic support. This division of attention within the government can divert resources away from addressing militant threats effectively. Unchecked militant activity will likely contribute to a serious long-term threat to the region. Mali poses an especially elevated threat due to an armed separatist conflict in the north. The withdrawal of traditional partners may complicate an already challenging security and business environment in the Sahel.

## KEY JUDGMENTS

- → Military and transitional governments, particularly in the Sahel, increase the risk of instability in the region and create new challenges to the business environment as traditional alliances break apart.
- → Militant groups will attempt to take advantage of security gaps created by changing alliances and government security capabilities.
- → Public support for military and transitional governments may decline if they fail to improve security and economic conditions, likely increasing the risk of extended sanctions, civil unrest, and possible future coups.

The recent creation of the regional Alliance of Sahel States, composed of Burkina Faso, Mali, and Niger, will likely have a greater emphasis in the coming year as the alliance is certain to replace traditional partners such as the Group of Five for the Sahel (G5 Sahel) and UN peacekeepers. It emphasizes a collective security regime in which an attack on one is an attack on the others and is likely an attempt to reduce external pressure to transition back to civilian rule. The alliance may further complicate traditional security and diplomatic partnerships with the US, EU, and France. Questions remain on the effectiveness of its relationship with the Economic Community of West African States (ECOWAS)—whose counterterrorism strategy achieved arguably meager success in recent years largely due to divergent political divisions and initiatives. The increased isolation of the alliance will likely further entrench these military regimes, delaying the prospect of democratic elections, and develop non-traditional security partnerships such as the Russian-backed Wagner PMC (Private Military Company) group in Mali. Moreover, the civil-military identity crisis in the Sahel demonstrated by recurrent military coups coupled with a continued threat from militant attacks will likely further increase government censorship, restrict press freedoms, raise concerns over human rights allegations, limit civil society participation, and create adverse business and regulatory environments, among other challenges.

While the US, EU, and ECOWAS bloc imposed various sanctions on states undergoing a military transition in the Sahel, the increased isolation by traditional partners may have grave domestic implications for state budgets,





particularly in the long term. Following the July 26 coup in Niger, authorities in Niamey slashed government spending by 40 percent due to sanctions. Depleted state budgets may lead to decreased expenditures for social programs, state-led development projects, and the civil service, potentially leading to negative public sentiment towards the ruling junta. Areas within the Sahel already experiencing severe insecurity and poor economic development could potentially provide militant groups with more recruits. Government instability could jeopardize the operations of multinational corporations and diplomatic relations.

The Sahel suffers from both insecurity and instability from evolving external security guarantors, such as PMCs, and new domestic policies under military-led governments. Government instability will also likely contribute to a worsening security situation as national militaries and other security forces grapple with counterterrorism efforts; militant groups linked to Al-Qaeda and Islamic State have previously exploited this vulnerability, raising concerns for the wider region. Fractures and decreased cooperation between regional partners provide additional security gaps for militant groups to utilize.

## CONCLUSION

**Challenging business climates will likely persist in the medium-to-long term. While recent military coups in Africa have presented pressing security concerns, depleted resources due to ongoing international sanctions could potentially create new diplomatic fractures within the Sahel Region, resulting in significant challenges to multinational businesses, humanitarian aid organizations, and travelers. Without an increase in development by international aid partners and state-led initiatives, any security-led solutions aimed at tackling militant insecurity will likely falter like previously failed attempts. Significant increases in militancy over the previous decade were used as a justification for coups in the Sahel, and will likely be used again in the future. Governments weakened by militant activity, sanctions, or foreign influence, along with rising domestic concerns, are more vulnerable to military takeovers.**

# Withdrawal of Peacekeepers Creates Potential Security Vacuums

The withdrawal of peacekeeping operations from across the continent increases the risk of security vacuums in already high-risk areas, including the Democratic Republic of Congo (DRC), Somalia, and Mali, within the next year. Armed groups will almost certainly attempt to take advantage of the reduced security capabilities, making civilians increasingly vulnerable to criminal activity, terrorism, and human rights abuses. Government stability may also be threatened as peacekeepers are no longer able to assist in maintaining order if significant unrest breaks out. An escalation of violence may create new humanitarian disasters, including internal and external displacement.

A growing trend of peacekeeping operations withdrawing across the region also compounds security concerns. While the UN Security Council (UNSC) maintains a firm commitment to international peace and security, operations in the DRC, Somalia, Mali are beginning to draw down. The move will likely have multifaceted consequences, including the emergence of a security vacuum, rekindling of conflicts, political instability, and humanitarian crises.

The UN Organization Stabilization Mission in the DRC (MONUSCO) is in transition. The decision was sparked by a series of anti-MONUSCO demonstrations in July 2022, leading to a call from Kinshasa to reassess the mission's transition strategy, aiming to accelerate its downsizing and departure beginning in December 2023. In other instances, such as Somalia, the decision to dissolve the African Union's Transition Mission in Somalia (ATMIS) by 2024 faces a challenge due to financial constraints.

## KEY JUDGMENTS

- UN peacekeeping forces are scheduled to withdraw from high-risk countries including the Democratic Republic of Congo (DRC), Somalia, and Mali within the next year.
- Armed groups will almost certainly attempt to exploit security vacuums left by peacekeeping forces, increasing the risk of violence spreading in the region.
- A rise in violence and civil unrest threatens government stability, as well as creating potential humanitarian crises.

However, the Federal Government of Somalia (FGS) still lacks the capacity and capability to manage the security sector independently.

Simultaneously, in Mali, the UNSC approved the complete withdrawal of the UN Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) by early January 2024, following a request from the Malian government. The impetus behind this demand was the prevailing perception that the mission had fallen short of its objectives in bringing about peace since its initial deployment in 2013. MINUSMA's withdrawal, initiated in July, has been accompanied by a surge in militant attacks, including attempts to seize control of key towns, such as Timbuktu.

The most immediate and profound concern with the withdrawal of UN peacekeepers is a security vacuum. The absence of international peacekeepers will trigger a series of critical issues, notably, a risk of the resurgence of conflict as armed groups may exploit the lack of security to reassert control of territories, jeopardizing


the relative peace and stability. Civilian populations will be increasingly vulnerable to a range of threats, including terrorism, criminal activities, and human rights violations. The void left after peacekeepers depart can also destabilize host countries, making it difficult for governments to uphold law and order. This instability may catalyze power struggles and foment political unrest, further undermining the overall stability of these nations.

Withdrawing UN peacekeepers also has the latent capacity to cause abrupt political instability. While peacekeepers often reinforce the legitimacy of governments, their departure heightens the risk of coup attempts and power struggles. The gap left by UN forces may exacerbate preexisting political tensions and disputes within these host countries, escalating into political conflicts that, in turn, impede political stability.

## CONCLUSION

**The humanitarian implications of peacekeeping force withdrawal are profound. The escalation of violence following the departure could lead to the displacement of civilians, both within the borders of the affected nation and externally. This displacement can culminate in a full-blown humanitarian crisis, further exposing vulnerable communities. Additionally, the restricted access of humanitarian organizations to areas marked by heightened insecurity is a significant concern. This limited access hampers the ability of these organizations to provide essential aid, worsening the plight of local populations.**

# Energy Exports in Southern and Eastern Africa Likely to Increase despite Security Challenges

Energy exports and investments are rising in southern and eastern Africa despite a challenging security environment. The region could experience significant investment as the international community looks for more reliable energy partners and access to key minerals for renewable energy. Despite the new investments, the region still suffers from high levels of crime and civil unrest, insurgencies, civil wars, and shortages of food and electricity. Businesses operating in the region will need mitigation strategies to counter these operating risks.

## KEY JUDGMENTS

- Sub-Saharan Africa holds as much as 40 percent of the world's critical minerals needed for renewable energies, along with extensive oil and natural gas reserves, making it an attractive region for investment.
- Despite the ongoing investment in southern and eastern Africa's energy sectors, significant security challenges remain in the region.
- Businesses operating in the region will need extensive risk mitigation strategies to contend with high levels of crime and civil unrest, insurgencies, food and electricity shortages, and potential political upheaval.


Angola

Despite experiencing extreme levels of insecurity due to civil wars, religious insurgencies, or high levels of crime, southern and eastern Africa are regaining the interest of global partners, particularly in the energy industry. The region has seen significant security improvements, fostering renewed trust in international partners. Added to this, the war in Ukraine has emphasized Sub-Saharan Africa as a global energy partner, both due to the necessity of alternatives and because of the growing understanding of the risks.

Energy exports of petrol, natural gas, and uranium, key to both fossil fuels and renewable energies, and investments are increasing in Sub-Saharan Africa. The search for alternative sources of energy or diversification of energy providers is also on the rise in the region. Africa could hold as much as 40 percent of the planet's cobalt, manganese, and platinum, critical ore for the development of renewable energies. The unpredictability of relations with Russia is likely to continue into 2024, and the region could submit itself as an alternative long-lasting energy partner. This could translate into a new surge in investment directed towards Africa's still nascent energy sector, with up to USD 100 billion reportedly ready to be invested. Operating in Africa appears increasingly attractive—if not necessary—to match current demands for oil and gas and prepare the transition to green energies. In Tanzania and Uganda, the East African Crude Oil Pipeline (EACOP) promises to be the longest electrically heated crude oil pipeline in the world, capable of transporting around 216,000 barrels per day. The construction of a liquified natural gas (LNG) facility in Mozambique could produce up to 6.6 billion cubic feet of natural gas per day.

Despite the potential growth in investment, the region is not immune to the security challenges recently experienced in the Sahel. African energy exports have, and will likely continue to face, domestic and international resistance, and risks of violence or change in governments. Environmental concerns linked either to the extraction or transport of hazardous resources have a high risk of drawing public opposition. While resources, especially minerals, are required to sustain the global green energy transition, the continued extraction of fossil fuels remains vulnerable to civil unrest.

In northern Mozambique, the discovery of rare minerals and gas reserves in the 2000s led to an initial investment boom. The country could hold up to 100 trillion cubic feet of natural gas, amounting to about 15 percent of the continent's reserves and making it the third-largest natural gas reserves behind Nigeria and Algeria. However, developments were put on hold when an Islamist insurgency in Cabo Delgado Province began in 2017, peaking during an attack on the Palm deep seaport in 2021. Despite the threats, Mozambique exported its first LNG shipment out of Cabo Delgado in November 2022, and the previously halted construction project is scheduled to resume imminently.

However, the resumption of operations is not due to a significant improvement in the security situation. As of late 2023, the militant threat to operations remains elevated: militants regularly target security forces, villages, and occasionally mining compounds, indicating that attacks on coastal infrastructure remain possible. The improvement could be attributable to the assistance of foreign security forces provided by the Southern Africa Development Community (SADC) and Rwanda, as well as a better understanding of the security situation. New contingency plans include private-public partnerships for security extending beyond the areas of development and closer relationships with the local communities rather than with the central governments alone.

The socioeconomic impact of foreign investments in developing nations can cause or enhance preexisting conditions, especially in regimes with high rates of corruption or weak states vulnerable to criminal syndicates or regime changes. Foreign investment in developing countries can be perceived as preventing or not contributing to local economic growth. This perceived "resource curse," where despite abundant natural resources, the local population remains impoverished and does not reap the economic benefits. Increased foreign investment and the presence of foreign nationals will also increase the potential for crime, including kidnappings, piracy, and terrorist attacks targeting foreign nationals.

AFRICA COULD HOLD AS MUCH AS **40 PERCENT** OF THE PLANET'S COBALT, MANGANESE, AND PLATINUM, CRITICAL ORE FOR THE DEVELOPMENT OF RENEWABLE ENERGIES.

Finally, energy exports could prove increasingly unpopular as Africa's energy shortages are likely contributors to some development struggles. African countries have not been spared the economic impact of resource—food, oil, and coal—shortages caused by increased demand and prices of essential goods. Fuel shortages in Malawi and Zambia and rolling power cuts in South Africa, Madagascar, Zimbabwe, and Malawi are examples of the impact. With national elections planned over the coming year in many countries across the continent, policy changes are possible.

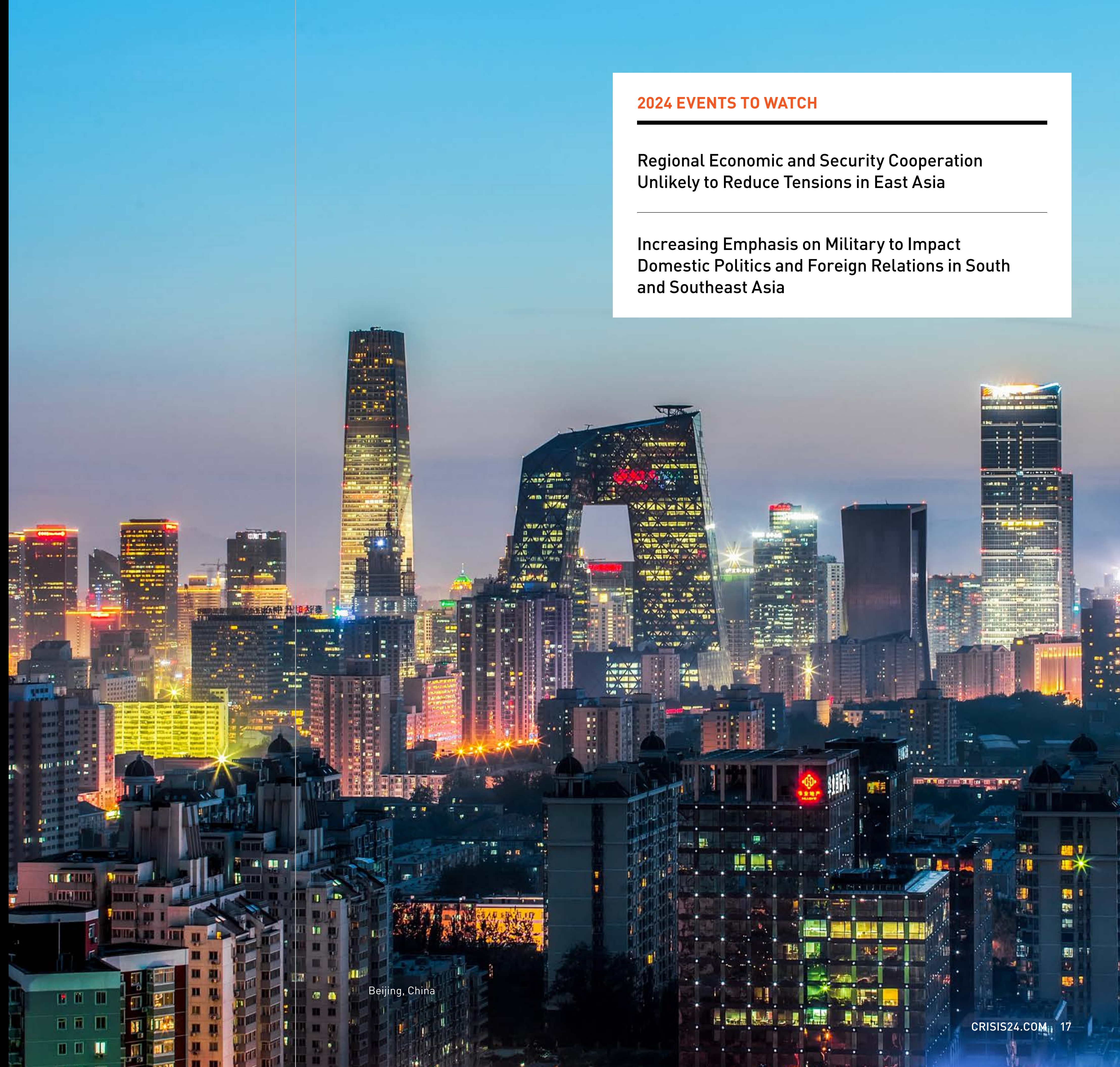
## CONCLUSION

**Investments in southern and eastern Africa are likely to continue over the coming year despite the current security challenges. Operating in Africa will require self-reliance; being able to generate electricity, clean water, and essential services independently from national grids and infrastructure to ensure security independently from often ill-prepared public security services is necessary. However, remaining cognizant of the social impact of large-scale industrial operations and ensuring local populations also reap the benefits of the exploitation of natural resources will reduce the risk of public opposition.**

# ASIA-PACIFIC

## Regional Outlook

In the coming year, the geopolitical environment across Asia-Pacific will continue to be characterized by regional polarization. In East Asia, countries will increasingly divide into US- and Chinese-aligned blocs as Beijing and Washington act to contain each other's influence, with Taiwan acting as a possible magnet for tensions. Smaller states across the region will find it difficult to navigate a purely neutral course. Destabilizing factors in South and Southeast Asia will also provide avenues for the military to exert significant influence over domestic politics in several countries.



Beijing, China

### 2024 EVENTS TO WATCH

**Regional Economic and Security Cooperation Unlikely to Reduce Tensions in East Asia**

**Increasing Emphasis on Military to Impact Domestic Politics and Foreign Relations in South and Southeast Asia**

# Regional Economic and Security Cooperation Unlikely to Reduce Tensions in East Asia

In the coming year, regional economic and security cooperation is unlikely to alleviate existing tensions in East Asia. The region will probably experience increased polarization along China-US lines due to three major trends. These include the emergence of competing spheres of cooperation in East Asia, the intensification of containment policies by Beijing and Washington, and increasing volatility in the security situation across the Taiwan Strait.

## KEY JUDGMENTS

- → The medium-term expansion of relationships between China and North Korea on the one side and Japan and South Korea on the other will have a detrimental effect on regional security.
- → Expanded national security laws in China will heighten distrust and exacerbate the risk of detention of foreigners, including those from the US and aligned countries such as Japan and South Korea.
- → Beijing will likely continue to increase pressure on Taiwan after the January 2024 Taiwanese presidential elections, though imminent military conflict remains improbable.

## SECURITY-BASED POLARIZATION

The budding anti-Western military alliance between China, North Korea, and Russia has prompted tighter security cooperation between the US, South Korea, and Japan, and reduced the opportunities for smaller Southeast Asian states to tread a neutral line. In the second half of 2023, bilateral relations between China and Russia, as well as between Russia and North Korea, reached a new peak; leaders from the three states have also expressed interest in trilateral military cooperation in the future. On July 20, Russian anti-submarine ships and fighter jets joined China's People's Liberation Army (PLA) for exercises in the Sea of Japan; PLA fighter jets also took off from a Russian airfield for the first time as part of the exercise. The exercises were intended as a realistic simulation of joint operations against US and Japanese forces. Satellite imagery has also shown railroad traffic from North Korea to Russia is at its highest level in at least four years. North Korea has delivered at least 1,000 containers of military equipment to Russia, likely in exchange for food aid and energy sector cooperation, as well as satellite and missile technology transfers. In the upcoming months, Beijing will probably strengthen its own relationship with Pyongyang to counterbalance the recent warming of ties between Kim and Putin.

Conversely, following Russia's invasion of Ukraine in 2022, as well as widely shared perceptions of increasingly aggressive posturing by China, Western states have also strengthened their positions in Asia-Pacific. The AUKUS initiative and trilateral cooperation between the US, South Korea, and Japan are prime examples of the strengthening of the US presence in the region. AUKUS was established in 2021 as a strategic partnership between Australia, the UK, and the US to bolster their combined deterrence and defense capabilities in the Indo-Pacific. The partnership allows for Australia's acquisition of conventionally armed, nuclear-powered submarines, as well as collaboration on advanced capabilities. Tokyo and Seoul have also set aside longstanding grievances to enter a US-led collaborative partnership. Notable cooperation initiatives include a joint aerial exercise held near the Korean peninsula, and the introduction of a three-way communication hotline to be used during security crises.



NORTH KOREA HAS DELIVERED AT LEAST **1,000 CONTAINERS** OF MILITARY EQUIPMENT TO RUSSIA.

Pyongyang, North Korea

The unprecedented, provisional cooperation pacts between the three staunchly anti-Western states will likely be temporary; the meetings between Kim and Putin have yet to generate any long-term military transfer agreements, and Russia's war of attrition in Ukraine will reduce Moscow's ability to significantly support China. On the other hand, the US, South Korea, and Australia are all slated for elections in 2024, and the strength and durability of their newly formed alliance would depend partly on their newly elected leaders' inclinations towards cooperation. Nevertheless, given that current arrangements represent major efforts to establish precedent and create momentum intended to transcend domestic political changes, security cooperation among these democracies will almost certainly remain stable through 2024, barring any sudden triggers such as a deterioration of the fragile Japan-South Korea relationship.

## CHALLENGES LIKELY AS REGION BALANCES RELATIONS WITH RIVAL BLOCS

This increasing polarization will likely complicate the geopolitical considerations of Southeast Asia, where states would have to shift away from their traditional foreign policy principle of maintaining close economic ties with China, while ensuring military compatibility with the US. It could become increasingly challenging for smaller states to enter into the type of new trade agreements with China, upon which most depend heavily, without facing pressure to distance themselves from the US.

The economic and security policies of both the US and China, driven in part by domestic factors, are likely to worsen people-to-people relations and transnational business cooperation. In October 2023, as part of increased efforts to protect what they perceive as core technologies crucial to national security, the US further imposed chip export restrictions. The restrictions aimed at preventing Nvidia, the world's most valuable chipmaker, from shipping two of its most advanced AI chips to Chinese customers. Additionally, to avoid resales to China, the US also implemented additional licensing requirements for shipments to over 40 countries. Similarly, China implemented a series of laws aimed at tightening control over foreign nationals and businesses within its borders. Notable policies include stronger data transfer laws to prevent both the inflow and outflow of information across China, and additions to the anti-espionage laws that encourage Chinese citizens to actively report potential espionage activities. Fundamentally, these policies reflect the adoption of mutual containment strategies by the US and China. Domestic factors such as the 2024 US presidential election, and China's sluggish economic recovery also play crucial roles in the heightened rhetoric and policy against the other.

In the future, such policies will heighten distrust. In 2023, there was an increase in detentions and exit bans affecting foreign executives in China on charges of alleged espionage. A rising culture of scepticism and hostility surrounding foreigners will likely hasten efforts by the US and its allies to onshore and diversify supply chains.

The Kishida government has persuaded global chip maker Taiwan Semiconductor Manufacturing Co. to build a new plant in Kyushu, while Japanese firms have reduced their investments in China, instead turning to India and North America. South Korean giants including Samsung Electronics have also significantly increased investment in Vietnam, to serve as an alternative production hub.

### TAIWAN TO CONTINUE TO FACE PRESSURE

Heightened military aggression by the PLA is possible around Taiwan's January 2024 presidential election. Nevertheless, Western states' support of Ukraine against Russia, and the PLA's failure to achieve military parity with the US, mean a full-scale military conflict across the Taiwan Strait is unlikely in 2024. The current frontrunner for the presidency, Democratic Progressive Party (DPP) candidate Lai Ching-te, considers Taiwan a sovereign, independent country, maintaining that there is no need for a formal declaration on independence. With a likely DPP win in January 2024, Taiwan will almost certainly continue nurturing its relationship with the US, one that has become most amiable under current DPP President Tsai Ing-wen; strong Taiwanese resolve against China's military aggression will also probably remain a key foreign policy under Lai's leadership. Pertaining to the PLA's strength, the October 2023 *China Military Power Report* by the US Department of Defense notes that China has made significant advances in key military capabilities, such as the development of intercontinental ballistic missiles that might allow it to threaten strikes against targets in the continental US. Under these circumstances, China is likely to continue intimidation tactics, including normalizing further incursions by PLA aircraft into Taiwan's air defense identification zone or pressurizing the island's regional allies. In 2024, the inclusion of civilian vessels as part of larger military efforts to prepare for a blockade of Taiwan is also possible, given that four of China's 31 roll-on/roll-off (RORO) ferries started sailing operations around Taiwan's Kinmen Island in September 2023.

THE CURRENT FRONTRUNNER FOR THE PRESIDENCY, DEMOCRATIC PROGRESSIVE PARTY (DPP) CANDIDATE LAI CHING-TE, **CONSIDERS TAIWAN A SOVEREIGN, INDEPENDENT COUNTRY,** MAINTAINING THAT THERE IS NO NEED FOR A FORMAL DECLARATION ON INDEPENDENCE.

### CONCLUSION

**Nevertheless, while this may demonstrate continued preparations for China to forcibly seize Taiwan, a war is unlikely in 2024 despite the increasingly stark regional division between competing spheres of cooperation and interests. First, the West's strong response to the Ukraine conflict and the US' repeated emphasis on its resolve to defend allies against Chinese aggression, may deter Beijing for the time being. Secondly, the PLA, while stronger, has yet to achieve military parity with the US and its allies. The PLA's nuclear warhead arsenal (<500) still pales in comparison to that of the US (5,244); on the naval front, it is likely that the People's Liberation Army Navy (PLAN) has yet to achieve the capability to completely blockade Taiwan, which military experts have estimated would require at least four aircraft carriers (the PLAN is not expected to commission its third aircraft carrier until later in 2024). Furthermore, Western firms and governments will remain reliant on Chinese inputs and suppliers in the medium term despite diversification plans due to the scale of Chinese involvement in the global supply chain. Hence, the US and its allies are vulnerable to Chinese economic coercion in the event of a significant deterioration in the regional security environment.**



# Increasing Emphasis on Military to Impact Domestic Politics and Foreign Relations in South and Southeast Asia

Increased geopolitical polarization and insecurity stemming from the aftermath of the COVID-19 pandemic and impacts of the Ukraine conflict will influence policies in South and Southeast Asia through 2024. While some countries will see continued military influence in governance, others will expand the powers of their armed forces through controversial laws that may repress domestic opposition. Smaller nations in strategically important locations will also face challenges in balancing military and economic cooperation with global and regional hegemons.

Myanmar soldier.

### MILITARIES AND POLITICAL POWER

Although the military—the de-facto government of Myanmar since the 2021 coup—claims twice-postponed elections will occur after a national census in October 2024, further delays are likely. If elections do proceed, the junta will almost certainly maneuver to retain power. Military officials have changed the country's electoral system to proportional representation, which will effectively prevent any single party from dominating the government. A public boycott of elections citing unfairness is also possible as the junta has restricted election participation by disqualifying more than 40 political parties, as well as detaining many political leaders and activists. Despite near-total diplomatic isolation and international sanctions targeting junta leaders, most countries in the region are maintaining varying levels of contact and economic cooperation with Myanmar. Regional organizations like the Association of Southeast Asian Nations (ASEAN), of which Myanmar is a member, remain incapable of significant punitive measures or diplomatic

## KEY JUDGMENTS

- The military will remain in power, or retain a dominant political role domestically, in multiple countries, including Myanmar, Thailand, and Pakistan.
- Military cooperation is emerging as a new frontier of great power competition, especially in island nations in the Pacific and Indian oceans, heightening polarization based on security alliances.
- Expansion of national security laws and military powers in countries like Cambodia and Indonesia may contribute to an increase in internal repression of democratic values.

influence to prompt a revival of democratic processes. Hence the status quo is likely to continue in the medium term.

In Thailand, the military has also shown no intention to step away from politics, sustaining a potential source of instability. An improbable alliance of three key political forces—pro-democracy groups, including supporters of former Prime Minister Thaksin Shinawatra dubbed the Red Shirts, the military, and the monarchy—has risen to dominance. The Pheu Thai Party (PTP) is currently in power with the backing of a military-appointed senate, after it formed a post-poll alliance with pro-military and royalist parties. PTP's Thaksin Shinawatra was also granted royal pardon by King Maha Vajiralongkorn shortly after a return from his 15-year exile.

The latest moves indicate the ruling coalition could limit or suppress ongoing movements demanding limits to the monarchy's authority, including the rollback of lese-majesty laws that criminalize criticizing the royal family, as well as constitutional reforms to prevent coups and abolish conscription. Political uncertainty is likely to remain elevated due to inherent frictions within the fragile coalition, potential legal challenges and no-confidence motions by opposition parties, as well as difficulties in balancing populist demands with limitations by the monarchy and armed forces. Significant violence that materializes during any renewed protests may, in turn, trigger a crackdown and potentially provide grounds for at least a temporary power grab by the military.

Elsewhere, in Pakistan the military has gained an upper hand after an unprecedented controversy, with Pakistan Tehrik-e-Insaf (PTI) leader Imran Khan directly accusing the erstwhile army chief of staff of sabotaging his prime ministerial tenure and masterminding a later gun attack on him. PTI activists also attacked military installations following Khan's detention in May, attracting charges under anti-terror laws with trials in military courts. Khan, who faces more than 100 lawsuits, is currently imprisoned on corruption charges and barred from politics through at least 2028. In addition, the parliament amended the Official Secrets Act to expand the powers of military intelligence agencies, with controversial clauses such as a vague definition of "enemy" as any entity suspected of acting in prejudice of the nation's safety, as well as powers to forcibly search premises without warrants. The PTI is certain to intensify confrontations with the military establishment in the lead up to general elections in early 2024, both to win public support for the party as well as to address the persistent challenge the army poses to civilian governments. Although a military takeover of the government is highly unlikely, serving and retired army officials are almost certain to play a key role in political negotiations in case of a hung verdict in the general elections. The important function of the military in both controlling significant violence during any political protests and heading counterterrorist operations as the nation faces historically high rates of terrorist incidents will also entrench the oversized hold of the armed forces in any civilian government that is formed.

Governments with close links between political and military leaderships have continued to enforce laws to limit dissent, including the proposed National Internet Gateway in Cambodia which will mandate internet traffic through a state-controlled portal, as well as the planned Online Safety Bill in Sri Lanka that will award powers to police and state-appointed private investigators to regulate online communication. There are also growing concerns in other countries over the expansion of militaries' powers due to actual or perceived threats to national security. For instance, the Indonesian military has proposed at least 15 changes to the law governing its role and function. These include establishing regional army commands, allowing active-duty officers to hold more civilian posts, reducing presidential powers over the armed forces, and increasing the scope of duties to support local governments, policing, disaster management, counterterrorism, as well as border and maritime security. Human rights groups have condemned measures aimed at monitoring or controlling activities deemed detrimental to national interests, or expanding military influence into traditionally civilian domains like law and order, as potentially repressive.

> IN THAILAND, THE MILITARY HAS ALSO SHOWN **NO INTENTION TO STEP AWAY FROM POLITICS,** SUSTAINING A POTENTIAL SOURCE OF INSTABILITY.

## MILITARY COOPERATION AND GREAT POWER COMPETITION

Countries along key maritime routes have increasingly found themselves at the center of US-China competition over access to strategic assets, navigation, energy resources, and fisheries.

Small island nations in the Pacific, including Fiji, Papua New Guinea, Solomon Islands, and Vanuatu are especially affected. The US has historically maintained strong ties with several of these countries, including military partnerships like the Compact of Free Association with the Federated States of Micronesia, the Republic of the Marshall Islands, and Palau. However, more recent proposals for security agreements by Australia—a close US ally—have met strong domestic opposition in countries like Papua New Guinea and Vanuatu, amid Chinese efforts to increase its regional maritime presence and build diplomatic ties as a counterbalance to US influence.

Beijing has financed Belt and Road Initiative (BRI) projects in many of these nations and has sought to progressively displace Western security partners. For example, China has signed a security pact and additional police agreements with Solomon Islands in recent years, paving the way for Chinese police presence in the territory. Chinese naval vessels have also made port calls in several Pacific island nations, including Fiji, Vanuatu, and Tonga. Nonetheless, critics and opposition parties have raised concerns about debt dependence, lack of transparency in disclosing bilateral pact details, and potential foreign influence in political decision-making. Corruption allegations and political differences are likely to mar foreign policy decision-making and contribute to regulatory uncertainty for businesses.

A lack of strong regional institutions for confidence-building mechanisms will also worsen India-China competition for influence in the Indian Ocean region. China is the only major power with embassies in all littorals along the Indian Ocean, on top of growing investments in infrastructural and energy projects. Beijing has also attempted to shape the regulatory and political environment in countries like Nepal through inter-party and think tank engagements, as well as expanded military cooperation by holding its first ever joint military exercise with Nepal, and continuing equipment transfer, including submarines, to Bangladesh.

Additionally, tensions are unlikely to wane in the South China Sea. The Philippines, in particular, will continue to focus on expanding its military power to challenge Chinese presence and expansion in disputed areas. Philippines-US military relations continue to grow in strength through a mutual defense treaty and the inclusion of new bases under the Enhanced Defense Cooperation Agreement. Other claimant states may also increase patrols of disputed areas, heightening the risk of miscalculations. Limited small-scale military standoffs, which could disrupt commercial sea-lanes in the East China Sea, as well as the Lombok, Malacca, and Sunda Lombok straits, cannot be ruled out in the next year.

## CONCLUSION

**Geopolitical uncertainty, institutional corruption, and weak regional cooperation are likely to continue to foster the increasing importance of military strength across South and Southeast Asia in the medium term. The trend will shape domestic policymaking, democratic values, and global alliances that hold operational significance in the coming years.**

# MIDDLE EAST AND NORTH AFRICA (MENA)

## Regional Outlook

Hamas' Oct. 7 attack will radically and irrevocably alter the Middle East and North Africa (MENA) region. The attack is unlike any prior escalation, and its consequences will continue to impact development in the region for years to come. The surprise Hamas attack against Israel completely shattered the status quo in the region. In response, Israeli Prime Minister Benjamin Netanyahu vowed to "demolish Hamas," and the recent escalation in the Israel-Hamas conflict will likely shape the response of all regional actors. The number of civilian casualties in Gaza has led to global unrest and disruptive protests, which will likely shape the policy positions of regional leaders. The uncertainty surrounding a wider regional conflict will have significant impacts, both in the region and around the world.

**2024 EVENT TO WATCH**

**Israel-Hamas Conflict to Redefine Geopolitical Status Quo in the MENA Region**

Israel and West Bank security wall.

# Israel-Hamas Conflict to Redefine Geopolitical Status Quo in the MENA Region

## KEY JUDGMENTS

- Regional and global players will likely continue to apply geopolitical pressure to avoid the spread of the conflict.
- Iran will continue to utilize its proxies within the geopolitical theater known as the "grey zone."
- The escalation of the Israel-Hamas war will exacerbate existing political, economic, and social issues in North Africa.

## "AXIS OF RESISTANCE" AND THE POTENTIAL REGIONALIZATION OF THE CONFLICT

Many regional actors have expressed concerns and issued threats following the Israeli offensive against Hamas, suggesting a potential regionalization of the conflict in the medium-to-long term. On Oct. 19, Iran's Supreme Leader Ayatollah Ali Khamenei stated that "the forces of resistance," including Hizballah in Lebanon, the Al-Houthi rebels in Yemen, and Shi'a militias in Iraq and Syria, would be able to attack Israel from multiple fronts. Iran's proxies are vital for Tehran's foreign policy, as they provide plausible deniability for attacks, often used against rivals during periods of heightened regional tensions.

While Hizballah has limited its involvement in the current Israel-Hamas conflict, launching rockets into northern Israel with a relatively contained impact, the militant group is increasingly calling for protests and defining strong red lines. Should Israel occupy Gaza in the long term, Hizballah could become more directly involved. The opening of a new military front in northern Israel with Hizballah will remain a concern throughout 2024 as it would stretch Israel's military capabilities. Hizballah's military resources vastly surpass Hamas' as it is the world's most heavily armed non-state actor, especially with regard to missiles and rockets. According to the Israel Defense Forces (IDF), Hizballah could possess over 150,000 rockets and missiles. Their increasingly advanced arsenal of projectiles, some of which have a range up to 550 km (340 miles), would cause severe damage within Israel.

Yemen's Al-Houthis confirmed their involvement in multiple missile and drone attacks targeting southern Israel in late October. Their attacks are likely to periodically continue so long as the conflict is ongoing. Their participation in the ongoing conflict with Israel represents, for now, a harassment campaign, though the rebel group has previously demonstrated that it has the means and capabilities to cause damage to long-range targets, notably by attacking deep into Saudi Arabia and the United Arab Emirates (UAE). Their support of the Hamas attack confirms that they are firmly committed to the Iran-led axis of resistance. They will likely continue to attack Israel in the medium-to-long term, especially during periods of heightened geopolitical tension. In the long term, the involvement of the Al-Houthis in the Israel-Hamas conflict could also jeopardize the fragile geopolitical status quo in the Gulf and threaten the de-facto ceasefire in Yemen.

Iran's other proxy forces, including in Iraq and Syria, have also responded to the Israel-Hamas war by stepping up their attacks against US interests in the region. Over the course of the first three weeks of the conflict, Iran-backed proxies launched over 50 attacks targeting military bases hosting US and coalition forces in Iraq and Syria. The proxies are also targeting Israel: on Nov. 2, the Iran-backed Islamic Resistance in Iraq (IRI) claimed to have targeted a site along the coast of Israel's side of the Dead Sea. In addition to those attacks, proxy forces in Iraq continue to issue threats against US bases in other countries in the Persian Gulf, specifically in Kuwait and the UAE. An attack against a US base in the Gulf remains unlikely; however, Iran-backed proxies have previously targeted critical oil and gas infrastructure in Saudi Arabia and the UAE.

## REGIONAL CONCERNS INCREASE DIPLOMATIC EFFORTS TO PREVENT THE SPREAD OF THE CONFLICT

Arab states surrounding Israel, such as Egypt and Jordan, are increasingly concerned that the current humanitarian crisis in Gaza will lead to a refugee crisis in their own territory. Jordan is already hosting more than 2.3 million Palestinian refugees, while Egypt continues to fight an Islamist insurgency in the Sinai Peninsula. Egyptian President Abdel Fatah el-Sisi has warned that an influx of refugees from the Rafah crossing could feed militancy in the region. Arab leaders cannot afford to remain inactive in this crisis. Related unrest has already occurred in Amman, Beirut, Baghdad, and Cairo. The events of the Arab Spring remain a concern for Arab leaders, and they know they must be mindful of the anger emanating from their streets. Therefore, an escalation in the Israel-Hamas conflict that leads to a surge in Palestinian casualties may catalyze further unrest in Arab countries in the months ahead, forcing a strong political response from Israel's neighbors.

Other regional stakeholders, in particular Doha, Riyadh, and, by extension, the Arab League, have called for a de-escalation of the conflict. Of all the Gulf monarchies, Qatar is the most involved in the conflict due to its status as one of the Middle East's preeminent mediators. Qatar has leveraged its financial and political relations with Hamas to establish diplomatic backchannels to mediate the release of hostages captured during the initial Oct. 7 attack. Doha's diplomatic clout also contributed to the Nov. 1 opening of Gaza's Rafah border crossing with Egypt, albeit on a limited basis, allowing foreign nationals, dual-passport holders, and some of the most seriously injured to pass. Moreover, Doha has hosted Hamas' senior leadership since 2012 and has provided significant funding to Gaza over the years. Doha will likely continue to leverage its relations with both Hamas and the West to mediate and prevent a full-scale regional war. However, the country's status as an impartial negotiator could be impacted in the long term should they continue to host Hamas' leadership in a post-conflict scenario.

IRAN-BACKED PROXIES **LAUNCHED OVER 50 ATTACKS** TARGETING MILITARY BASES HOSTING US AND COALITION FORCES IN IRAQ AND SYRIA.

## REGIONAL AND GLOBAL CONSEQUENCES OF CONFLICT REGIONALIZATION

Since Oct. 7, Hamas has called on its supporters worldwide to launch militant attacks. Consequently, most Western countries have increased their threat levels and security measures around sensitive sites, including religious sites, schools, and gathering places. If the conflict escalates, the risk of militant attacks will likely rise. Radicalized individuals are likely to be emboldened by Hamas and other Islamist militant groups' calls for violence. There has also been an uptick in antisemitic and Islamophobic acts. Hate crimes against both Jews and Muslims alike are likely to continue to rise around the world in the long term.

Pro-Palestinian protests are growing in size and frequency across the world and becoming more disruptive. Israel has already evacuated several of its embassies in the MENA region as protests increasingly target Western and Israeli interests. At the same time, Western governments have issued travel guidelines for their citizens in the region, particularly to limit travel to Jordan, Lebanon, and Egypt. Saudi Arabia, the US, and the UK have asked their citizens to depart Lebanon as soon as possible for fear of the conflict spreading into southern Lebanon.

In a worst-case scenario, the regionalization of the Israel-Hamas conflict could lead to the opening of a new, long-term, major war, though this appears unlikely in the short term. Western countries slowly recovering from the economic impacts of the COVID-19 pandemic will not likely have the will or the resources to support both Ukraine in its war against Russia and Israel if it gets engulfed in a regional war. Russian authorities and Arab leaders have already pointed out Western hypocrisy and double standards as European and US leaders are providing unrestrained support for Israel's offensive despite a high number of civilian casualties. This is creating a rift between Western countries and their Arab allies. Other international actors, like Russia and China, might seek the opportunity to deepen the divisions and become more involved in the region amid this dynamic in the coming months.

## LONG-TERM ECONOMIC IMPACTS OF THE ISRAEL-HAMAS CONFLICT

Global stakeholders are increasingly concerned about the economic consequences of the Israel-Hamas conflict. Since Oct. 7, Israel's leading technology industry abruptly slowed, and promising offshore natural gas fields have shut down. This is partly a result of the mobilization of reservists—mostly young professionals leaving jobs and businesses to answer the call to duty. Major airlines have suspended flights to and from Ben Gurion Airport, leading to significant air travel and supply chain disruptions. Credit rating agencies have warned that Israel's debt could be downgraded as investments crumble and the Israeli Shekel is in free fall. For the Palestinian Territories, the economic outlook was already bleak before the current crisis; now, Gaza's critical infrastructure has been ruined, and Israel's "total blockade" has led to shortages of food, water, gas, and other essential goods. The displacement of millions of Palestinians will lead to a humanitarian crisis that could last decades.

The domestic long-term economic impact will have regional and global effects. The head of the International Monetary Fund warned global investors meeting in Riyadh for the Future Investment Initiative that the conflict could deal a heavy blow to the global economy, especially if the conflict escalates into a regional one. Tourism-dependent countries are particularly vulnerable to global uncertainty and the increased threat of militant attacks. Investments and consumption will likely slow down globally, just as the global economy was on a path of relative recovery from the COVID-19 pandemic and the Ukraine war.

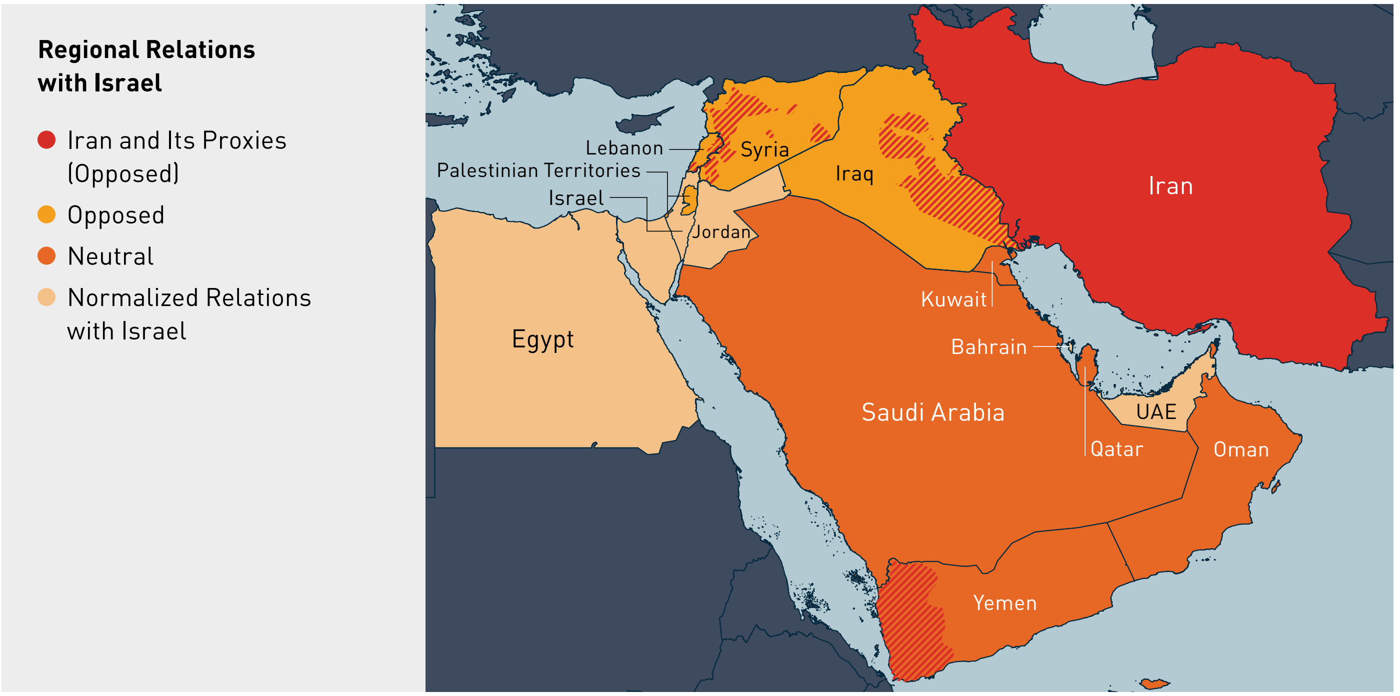
## GULF MONARCHIES: RESPONSE AND IMPACT

The Persian Gulf monarchies that comprise the Gulf Cooperation Council (GCC) have called for de-escalation between Israel and Hamas. There have been, however, notable differences between them as to the level of criticism directed toward Israel. While the Abraham Accords signatories, Bahrain and the UAE, have struck a more neutral tone, Saudi Arabia, Oman, Qatar, and Kuwait have voiced harsh criticism of Israel and its treatment of Palestinians.

Despite their varying diplomatic positions, all the GCC states have a shared interest in preventing the localized conflict from spreading into a regional one. None of the Gulf monarchies desire a return to the geopolitical competition and associated proxy conflicts that had characterized the region over the past decade. However, the Israel-Hamas war has exposed the Gulf monarchies once again to the specter of a broader regional conflict. Any potential expansion of the conflict to involve Iran and its proxies poses an immediate and long-term threat to the stability, security, and prosperity of the bloc's member states. In recent years, the GCC states have committed significant diplomatic efforts to de-escalate tensions between enemies in the region. Most prominently, they had been negotiating a ceasefire with Yemen's Al-Houthi rebels amid concerns of a return to the frequent missile and drone attacks that targeted, primarily, Saudi Arabia as well as the UAE. Prior to Hamas' attack, the Persian Gulf region appeared to be entering a new period of greater regional economic and diplomatic integration and cooperation. The belief that the post-2011 Arab Spring era—characterized by turbulence, geopolitical adventurism, and proxy conflict—was coming to an end has truly been shattered. The desire for stability within the GCC's neighborhood is genuine, albeit motivated by the need to foster an environment that supports economic growth, foreign investment, and diversification.

In the weeks and months leading up to Hamas' attack, Saudi Arabia appeared to be edging towards a landmark agreement to normalize diplomatic ties with Israel. The kingdom sought normalization due to the potential economic and security benefits it would gain. Hamas' attack has undoubtedly put any possible Saudi-Israeli rapprochement on hold for at least the short-to-medium-term. The attack also undermined Saudi Crown Prince Mohammed bin Salman's attempts to de-risk the region as he seeks to implement his ambitious cultural, economic,

SINCE OCT. 7, HAMAS HAS CALLED ON ITS SUPPORTERS WORLDWIDE TO **LAUNCH MILITANT ATTACKS.**



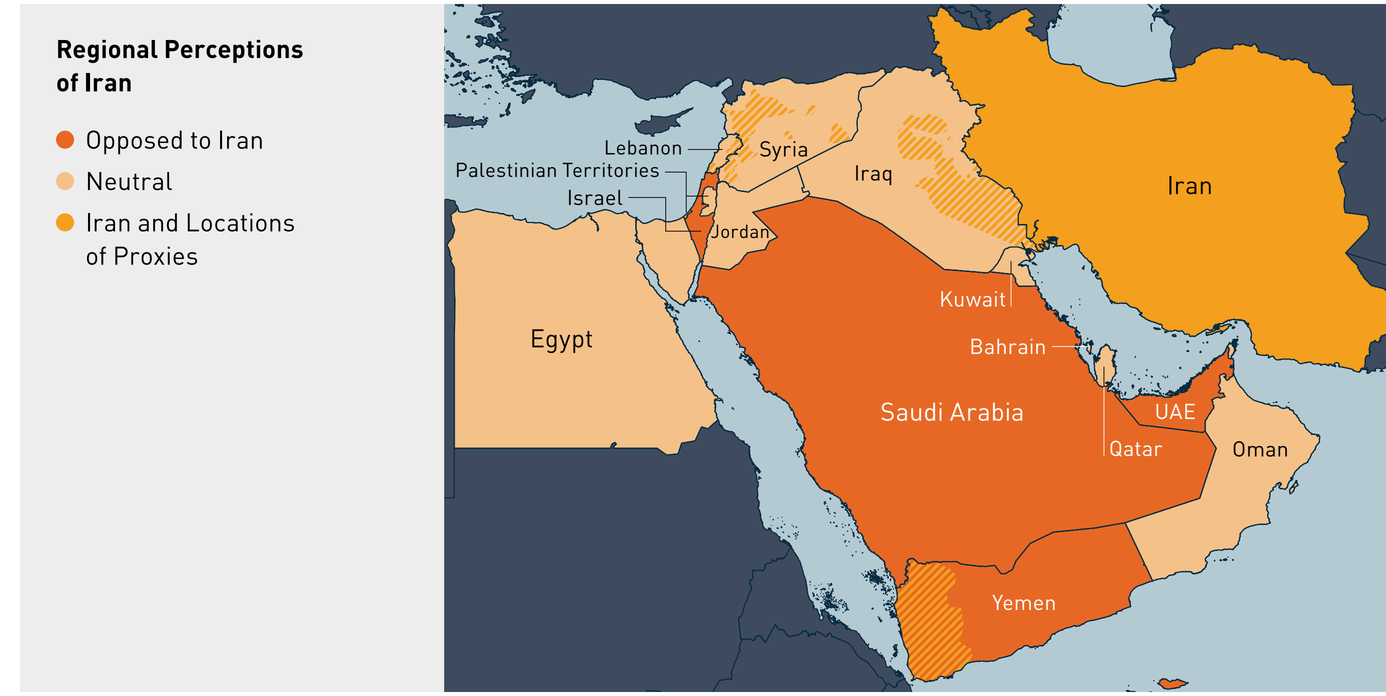

and social reform agenda known as Vision 2030. The kingdom, in addition to the other GCC states, hopes that greater economic development and prosperity will result in more regional cooperation and, by extension, more stability. Hamas' attack and the possibility of a wider regional conflagration will threaten that ideal in the initial months of 2024.

## NORTH AFRICA WILL FACE NEW CHALLENGES

While not directly involved in the Israel-Hamas conflict, North African countries will likely be impacted by the aftershocks of the conflict in 2024. Israel's offensive in Gaza is feeding the anger already boiling in the Arab street and will likely continue to jeopardize the region's economic stability in the medium term. As most governments have failed to ensure a steady economic recovery from both the COVID-19 pandemic and the Ukraine war, popular dissatisfaction and outright anger are polarizing societies in North Africa. Economic instability will feed political uncertainty as governments will almost certainly attempt to curb civil unrest and avoid widespread protests, increasing the risk of authoritarian entrenchment.

Civil unrest is spreading once again in the streets of North African countries. In Rabat, Moroccans rallied to demand the annulment of the 2020 normalization agreement with Israel. In Tobruk, the Libyan House of Representatives demanded the immediate departure of ambassadors whose governments appeared to support Israel, including the US, the UK, France, and Italy. Governments are under

HIGH UNEMPLOYMENT, INFLATION, AND SHORTAGES OF BASIC GOODS STILL IMPACT NORTH AFRICA, AND THE ECONOMIC IMPACT OF THE ISRAEL-HAMAS CONFLICT WILL LIKELY **WORSEN EXISTING ECONOMIC ISSUES IN THE REGION.**




increasing pressure from their citizens to bring the Palestinian cause back to the forefront of their agendas. Arab leaders cannot afford to ignore the anger emanating from the streets, especially as this renewed frustration toward government inaction in the Israel-Hamas conflict is compounding existing grievances. In the coming months, this concern will shape their policy positions towards Israel and the Palestinian question.

High unemployment, inflation, and shortages of basic goods still impact North Africa, and the economic impact of the Israel-Hamas conflict will likely worsen existing economic issues in the region. Protests are emerging in Morocco and Libya after deadly natural disasters exposed the lack of preventive measures and aid. In Tunisia and Egypt, increasing authoritarian tendencies are impeding protests but dissenting voices are rising despite the threat of retaliation. If governments cannot adequately address the people's previous and current political and economic concerns, additional disruptive demonstrations are likely throughout the region in 2024.

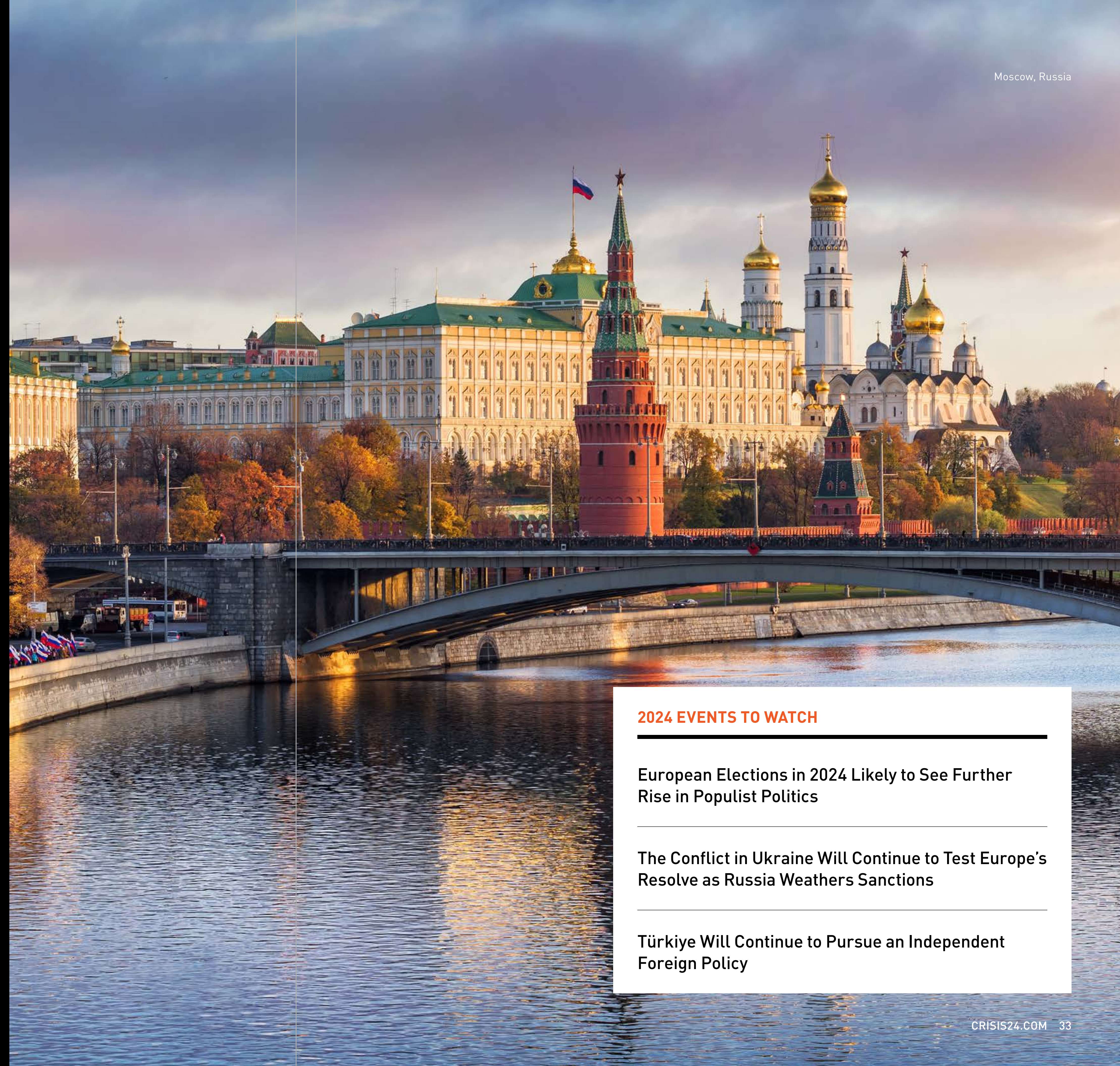
## CONCLUSION

**Hamas' attack has irrevocably altered the regional landscape, arguably for generations to come. Iran and its proxies do not desire a full-scale conflict with Israel or the US but rather to continue their harassment campaign in order to challenge the balance of power in the MENA region. The Persian Gulf monarchies fear further instability and the possibility of a broader conflict impacting their economic goals. The escalation of the Israel-Hamas war and its potential regionalization will likely exacerbate existing political, economic, and social issues in North Africa in 2024.**

# EUROPE AND RUSSIA

## Regional Outlook

Europe will face numerous challenges through 2024 with struggling economies, the impacts of the Ukraine conflict, and mass immigration all likely to increase the electoral allure of populist political parties over the coming year. Russia will show no signs of compromise in Ukraine, though the war will continue as an attritional and relatively static conflict, without substantial gains by either side. Elsewhere, Türkiye will continue to assert its influence in its geographic neighborhood, while balancing its relations with both Russia and its Western allies.



Moscow, Russia

**2024 EVENTS TO WATCH**

**European Elections in 2024 Likely to See Further Rise in Populist Politics**

**The Conflict in Ukraine Will Continue to Test Europe's Resolve as Russia Weathers Sanctions**

**Türkiye Will Continue to Pursue an Independent Foreign Policy**

# European Elections in 2024 Likely to See Further Rise in Populist Politics

European politics will likely be increasingly complex through 2024, as poor economic growth, the Ukraine conflict, and mass migration continue to present multi-national challenges. The European Union (EU) has shown impressive solidarity and increasing influence in recent years, but the continued influence of populists and rise of far-right parties will intensify differences between member states. Politicians of all leanings will track the US presidential race closely, and the cumulative effect of national, EU and indeed the US elections may impact the collective support for Ukraine.

National elections will be held in several European countries, and for the EU Parliament, in 2024. The EU and its member states will likely face the continuing challenges of the Ukraine conflict, slow economic growth, high inflation, and migration. These factors are dividing political support within countries and are increasing the tensions between member states. Support for populist leaders and far-right political groups has increased in recent years, although in 2023 there were mixed election results in Slovakia, Spain, and Poland. The results of the 2024 votes may alter Europe's political direction and its consequent support for Ukraine.

The existential challenges facing national governments across Europe will likely continue through 2024. The COVID-19 pandemic hit economic growth and national debt levels and the Russian invasion of Ukraine has driven up inflation, primarily in energy and food costs. Leaders' efforts to tackle climate change and manage mass migration have caused divisions within and between governments. Many countries have seen a rise in far-right pressure groups and political parties. Populists have sought to exploit division on societal and cultural issues and have encouraged "Euroscepticism." In Slovakia, the pro-Russian nationalist Robert Fico returned to power to lead a right-wing coalition. Conversely, voters in Poland rejected the Law and Justice (PiS) party, who had introduced increasingly reactionary domestic policies and undermined media and judiciary independence. Instead, Donald Tusk will lead a coalition of centrist parties to the marked relief of EU institutions.

In 2024, parliamentary elections that could return similar reversals will be held in Austria, Belgium, Croatia, Lithuania, and Romania, and presidential elections in Finland and Slovakia. Outside the EU, there will be elections in Georgia, Moldova, North Macedonia, and potentially the UK. In Ukraine, elections scheduled for May are postponed due to the state of emergency. Vladimir Putin is widely expected to win another term in Russian presidential elections in March.

## KEY JUDGMENTS

- → The recent trend for incumbent European governments to be defeated in national elections will likely continue through 2024, which will set the strategic direction for the region in coming years.
- → Economic and social conditions will remain challenging for governments, while the continued rise of populist and right-wing parties will likely seek to exploit cultural differences.
- → The cumulative effect of political changes will likely have a profound impact on international support for Ukraine.

EU Commission President Ursula von der Leyen and EU Council President Charles Michel will end their terms in 2024, as the EU and its member states face internal challenges and several key elections.

## POLITICAL TRENDS THROUGH 2024

Aside from Russia and Hungary, the recent trend across Europe has been for incumbent leaders to cede power to opposition parties due to the systemic issues including poor economic growth. The trend of increased popular support for far-right parties at the expense of traditional center-right parties will also likely continue through 2024. Recent elections have seen the success of Georgia Meloni's Brotherhood party in Italy, and the Sweden Democrats, an anti-immigration party, which entered Sweden's ruling coalition. The Alternative for Germany (AfD) party has had recent success in regional elections in a trend likely to continue in 2024. Polls show Austria's Freedom Party (FPO) could form a government in 2024; FPO is a populist, anti-vaccination party beset by recent scandals and with past links to President Putin. In Romania, a new environmental coalition may divide the electorate roughly equally between traditional, progressive, and far-right parties.

The 705 seats for Members of the European Parliament (MEPs) will be fought in June 2024. European elections have often been used by electorates as a protest opportunity, believing that the parliament has little impact. However, the political balance of the EU will be more important than ever in 2024. Firstly, the bloc has played increasingly strategic roles since the last election in 2019, in funding post-COVID economic recovery, maintaining coherent support for Ukraine, implementing sanctions on Russia, addressing security threats in the Balkans and the Caucasus, and maintaining unity over immigration policies. Furthermore, the EU Commissioners who run the executive branch are appointed based on the political balance in the European Parliament. Italy's prime minister, Meloni, is seeking to merge the center-right European People's Party (EPP) bloc with the further-right European Conservatives and Reformists (ECR) grouping. This would give disproportionate influence to the ECR within the commission. A further consideration is that the rotating presidency gives a six-month opportunity to set the agenda for the bloc. The presidency falls to Hungary in July 2024; as the trailblazer for illiberal, democracy-undermining populism, many centrist politicians will be concerned about Prime Minister Viktor Orban's intentions for this period.

## IMPACT OF ELECTIONS

Two further factors will weigh on European affairs through 2024. Firstly, the US election will take place in November and the presidential campaign will cast a long shadow over European politics. The Republican candidate is likely to be either Donald Trump, or another seeking to appeal to his supporter base. In either event, centrist European politicians will likely be apprehensive of a populist in the White House and the consequent impacts on international security, including on NATO and relations with Russia. Conversely, leaders including Orban and Fico, and right-wing candidates in upcoming elections, will likely welcome a Republican presidency as justification for their policies and for future partnership. The cumulative effect of European and US elections will likely also impact support for Ukraine, with potentially profound consequences. There are already fractures in the collective economic and military backing for Kyiv, including on agricultural trade and subsidies, and on sanctions on Russian entities.

## CONCLUSION

**Elections in 2024 for the European Parliament and in several member states may have strategic impacts for the bloc. As the EU has played an increasingly important role on the world stage, the rise of populism and far-right parties has exposed divisions within and between member states. The prospect of another populist US presidential term may cause both centrist and right-wing leaders to hedge their policy commitments. In a plausible scenario, the combined effect may undermine support for Ukraine and its ongoing conflict.**

# The Conflict in Ukraine Will Continue to Test Europe's Resolve as Russia Weathers Sanctions

Western sanctions on Russia will encourage alignment between Moscow, Beijing, Pyongyang, and Tehran, as countersanctions and increasing costs in Western countries will prompt malcontent among the public. Russia's military-industrial manufacturing, outpacing Ukraine, will allow some territorial gains throughout 2024; however, Kyiv's long-range strike capacity will further isolate Crimea and target Russian border regions, without causing a breakthrough on the frontline.

## KEY JUDGMENTS

- → Increasingly tough sanctions will prompt strategic alignment between Russia, China, Iran, and North Korea.
- → Russia's increased production and support from allies will be key to maintaining its military effort through the attritional phase of the conflict.
- → Kyiv's long-range strike campaign will increasingly isolate Crimea through 2024.

## THE CONSEQUENCE OF SANCTIONS

Russia's economy will continue to suffer from the effects of Western sanctions in 2024. The West will likely impose several rounds of sanctions on key government and business personnel, Russia's military industrial base, and banks. European efforts to assess Russia's frozen assets and re-invest them in Ukraine's post-war reconstruction will increase the fracture between the West and Moscow.

Russia's economy will face further sanctions through 2024; Western officials will increasingly seek to impose third-party sanctions on non-Russian entities and third countries allegedly evading the sanctions regime. However, sanctions alone are unlikely to significantly impact the battlefield. Conversely, increasingly tough sanctions will further catalyze the development of Moscow's partnerships with China, North Korea, and Iran. Potential strategic alignment between Russia and these nations will deepen the polarization of the international community. Furthermore, their alignment will represent a serious challenge to the West's economic, security, and diplomatic goal of isolating Moscow.

Sanctions are unlikely to have a great effect on Russian institutions. Putin and his inner circle of government loyalists and oligarchs will maintain a tight grip on all state institutions, particularly the security services and the hydrocarbons sector. Conversely, as Western sanctions further shrink the economy, Russia will maintain that the conflict with Ukraine is an existential confrontation with the West. Russia will likely impose countersanctions on the European market, particularly targeting Western companies that maintain operations or investments in Russia. It remains likely that Russia will cut off all gas deliveries via Ukraine, causing a spike in gas prices towards the end of European winter. High energy prices, higher costs of goods, and rising inflation will reshape the European public's support for Ukraine. While senior EU officials will insist on supporting Ukraine, public opinion will likely be increasingly more conflicted. Russian propaganda and misinformation campaigns will seek to exploit and exacerbate the genuine grievances of European citizens.



**Russo-Ukrainian Conflict Map: Possible Infrastructure Targets of Long-Range Strikes through Winter 2023–2024**


## THE CHANGING NATURE OF THE CONFLICT

Ukraine will likely pause major operations until at least spring 2024, enduring increased Russian aerial attacks on its critical national infrastructure (CNI) and consistent ground assaults. Russian forces will maintain their numerical superiority through the quiet mobilization of reservists and conscripts. Russia will continue to increase production of armored vehicles and ammunition, while leveraging agreements with China, North Korea, and Iran to receive materiel and essential technology, allowing Moscow to continue major operations. As a result, Kyiv's troops could be forced to retreat in several areas of eastern Ukraine through the winter. Areas west of the Svatove-Kreminna line remain particularly vulnerable to increased Russian offensive activity in early 2024.

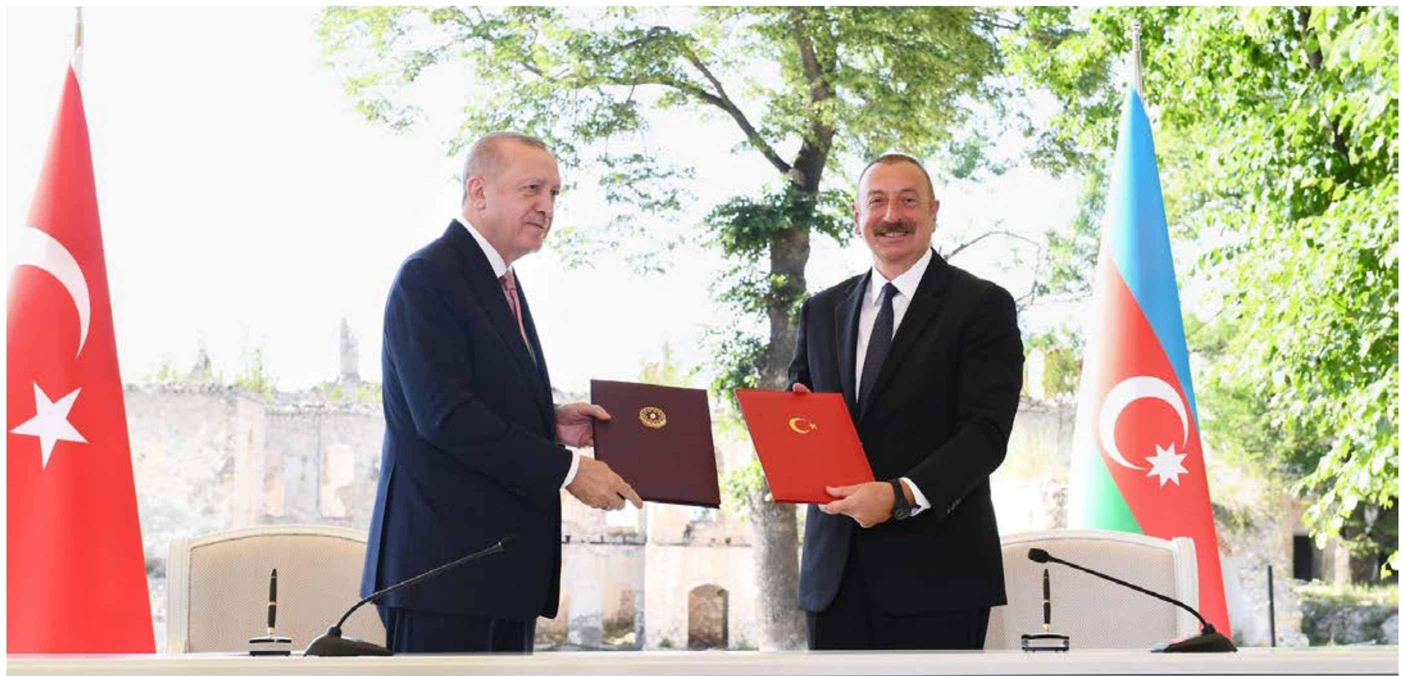
Russia's industrial strength will become increasingly relevant through 2024, as attritional warfare takes a heavy toll on Ukraine's forces. Russia will extend its already considerable production edge over Ukraine and the West. However, this advantage will not be decisive on the battlefield. While Moscow will be able to deploy a constant stream of men, weapons, and equipment, it is unlikely to reach the critical mass needed to push Ukraine into a defensive collapse. Russian forces will likely maintain a high operational tempo at specific points along the frontline, challenging Kyiv's defensive capabilities without completely overwhelming them.

Ukraine will expand its deep strike campaign, both on the battlefield and on Russian territory. Kyiv will likely follow through on threats to respond to airstrikes on its CNI by hitting Russia's energy network; the border regions of Krasnodar, Rostov-on-Don, Voronezh, Belgorod, Kursk, and Bryansk are likely targets of Ukraine's retaliation. Further strategic strikes are likely on Crimea's transport and energy infrastructure, potentially isolating the peninsula by the end of 2024. Any attempts to use the Russian navy to transport supplies carry significant risks as Ukraine's naval strike capability increases. Russian forces on the peninsula will face increasing raids by Ukrainian special forces, as well as logistical challenges.

## CONCLUSION

**Russia's military production edge combined with Ukraine's reliance on the West will pose increasing challenges for Ukraine. Russia will seek to exploit high energy prices and the decreasing popularity of European support for Kyiv using countersanctions and propaganda. Rising prices, hardening public opinion, and war fatigue will present serious risks to Europe's continued massive support for Ukraine's war effort. However, while Ukraine's ground assaults will decline, Kyiv's increasingly sophisticated deep-strike campaign will threaten Russia's control of Crimea, but risks escalating the conflict.**

# Türkiye Will Continue to Pursue an Independent Foreign Policy



Continued military support for Azerbaijan will represent just one axis of Turkish foreign affairs in 2024.

2024 will see Türkiye continue its trend of increasing geopolitical assertiveness, particularly across the Black Sea and in its geographic neighborhood. Ankara's unique political position will allow it to continue to pursue bilateral agreements with Russia, which along with its involvement in the Caucasus will draw occasional criticism from the West. Additionally, economic incentives will compel Türkiye to end its blocking of Cypriot gas development.

## KEY JUDGMENTS

- Western criticism will not prevent Türkiye from pursuing its perceived interests regarding Russia and Armenia.
- Russia's withdrawal from Armenia will facilitate Azerbaijan's Turkish-backed establishment of the Zangezur Corridor.
- Ankara will compromise with Nicosia to benefit from Cypriot natural gas exploitation before Cyprus commits further to export via other regional partners.

## UKRAINE

Ankara's unique geopolitical positioning allows it to maintain close relations with both parties of the Russia-Ukraine war; however, parlaying this position into a significant diplomatic breakthrough remains unlikely. Türkiye remains a major exporter of military hardware, particularly Bayraktar drones, to Kyiv. Ankara has acted as a unique NATO intermediary with Russia throughout the conflict and will continue its efforts to revive the Black Sea Grain Initiative, though the continued dissolution of European-Russian diplomatic relations makes this highly unlikely. Given Türkiye's heavy reliance on Russian grain (historically making up 65 percent of Turkish grain imports), Ankara will likely attempt to reach a bilateral deal with Russia to facilitate grain imports, drawing the ire of Ukraine and Türkiye's fellow NATO members.

## CAUCASUS

Türkiye's support for Azerbaijan in its ongoing conflict with Armenia will continue in 2024 regardless of any progress towards a negotiated peace agreement. Following the reincorporation of Nagorno-Karabakh, Baku is left with the decision of whether to use military force in pursuit of additional concessions from Yerevan. Turkish officials, including President Erdogan, have echoed Azerbaijani calls for the establishment of the Zangezur Corridor, a proposed ribbon of Azerbaijani-controlled territory cutting through Armenia to Azerbaijan's Nakhchivan exclave. Such action would be unthinkable if not for Russia's current security distraction with Ukraine and effective withdrawal of interest from the south Caucasus. Besides Ankara and Baku's historically close relations, there is a pragmatic reason for Turkish support for Zangezur: Nakhchivan is the only Azerbaijani territory that borders Türkiye, and a direct line from Azerbaijan's populous Caspian Sea coast to Anatolia would allow Ankara to profit from closer trade ties and lucrative natural gas export projects.

While Azerbaijani and Armenian leaders may sign a formal peace treaty, such an agreement is unlikely to include truly unlimited overland access to Nakhchivan; Baku therefore has a heavy incentive to pursue the establishment of the Zangezur Corridor by force despite any agreement. Turkish support has played a decisive role in Baku's recent military successes, and heightened trade in military hardware strongly correlates with Azerbaijani military actions. Turkish military exports to Azerbaijan increased a hundred-fold year-on-year in the quarter before the 2020 Armenia-Azerbaijan conflict. A similar spike in Turkish arms and hardware exports to Azerbaijan is likely in the coming year and will act as a strong indicator of imminent conflict.

## CYPRUS

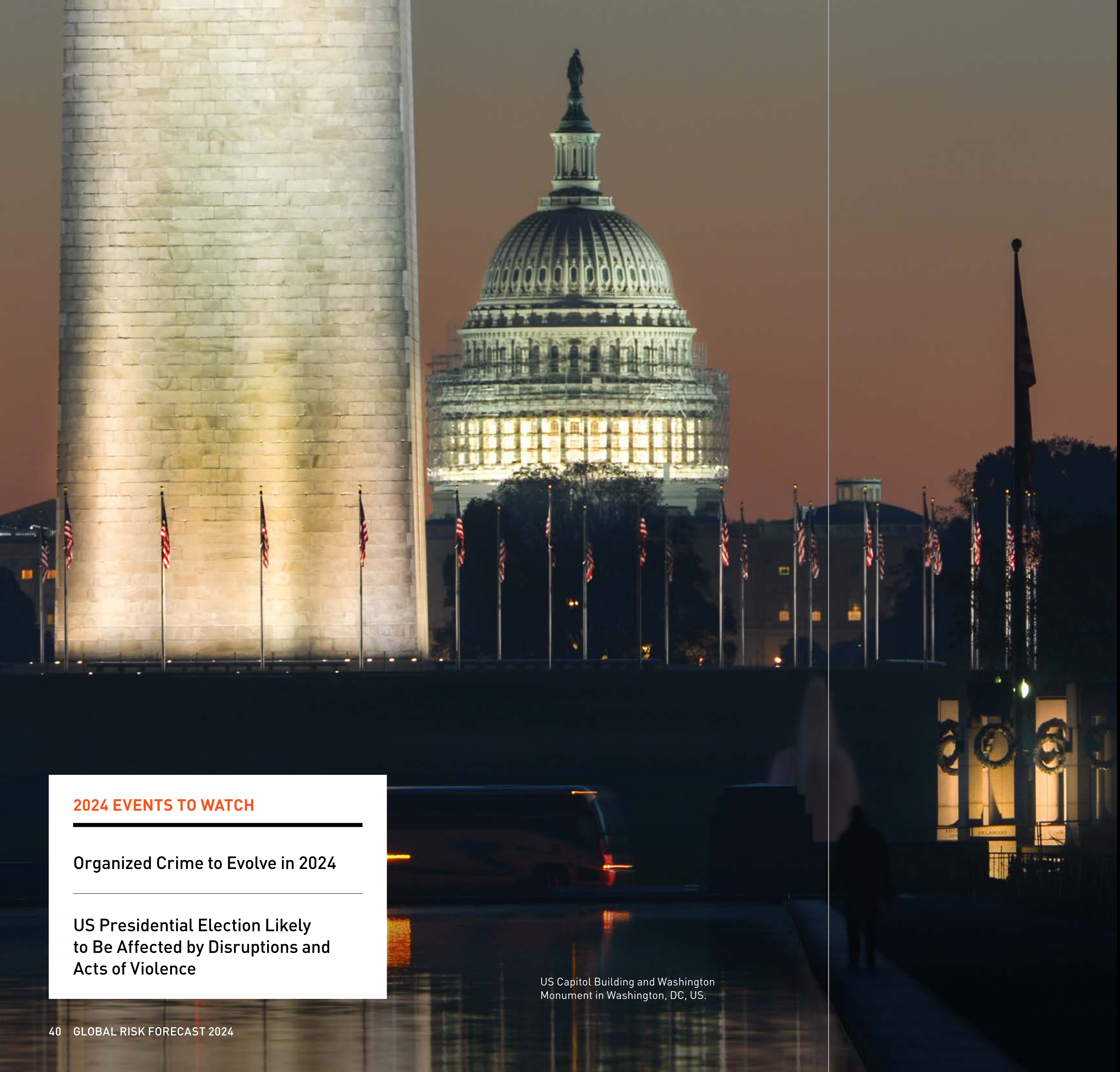
Economic incentives will compel Ankara to allow the development of Cypriot offshore natural gas deposits in 2024. Türkiye, the political backer and sole recognizer of the breakaway Turkish Republic of Northern Cyprus, refuses to permit drilling granted by the internationally recognized government in Nicosia in disputed waters to proceed. However, two factors will force Ankara and Nicosia to seek some degree of cooperation with Cyprus this year: firstly, extraction at the Aphrodite field (located outside of disputed waters) is set to begin in mid-2024 and will serve as a proof-of-concept for Cypriot offshore drilling. Secondly, the likely long-term continuation of Western sanctions on Russian hydrocarbon exports will keep global gas prices high. Together, these developments will show Ankara that accessible natural gas is within reach, while also incentivizing Türkiye to secure affordable energy sources. Ankara will likely soften its stance towards Cypriot resource extraction on the condition that it be the primary destination of exports of projects in disputed waters.

## CONCLUSION

**Western allies will likely express discontent with Türkiye's policies towards Ukraine, the Caucasus, and Cyprus, accusing Ankara of undermining NATO's anti-Russian cohesion, fomenting armed conflict, and extracting concessions based on illegitimate territorial claims, respectively. However, Western allies are unlikely to take any substantive punitive action. The only major Western attempts to curtail Turkish foreign involvements in recent years were Swedish and Finnish arms embargoes, both of which were lifted as part of Stockholm and Helsinki's NATO accession efforts. Similarly, the withdrawal of Russia as a pro-Armenian counterweight and the international community's distraction due to the Russia-Ukraine and Israel-Palestine conflicts give Ankara a unique opportunity to act without scrutiny. Türkiye can therefore pursue these international interests without resistance from major powers.**



Image credit: President.az



US Capitol Building and Washington Monument in Washington, DC, US.

**2024 EVENTS TO WATCH**

Organized Crime to Evolve in 2024

US Presidential Election Likely to Be Affected by Disruptions and Acts of Violence

# AMERICAS

## Regional Outlook

Two of the most pressing issues in the Americas region in 2024 will be the evolution of organized crime in Latin America and the US presidential elections. Mexican drug trafficking organizations (DTOs) will not only expand into relatively peaceful areas of Mexico, but they will also make inroads into other countries in the region. In addition, major Brazilian criminal gangs will develop into international criminal organizations. In the US, the run-up to and aftermath of the 2024 presidential election will likely have significant security implications for the country.

# Organized Crime to Evolve in 2024

Organized crime will continue to evolve in 2024, with Mexican drug traffickers expanding their reach into previously peaceful areas of Mexico as well as other countries, seeking to use Ecuadorian, Colombian, and Costa Rican criminal organizations as their proxies. Brazilian criminal organizations, meanwhile, will consolidate their stronghold over local black markets and complete their conversion from street gangs to major international crime syndicates.

## KEY JUDGMENTS

- In Mexico, drug-related violence is likely to worsen in the country's south.
- Mexican traffickers are likely to seek to expand their presence internationally, including in Ecuador, Colombia, and Costa Rica.
- In Brazil, the First Capital Command is likely to attempt to consolidate its power and complete its conversion from a street gang to a major international trafficking organization.

## DRUG-TRAFFICKING ORGANIZATIONS TO EXPAND IN MEXICO

Drug-related violence in Mexico is likely to persist in 2024 as drug trafficking organizations (DTOs) expand their reach. Previously, rampant drug-related violence between rival gangs and the authorities occurred primarily in the northern and coastal regions. However, such violence has now significantly escalated in southern Mexico, which in 2024 is likely to become a major flashpoint for DTO fighting. DTOs such as the Jalisco New Generation Cartel (Cártel de Jalisco Nueva Generación, CJNG) and the Sinaloa Cartel (Cártel de Sinaloa, CDS) are increasing their presence in and around the southern state of Chiapas; fighting over drug trafficking routes along the border with Guatemala is likely to worsen.

DTOs are also highly likely to continue enhancing their capabilities to challenge authorities in 2024. Criminal groups have showcased an increased willingness to attack security personnel using explosives, including both improvised explosive devices left near crime scenes to target responding police and small explosives such as hand grenades dropped by drones onto targets. Hundreds of police officers have died so far this year, and given the escalating DTO influence and capabilities, confrontations between rival DTOs are likely to continue into the next year.

## MEXICAN DTOS LIKELY TO INCREASE INTERNATIONAL PRESENCE

An alarming trend seen in 2023 that will likely accelerate in 2024 is the internationalization of the Mexican drug war. Recently, violent crime has skyrocketed in Ecuador due to fighting between the country's two largest rival gangs, the Tiguerones and the Choneros. However, the crisis is profound due to the involvement of Mexico's two most powerful DTOs, which have sought to use the fighting as a proxy war. The Tiguerones are now backed and armed by the CJNG, and the CDS support the Choneros.

The involvement of the Mexican DTOs in gang disputes abroad has the potential to overwhelm the security apparatus in most Latin American countries. In Ecuador, security forces have already effectively lost the ability to control the levels of violence in Guayaquil, the country's largest city, due to the potent mix of bribery and intimidation by rival criminal groups, which feel secure in their positions due to their Mexican backers. Additionally, with the backing of their Mexican allies, Ecuadoran gangs are now able to routinely detonate improvised explosive devices to intimidate people in businesses into paying extortion fees and, at times, to retaliate against prison officials for cracking down on imprisoned gang leaders who direct their criminal enterprises from jail.


Having been able to undermine the security situation in Ecuador so quickly, Mexican DTOs are likely to attempt to replicate their success elsewhere by involving themselves with criminal organizations in other countries. Mexican DTOs already find themselves in a loose alliance with Colombian criminal organizations since Ecuadoran gangs have connections to rival Colombian criminal groups such as the Urías Rondón Mobile Column (Columna Móvil Urías Rondón, CMUR), a dissident branch of the Revolutionary Armed Forces of Colombia (Fuerzas Armadas Revolucionarias de Colombia, FARC), and the Oliver Sinisterra Front (Frente Oliver Sinisterra, FOS), a separate dissident FARC group. In 2024, the Mexican DTOs may attempt to deepen this relationship and directly involve themselves in disputes in Colombia's vast criminal underworld.

Mexican DTOs are also likely to attempt to insert themselves in the growing conflict between Costa Rican drug traffickers to undermine the security situation in that country to further develop its use as a transshipment point to bring South American cocaine to Mexico. The conversion of Panama into a major transshipment point would likely be accompanied by a significant increase in violent crime there and the degradation of government institutions due to bribery and intimidation.

In any location where Mexican DTOs begin to play a bigger role, businesses will be at increased risk. Mexican DTOs have long diversified their revenue streams by extorting businesses, stealing fuel, producing counterfeit goods, and robbing major investment projects such as mines. These DTOs would likely bring such practices with them should they become involved in other countries. Additionally, their involvement in any local conflict would significantly increase the risk faced by travelers, as these groups often resort to indiscriminate violence, for example, by carrying out mass shootings in establishments that fail to make timely extortion payments, putting bystanders at risk.

## ORGANIZED CRIME TO PRESENT MAJOR THREATS IN BRAZIL

The escalation of rivalry among criminal groups in some of Brazil's main urban centers, such as Rio de Janeiro and Salvador, is likely to increase violent territorial disputes in 2024. In Rio de Janeiro, gangs that are mostly made up of former and current police officers, locally known as "militias," are likely to continue clashing with DTOs for territorial control, especially in the city's West Zone. The escalation of violence between DTOs and militias in 2023 indicates a greater risk of violence spreading beyond the city's usual DTO-dominated favela hotspots in 2024.

THE INVOLVEMENT OF THE MEXICAN DTOS IN GANG DISPUTES ABROAD HAS THE POTENTIAL TO **OVERWHELM THE SECURITY APPARATUS IN MOST LATIN AMERICAN COUNTRIES.**

High levels of violence are also likely to continue in Salvador. As the city's international port is a sought-after trafficking hub for smuggling cocaine to Europe, Brazil's largest DTOs, São Paulo's First Capital Command (Primeiro Comando da Capital, PCC) and Rio de Janeiro's Red Command (Comando Vermelho, CV) have been providing local gangs with resources and weapons to advance their territorial disputes in the city and surrounding areas. As a result, despite a general decrease in the nationwide homicide rates in recent years, cities like Salvador and Rio de Janeiro are likely to go against this trend, with criminal groups becoming increasingly fragmented and better equipped to challenge each other and the local authorities.

Elsewhere, especially in São Paulo, the PCC has largely triumphed over the CV and is consolidating its hold over the black market. In 2024, the PCC is likely to attempt to complete its transformation from a street gang to a major DTO with deep ties to the international drug trade. To this end, the PCC is likely to attempt to seize control of a variety of criminal enterprises by several means, from working with the Italian 'Ndrangheta to smuggle cocaine to Europe, to running theft and extortion rackets in neighboring Paraguay, to influencing illegal logging rings in the country's interior. Through such actions, the PCC could become an even more powerful actor in Brazil and internationally.

### LATIN AMERICANS LIKELY TO DEMAND AUTHORITARIAN MEASURES TO CONTROL CRIME

In 2024, Latin Americans are likely to increasingly look toward the harsh anti-crime measures adopted by El Salvador, where President Nayib Bukele has imposed a state of emergency and arrested tens of thousands of accused gang members, as a solution to crime in their own countries. The newly elected leaders of Ecuador and Guatemala are likely to come under particularly intense pressure to adopt similar measures, and the presidents of Peru and Costa Rica will likely also face popular demands to crack down on crime, even at the expense of the rights of the accused. However, the leaders of these countries do not all have the same constitutional powers as Bukele does in El Salvador, and the nature of criminal groups in each country is highly varied, making a one-size-fits-all solution of simply copying El Salvador unlikely to be effective. Consequentially, countries may face a growing disconnect between popular demands and governmental abilities to meet them, increasing the risk of unrest.

### CONCLUSION

**Latin America faces a threat from its major criminal organizations, with Mexican DTOs now strong enough to exert their power not only throughout all of Mexico, including areas that were once relatively peaceful, but also in other countries in the region, using local gangs as their proxies. However, in Brazil, one of the few Latin American countries where local gangs are powerful enough to resist Mexican DTO influence, the gangs, especially the PCC, are consolidating and seeking to convert their groups into major players in international black markets. Mexican and Brazilian groups, therefore, will pose risks throughout Latin America in 2024, and while people will increasingly demand authoritarian measures to combat crime, these are unlikely to prove successful at improving the security situation.**



# US Presidential Election Likely to Be Affected by Disruptions and Acts of Violence


The White House in Washington, DC, US.

The 2024 presidential election in the US will likely be a rematch between President Joe Biden and former president Donald Trump. The election is likely to be close, decided by only a few states, and some of these states have election laws that may lead to a drawn-out count, increasing tensions and likely leading to protests and possible violence. A significant portion of the former president's supporters believe the 2020 election was not fairly decided, further increasing the likelihood of unrest should Trump lose. If Trump wins, his detractors will likely take to the streets.

Despite a Republican primary with several candidates looking to block President Joe Biden's reelection bid, the 2024 US presidential election is likely to be a rematch of the 2020 contest between former president Donald Trump and President Joe Biden, and the results will likely be close, with the winner depending on tens of thousands of votes in fewer than 10 states. This context raises the likelihood of heightened tensions, disruptive protests, and potential violence before and after the election, similar to what occurred in 2020 and early 2021.

### NO SIGNS OF A LANDSLIDE ELECTION

The fact that the election is likely to be closely decided heavily contributes to the likelihood of election-related disruptions and even violence. The election of the US president does not depend on the national popular vote but on state-by-state polls, where the winning candidate obtains a specific number of electoral college votes. Based on recent trends and the current levels of political polarization, there are only around 10 states with high uncertainty about who the winner might be. Among those, the election is likely to be especially close in Arizona, Georgia, Michigan, Nevada, North Carolina, Pennsylvania, and Wisconsin.

Those states, in addition to the capital, Washington, DC, are most likely to be the location of protests and potential violence, as candidates and their supporters will likely concentrate attention and resources on them. In some of these places, the electoral laws will also increase tensions by making it likely that the certification process will take several days. In certain states, it is possible that whoever

### KEY JUDGMENTS

- The US presidential election will likely be narrowly decided in a handful of states.
- The fact that many disbelieve the results of the 2020 election bodes poorly for the 2024 polls.
- Although the election's winner is very likely to be sworn into office, major protests and violence are possible.

is ahead on the night of the election may end up losing the state; this occurred in the states of Georgia and Pennsylvania in 2020.

## DISBELIEF IN THE PROCESS CREATES COMPLICATIONS

Over more than three years, public opinion regarding the result of the 2020 presidential election has remained almost unchanged: fewer than 40 percent of Republican voters believe Joe Biden won the election fairly, with a majority thinking his victory was due to some level of fraud. Overall, around a third of the entire electorate feels that way despite the lack of evidence. In recent months, close associates of Trump have pleaded guilty in different court cases related to their attempt to overturn the 2020 election. However, that is also unlikely to move voters' minds, as Trump himself continues to denounce the 2020 election results.

The violent protests that took place at the US Capitol on Jan. 6, 2021, to stop the certification of the presidential election, were motivated by the demonstrators' feeling of being disenfranchised, a feeling that appears likely to remain with most of them in 2024. If Trump were again to lose in a close election in November, there are many reasons to believe he would question the result, and his followers would feel even more reasons to protest the outcome. This time, they would likely be better organized but would encounter heavier security.

## AN ELECTION INCREASINGLY UNDER THREAT

Whoever obtains the majority of the electoral college votes in the 2024 presidential election is highly likely to be declared and certified as the winner, as attempts to overturn the previous election results were unsuccessful. However, given that Trump has still not accepted the results from the previous election, he is likely to file legal challenges to any future electoral results that are unfavorable to him. While a similar threat to the process does not exist on the Democratic side, a victory from Donald Trump would likely also trigger numerous and possibly disruptive protests, given the levels of animosity between activists from both parties.

THE FACT THAT THE ELECTION IS LIKELY TO BE CLOSELY DECIDED HEAVILY CONTRIBUTES TO THE LIKELIHOOD OF **ELECTION-RELATED DISRUPTIONS AND EVEN VIOLENCE.**

## CONCLUSION

**It is possible that protests similar to those seen in 2020 could occur in 2024. However, with higher levels of organization and accumulated grievances, this also increases the chances of more violence happening, with greater casualties than the relatively limited ones that occurred on Jan. 6, 2021. Such levels of unrest could even further polarize the US, leading to major protests and possibly even riots around both the elections in November and the election certification and inauguration processes that stretch into January 2025. Following the 2020 elections, businesses throughout the US, especially those in Washington, DC, and the state capitals, were affected by protests, with many retail locations boarding up stores and offices and ordering their employees to work from home. Such disruptions could recur, or even be magnified, in 2024.**

Washington, DC, US

# KEY RISK TRENDS

# ENVIRONMENT

## Impact of Record-breaking Temperatures Likely to Continue through 2024 and Beyond

It is almost certain that—globally—2023 will be the hottest recorded year to date following unprecedented temperatures and prolonged heatwaves in many parts of the world, especially during the northern hemisphere summer. Forecast models indicate that 2024 could be hotter still due to the continued impacts of climate change and the persistence of an El Niño climate phase. As extreme high temperatures start to become more commonplace, it is important to gain a broader understanding of why this is happening and what the impacts are in order to respond to the challenges a warming world will bring.

### HIGH TEMPERATURES TO PERSIST

June–August 2023 was the planet's warmest such period since records began in 1940, with repeated record-breaking heat waves and high ocean temperatures. Forecast models indicate that 2024 could possibly be hotter still due to the continued impacts of climate change and the El Niño climate phase over the coming months.

Although we are witnessing an overall upward trend, global average temperatures do not continually rise every year. While climate change is likely to continue and is largely predictable, it can be masked by weather events and natural variability on interannual (El Niño-Southern Oscillation (ENSO)) or decadal time scales, especially at the local level. The biggest increases in temperatures, and the warmest years, tend to happen in the latter stages of an El Niño climate phase.

During El Niño, heat stored at depth in the western tropical Pacific spreads across the rest of the Pacific, increasing sea surface temperatures. The heat is subsequently released into the atmosphere, increasing temperatures. El Niño is forecast to peak early 2024 and is likely to contribute to high temperatures in 2024.

### KEY JUDGMENTS

- 2024 is forecast to eclipse 2023 as the hottest year on record with consequent impacts on human activity in many areas.
- Higher temperatures will likely lead to increased frequency and intensity of extreme events such as wildfire activity and drought.
- Wide-ranging impacts are likely in many locations and in many societal and industrial sectors, including agriculture, health, energy, travel, and tourism.

### IMPACTS OF HIGH TEMPERATURES

Further record-breaking heat episodes will exacerbate impacts on areas such as agriculture, increased wildfire activity, health, and supply chains. Heatwaves pose a health threat to vulnerable groups, such as the elderly, children, pregnant women, and those with respiratory illnesses, due to the increased possibility of heat stroke or heat exhaustion during prolonged exposure to high temperatures. These risks could also extend to relatively healthy individuals during significant heatwave events. In addition to severely impacting those who spend prolonged periods outdoors, high temperatures can cause problems for people using mass transit. Some passengers may require hospitalization for dehydration due to the lack of air conditioning and cramped vehicles during rush hour.

Heat puts significant strain on electronics, especially batteries, leading to increased wear and failure. Overheated vehicles during summer months could prompt traffic disruptions in urban areas where congestion is already a problem. Commercial trucking disruptions might also occur, as very high temperatures put more stress on vehicles and make tire blowouts more common. Major flight disruptions are unlikely at regional airports, but general aviation disruptions are possible as high temperatures decrease air density, reducing the amount of weight an aircraft can support during flight. Significant travel delays or flight cancellations are possible, and some airfreight carriers could reduce cargo loads.


Wildfire in British Columbia, Canada.

High temperatures will lead to an increased demand for electricity as people try to cool off and the efficiency of machines and electronics decreases. Authorities in China have had to ration power usage in parts of the country during the past two summers due to the increased demand placed on the grid amid heatwaves. The strain on the power grid might trigger localized brownouts or blackouts, exacerbating hazardous conditions when air conditioning is no longer possible.

Drought conditions impact agricultural yields and lead to water rationing measures, while low water levels at hydropower plants could result in lower or no power production, leading to energy disruptions. This can lead to supply shortages and rising costs of goods, and trigger food insecurity.

High temperatures and low humidity will increase the risk of wildfires. It is likely that some regions may see record levels of wildfire activity in 2024 similar to those witnessed across Canada in 2023. Wildfire activity, especially near populated areas, could cause mass evacuations and transport disruptions as well as disrupt holiday plans. Smoke from wildfires blown by prevailing winds could impact residents a significant distance away. Vulnerable groups, including children, the elderly, people suffering from asthma or other lung diseases, and people with heart disease, are at particular risk of negative health consequences from the smoke. Low visibility from smoke and possible ashfall could contribute to flight and vehicular traffic delays and congestion. Power outages are possible if fires damage power infrastructure. Authorities may cut off power to parts of the affected area to aid firefighting efforts.

Travelers may start to avoid traditional summer destinations due to heat. Tour operators have stated that they are not seeing a significant change in booking patterns as yet; however, they are concerned that if periods of extreme heat continue in certain areas, like southern Europe, over the coming years, travelers may start to avoid these regions during the traditional peak summer months. Regular events like summer sporting tournaments and festivals will likely need to be rescheduled due to heat concerns.

### CONCLUSION

**High temperatures will likely continue in 2024 due to climate change and El Niño. Heatwaves are likely to result in increased wildfire activity and drought, as well as impact many other areas like agriculture, health, energy, and tourism.**

# MARITIME

## Troubled Waters: Regional Tensions Affecting Key Shipping Lanes

The Arabian Peninsula and South China Sea have seen developments that are likely to impact global maritime trade through 2024. In the Arabian Peninsula, improved relations between Iran and Saudi Arabia and relative calm in Yemen after years of conflict gave hope of improved maritime security in the region. However, a new wave of fighting between Israel and Hamas that began Oct. 7 has the potential to undo this. In the South China Sea, a territorial dispute between China and the Philippines over the Spratly Islands has resulted in several incidents; should the trend continue, it could cause disruption to one of the world's most important shipping routes.

### KEY JUDGMENTS

- Around the Arabian Peninsula, Iran and/or Iranian-backed groups are likely to increasingly target Israel- or US-linked maritime assets in important waterways, causing disruption. In the South China Sea, incidents between Chinese and Filipino naval forces and their non-military affiliates look set to continue an escalatory trend, possibly leading to disruption in a globally significant shipping lane.
- The likelihood of full-scale conflict is low in both areas and the flow of goods is likely to continue in most circumstances short of this.
- Shipping prices, availability, and lead times are the most likely to be affected.

### ARABIAN PENINSULA

Spillover from the conflict in Yemen and periodic Iranian drone attacks, vessel seizures, and small boat approaches will continue to contribute to regional maritime insecurity around the Arabian Peninsula. Nevertheless, 2023 saw a decrease in incidents off Yemen following an April–October 2022 ceasefire between the Iran-backed Al-Houthi movement and the Saudi-backed government. This has resulted in a halt in the targeting of Saudi ports and maritime assets, as well as an apparent cessation of the use of waterborne improvised explosive devices (WBIEDs) and naval mines in the southern Red Sea. Saudi and Iranian steps to normalize relations throughout 2023 are likely to result in this trend continuing into 2024. Occasional small arms attacks against small cargo vessels and yachts in the vicinity of Al-Hudaydah, Yemen, have continued, however. While these may indicate that rogue groups within the Al-Houthi movement are acting independently in search of income, the majority have been attributed to Yemeni Coast Guard interdiction efforts. Such incidents are likely to continue sporadically, though they are unlikely to pose a significant threat to larger vessels. Tensions between Yemen's Saudi-backed government and the UAE-backed Southern Transitional Council (STC) are also likely to continue, leading to a continued level of instability in and around Yemen.

### EFFECT OF ISRAEL-HAMAS CONFLICT

The large-scale incursion into Israel by the Gaza-based Hamas militant group on Oct. 7, and Israel's subsequent response, have cast doubt on the likelihood of a significantly improved maritime security situation off the Arabian Peninsula. Iran and the Al-Houthis announced support for Hamas, with the Al-Houthis periodically launching missiles and drones in the direction of Israel. Attacks and hijackings targeting Israeli-linked vessels and US warships have taken place in the Red Sea, Gulf of Aden, and Arabian Sea. The possibility of an attack targeting Israeli or US-linked vessels, as well as vessels linked to any other nation deemed supportive of Israel is likely to remain elevated in 2024. Furthermore, the threat level is to remain elevated for all shipping due to the potential for miscalculation and error.

Although Gaza's relative proximity to the Suez Canal may be cause for concern, traffic in the canal is unlikely to be affected by the current situation. Security in the vicinity of the canal is robust, and Gaza-based militant groups are unlikely to attempt to target the waterway as it is improbable that such an attack would further their strategic goals.

Any deterioration of the maritime security situation off the Arabian Peninsula has the potential to significantly affect global supply chains. Approximately 20–30 percent of global oil consumption passes through the Strait of Hormuz, while approximately 12 percent of global trade passes through the Bab-el-Mandeb Strait on the way to the Suez Canal.

### SOUTH CHINA SEA

In the South China Sea, tensions over Chinese territorial claims to the Spratly Islands will continue to escalate. This trend has been particularly visible in the vicinity of the Second Thomas Shoal, located 105 NM (194 km, 120 miles) west of Palawan, Philippines, and within the Filipino exclusive economic zone (EEZ). The increasingly frequent incidents have centered around Chinese efforts to deter Filipino attempts to resupply an outpost on the shoal and have included the use of water cannons and aggressive maneuvering by China. While a full-scale conflict over the Spratly Islands remains unlikely at present, clashes between Filipino and Chinese naval forces have the potential to further escalate in 2024. The likelihood of a collision seems increasingly realistic, and any incident involving loss of life or of a vessel is almost certain to result in a flare-up. This could take the form of a buildup of naval forces, closed maritime areas, or, in extremis, the limited targeting or seizure of vessels belonging to the opposing side. A sufficiently severe incident also has the potential to draw in the US through a mutual defense treaty with the Philippines. Such scenarios are likely to cause delays or increased insurance premiums, and by extension, increased shipping prices. Approximately 20–33 percent of global trade passes through the South China Sea to and from the Malacca Strait; a deteriorating security situation there would be felt worldwide.

### CONCLUSION

**The shipping channels examined in this Global Forecast are key to global maritime trade. Any disruption to them is likely to have important ramifications, be it for oil and Asia-Europe trade in the case of the Arabian Peninsula, or for trade to and from East Asia in the case of the South China Sea. Although neither region is likely to see full-scale conflict in 2024, and trade is almost certain to continue in the majority of cases, increasing tensions are liable to affect prices, availability, and lead times.**

APPROXIMATELY **20–33 PERCENT OF GLOBAL TRADE** PASSES THROUGH THE SOUTH CHINA SEA TO AND FROM THE MALACCA STRAIT; **A DETERIORATING SECURITY SITUATION THERE WOULD BE FELT WORLDWIDE.**

# AVIATION

## Technology to Dominate Evolution of Passenger Air Travel

The upcoming and ongoing technological advancements in the aviation industry will directly impact passenger travel through 2024. The advancements, largely supported by the necessity of contactless travel in recent years, have significantly influenced public opinion, encouraging further digitization of passenger travel. Airline advancements, ease of travel, immediate assistance, and passenger luxuries through technology will likely impact travelers' preferences for airlines, increase transparency in the industry, and foster increased growth. As Artificial Intelligence (AI), advanced air mobility (AAM), biometrics, and drones continue to gain traction in their utilization and development, the industry is expected to contend with privacy, security, safety, and ethics concerning these advancements.

### CHANGES ON THE AVIATION HORIZON

Global developments in aviation will have a far larger impact than solely passenger travel, though many are sure to have direct impacts—both large and small—on individual travelers. Passenger expectations, such as personal customization, digital interface, and increased efficiency have rapidly changed, over the last three years as the circumstances—particularly the impact of the COVID-19 pandemic—provided a direct necessity and push for it. These developments, and other advancements, including biometrics, AI, connectivity, automation, and AAM will now likely determine the success of a carrier or airport.

The implementation of the advancements in the short-, medium-, and long-term timeframes will largely depend on the continued development of the technology, geographic location, public use, and mandated policies and procedures required by country civil aviation authorities (CAA). The possibilities for the use of emerging technology in this space are expansive, and anticipating developments on the horizon will allow stakeholders the opportunity to respond and utilize the advancements with safety and security in mind.

### KEY JUDGMENTS

- The public trend toward on-demand services and trip customization will likely continue to push the aviation industry toward digital transformation in the near term.
- The increased policies toward passenger rights, fare transparency and efficient travel will continue the use of AI for predictive analysis, fee maximization, and biometrics.
- Passenger luxuries with advanced air mobility, automation and large-scale use of drones will likely see implementation in the medium-to-long term, and with it, a new era of aviation.

**SHORT TERM**
The use of biometrics in travel will increase throughout the travel journey, including exploiting face and fingerprint data through all phases of a flight, from booking to luggage pickup. The biometric "single token" or "one ID," already in place in a small number of international airports, is expected to expand in airports across the globe. These programs allow travelers the ability to identify themselves once with documents, and each successive checkpoint requiring only biometrics, with the elimination of travel documents altogether as a likely goal. The use of biometrics will also enable real-time tracking and updates to any object or luggage attached to that traveler's biometric "file," or for lounge access and aircraft boarding.

The use of AI in aviation is already embedded into many processes, and the industry will continue using it for predictive analysis to engage with pricing and passenger preferences. The airlines collect an extensive amount of traveler data and, by utilizing AI with analytics, airlines can predict trends or customize options for individual passengers. By predicting the correct compromise between what passengers are willing to pay for a desired flight time, what routes typically have more checked luggage, or the maximum amount a traveler is willing to pay for inflight beverages, the carrier ensures it is charging the maximum price per ticket or item.

THE USE OF BIOMETRICS IN TRAVEL WILL INCREASE THROUGHOUT THE TRAVEL JOURNEY, **INCLUDING EXPLOITING FACE AND FINGERPRINT DATA** THROUGH ALL PHASES OF A FLIGHT, FROM BOOKING TO LUGGAGE PICKUP.

The application of augmented reality aids in airports and on aircraft will likely be implemented at varying levels in the short and medium terms. Augmented reality advancements include seamless translation of languages between travelers or employees, a virtual visual overlay of aircraft safety briefings inside the aircraft, or directional overlays through an airport to each passenger.

**MEDIUM TERM**
Inflight phone use, including phone calls through 5G technology, has already been approved by some legislators, though it has yet to be utilized by commercial carriers. Limiting phone use to Wi-Fi connectivity during air travel is likely to be changed, allowing travelers to maintain continuity in the air.

Drones are already being used in several parts of the world for delivery of small packages for a nominal fee, with thousands of successful deliveries by drone in 2023. The method is likely to be widely utilized en masse within the medium term as several companies across the globe have been given the approval by respective CAAs to fly drones beyond the visual line of sight (BVLOS). BVLOS approvals will allow drones to fly much greater distances without the operator being required to visually see the drone, opening opportunities to deliver packages across cities and to remote areas.

**LONG TERM**
Several countries across the globe are focused on developing legislation and workable polices for the integration of highly automated, crewed, and uncrewed electric vehicles for commercial passenger travel. Many companies are aiming for the safe implementation of these AAM aircraft within the decade. Airlines are also offering support through investing in the vehicles, such as electrical Vertical Takeoff and Landing (eVTOL) vehicles with the anticipation that passengers will utilize these air taxis to fly to and from international airports and capitalize on travelers within certain proximity to airports.

Automation assisting humans in increased capacities will likely be utilized in the medium-to-long term. Automation is already used in commercial aviation, though increased capabilities such as the ability to taxi or communicate over the radio to air traffic control (ATC), and unmanned luggage and assistance vehicles in airports are already being developed and tested by major manufacturers.

### CONCLUSION

**Aviation developments are certain to change the industry; the pace at which these changes come, and the implementation stages across locations and carriers may differ, but how travelers and businesses respond will most certainly impact the continuity and success of operations in the coming year and beyond.**

KEY RISK TRENDS

# CYBERSECURITY

## Cybersecurity Landscape 2024: Navigating Cyberthreats in the Age of Artificial Intelligence

Artificial Intelligence (AI) stole the limelight in 2023, and it will continue to shape the cybersecurity environment in 2024, but more conventional cyberthreats such as ransomware, state-sponsored attacks, and supply chain issues will persist, causing a headache for cybersecurity professionals and business leaders.

### KEY JUDGMENTS

- Ransomware continues to evolve as threat actors perfect their tactics.
- As AI reshapes the landscape, cybersecurity reaps rewards and faces challenges.
- Geopolitics remains a driving force behind cyberattacks.
- Supply chain under pressure to bolster cybersecurity.

### AI PRESENTS OPPORTUNITIES AND CHALLENGES TO CYBERSECURITY

Integration of AI into business processes has seen rapid progress over the last decade. Yet it was not until the introduction of Open AI's Chat GPT in late 2022 that this fascinating technology caught public attention and opened a new chapter in the wider use of machine learning. While AI can bring enormous benefits to cybersecurity with its capabilities in predicting, monitoring, and countering cyberthreats with exceptional efficiency, it is also rapidly becoming a powerful tool in the hands of cyber criminals willing to use it to orchestrate more sophisticated cyberattacks.

By sifting through vast datasets, AI algorithms can uncover anomalous patterns indicative of a cyberattack and automate routine security tasks, freeing up human resources for more strategic, complex decision-making.

On the other hand, the weaponization of AI continues to pose a challenge to cybersecurity practitioners. Malevolent actors are likely to leverage AI to engineer more evasive malware, orchestrate large-scale, automated attacks, and use deepfakes—video or sound recordings that replace an individual's face or voice in a way that appears real—and synthetic media to conduct social engineering and false impersonation attacks or misinformation campaigns.

Rapid integration of this new and relatively untested technology in business processes also raises concerns about privacy and bias. AI systems require access to vast swathes of data and complex algorithms to function. Without careful selection and analysis of data to avoid garbage-in, garbage-out scenarios, since the quality of data input determines the quality of data output, there is a real concern that the indiscriminate use of AI might create more problems than it was initially meant to resolve.

### RANSOMWARE CONTINUES TO EVOLVE AS THREAT ACTORS PERFECT THEIR TACTICS

Ransomware remains a major cybersecurity threat, with 2023 becoming another record year witnessing a substantial increase in the number of ransomware victims and amounts paid globally. Over half of known ransomware attacks targeted organizations in the US, with smaller- to medium-sized companies being the preferred target. On a positive note, organizations are becoming more aware of ransomware threats and are actively working towards expanding their cybersecurity budgets and integrating cybersecurity into their executive structures.

2024 is likely to see the continuation of these trends and the sophistication of ransomware attacks, with the proliferation of ransomware as a service (RAAS). RAAS platforms provide attackers without the necessary technical knowledge or skills with the required software and the infrastructure to launch campaigns, therefore lowering the entry barrier for potential cybercriminals. In addition, triple extortion is becoming more widespread, with threat actors not only encrypting and exfiltrating the victim's data but using the stolen personal information to put additional pressure on victims to pay the ransom, or to conduct further social engineering attacks.

INTEGRATION OF AI INTO BUSINESS PROCESSES HAS SEEN **RAPID PROGRESS** OVER THE LAST DECADE.

### GEOPOLITICS REMAINS A DRIVING FORCE BEHIND CYBERATTACKS

Several geopolitically motivated cyberattacks took place in 2023, and 2024 is likely to reconfirm this trend. Russian cyber campaigns against targets in Ukraine and the West caught the most public attention, along with other well-documented state-sponsored and hacktivist campaigns, including the most recent Israeli-Palestinian conflict, Indian hacktivist attacks against Canada's government website, and Iranian hackers' attack against Israeli transport infrastructure.

While the Ukrainian-Russian conflict will remain in public focus in 2024, other geopolitical developments might take an equally important place on the digital agenda. These could include the Israel-Palestine conflict, which rapidly became a global digital event following Hamas' surprise attack on Israel in early October. The longstanding contest between China and the US equally brings more challenges on the cyber front, not least with the ongoing Chinese state-sponsored attempts to either undermine the US and their allies' defense and critical infrastructure or gain vital trade and industrial secrets to close the technological gap created by the US sanctions on semiconductor technology.

### SUPPLY CHAIN UNDER PRESSURE TO BOLSTER CYBERSECURITY

Supply chain has been cybersecurity's Achilles heel for several years, including several devastating cyberattacks, such as the SolarWinds in 2020, the Kaseya in 2021, and more recently the MOVEit supply chain attack in June 2023, affecting hundreds of organizations. The technology research and consultancy firm Gartner forecasts that 45 percent of organizations globally are likely to become victims of an attack on their software supply chain by 2025, with an estimated cost of more than USD 80 billion. The main explanation behind this bleak forecast lies in the increasing digitalization of commercial activities and the continuous sophistication of supply chain cyberattacks, supported by the proliferation of AI and machine learning techniques used by cyber attackers. The problem is further amplified by the lack of awareness and training, as well as vigorous auditing and compliance processes to ensure that robust cybersecurity is implemented at every stage of the organization's supply chain. Addressing this complex issue will require a long-term proactive approach by business leaders involving both innovative organizational and technological solutions.

### CONCLUSION

**The year ahead is likely to see further integration of AI into business processes, boosting productivity and cybersecurity, but also bringing new challenges, including more sophisticated cyberattacks, forcing businesses to quickly adapt to these new realities.**

# HEALTH

## Impact of Climate Change and Evolving Healthcare Resilience

Climate change will continue to have health repercussions through the coming year, particularly in those locations with fragile healthcare systems. In 2023, developments associated with climate change led to several events impacting the health of individuals across the globe, with a surge in disease outbreaks and destruction of healthcare infrastructure, which negatively impacted access to healthcare service delivery. In countries with advanced healthcare systems there is the emerging threat from the effects of rising temperatures and altered rainfall patterns in the spread of "vector-borne" infections. Recent years have highlighted the evolution of health threats and solutions on a global scale.

### IMPACT OF CLIMATE CHANGE ON HEALTH

Climate change will significantly impact public health, leading to health issues like heat-related illnesses, vector-borne diseases, and mental health challenges. It will also affect individual health and access to quality healthcare services.

These impacts are already evident, with more frequent and severe extreme weather events, such as floods, with mass displacement of vulnerable populations increasing the risk of emerging diseases and disrupting healthcare services. By 2050, rising temperatures are projected to substantially raise annual malaria-related deaths by between 21,000 and 350,000.

The surge of vector-borne diseases like dengue fever and malaria continues around the world, in both endemic and non-endemic areas. Over the last few years, countries in Asia, Europe, and the Americas have reported a significant rise in vector-borne outbreaks. Notable outbreaks have been reported in Bangladesh and Italy. Locally acquired disease incidence with no history of travel to an endemic country has risen in Italy with the last outbreak reported in 2020. More than three million dengue fever cases have been reported in the Americas so far this year. That means 2023 already has the second-highest annual incidence of the disease since 1980.

### KEY JUDGMENTS

- Extreme weather events will contribute to an increase in emergent disease outbreaks. These events can disrupt healthcare services, exacerbating the challenge of responding effectively to the health needs of affected populations and highlighting the importance of resilient healthcare systems.
- Healthcare professionals need to be increasingly aware of diseases such as dengue fever, malaria, and West Nile virus and their impact on patient health needs.
- To address climate-related health challenges, a holistic approach that includes medical advancements, improved healthcare access, and sanitation initiatives will be essential for reducing disease burdens and maintaining healthcare infrastructure.

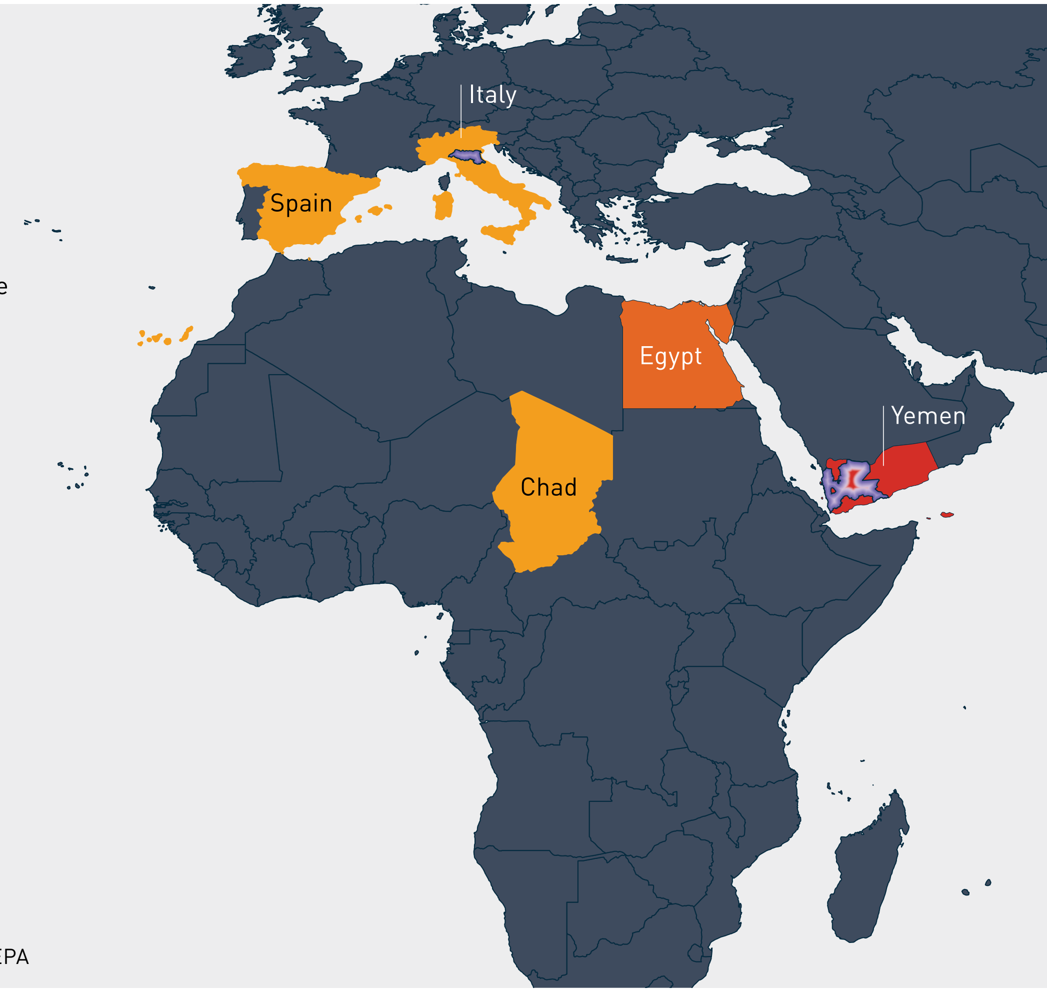
Four US states have reported a locally transmitted malaria infection in 2023. The cumulative total of cases of locally acquired malaria in the US this year is now 10. However, the most common mosquito-linked blood-borne disease in the US is caused by the West Nile virus, first identified in New York in 1999 but now widespread across many states.

The links between climate change and the spread of highly pathogenic avian influenza H5N1, or "bird flu," are as yet mostly unexplored but there is no doubt that changes in migratory patterns of wild birds have contributed to the widespread distribution of the pathogen. Looking forward, this will increasingly raise questions around how the resulting altered relationships between flocks of wild birds, domestic supplies of poultry, and the interaction with human populations may influence the potential for a deadly human-adapted avian influenza pandemic of unknown magnitude.

Vulnerable populations, particularly in impoverished communities, will face the brunt of these consequences. Roughly 3.6 billion people live in areas highly susceptible to climate change, compromising various social

**Outbreaks of Vector-Borne Diseases Across Non-Endemic Countries 2023**

This map showcases the outbreak of dengue fever and malaria; as well as the relative caseloads in non-endemic countries in 2023. It also highlights where major flooding caused by climate change has occurred, contributing to the non-endemic outbreaks.




**Vector-Borne Disease Caseload**

- 100 or Less Cases
- 101–1,000 Cases
- 1,001 or More Cases
- Areas Affected by Major Flooding

Credit: Esri, FAO,NOAA,USGS,HERE,Garmin,EPA

determinants of health. Low-income and low-middle-income countries are disproportionately affected, with severe weather events causing significant harm, particularly in regions with poor sanitation and healthcare infrastructure.

Cholera outbreaks have become larger and more widespread in recent years; this trend is expected to continue, challenging disease control efforts. Extreme weather events and climate stressors will also compromise water and soil safety, increasing the risk of water-, vector-, and food-borne diseases. These, in turn, will reduce agricultural productivity, biodiversity, and food stability, contributing to food crises and malnutrition.

### HEALTHCARE RESILIENCE

Healthcare systems will come under greater strain in the medium-to-longer-term. The COVID-19 pandemic exposed vulnerabilities in healthcare systems, even in well-resourced countries, as they struggled to cope with rising hospitalizations, shortages of protective resources, and increased disease incidence and deaths. The pandemic emphasized the need for healthcare systems to be resilient, capable of adapting and performing better in the face of unforeseen disruptions like disease outbreaks, climatic events, or armed conflict.

High levels of health emergency management have been reported in both high-income countries like Japan and low-middle-income countries like Cuba and Tuvalu, demonstrating that capacities for effective preparedness go beyond national health expenditures and ample health service provision and workforces.

Vulnerabilities at the country level, such as unequal access to quality care, individual behavior, disease profiles, environmental conditions like flooding, and structural inequities, will put pressure on healthcare systems, particularly those countries with low levels of health emergency management. To prevent future hazardous events from impacting healthcare systems, precautionary response capacities will be essential. Such capacities include investing in medical products, vaccines, and medical technology, robust surveillance systems for detecting emerging hazards, agile emergency response, and efficient healthcare system recovery following a public health emergency.

## MEDICAL ADVANCEMENTS WILL TACKLE CLIMATE-RELATED HEALTH CHALLENGES

Medical advancements, improved access to healthcare, and effective sanitation initiatives could significantly reduce the burden of diseases driven by climate change in the longer-term. A holistic approach by multisectoral national governments will mitigate the effects of climate change on disease outbreaks and healthcare infrastructure:

**TELEHEALTH AND VIRTUAL-CARE MODELS**
As with the COVID-19 pandemic, virtual-care models and telehealth services will be a primary manner to treat patients with mild illness while keeping them safe from contagion. Integrating these capabilities into healthcare systems will offer numerous advantages, including improving access to healthcare, minimizing barriers to healthcare access, reducing travel time and costs, enabling patients to receive medical consultations and follow-up care remotely, and enhancing the continuity of care. Moreover, it will enable early intervention and preventive care, reducing hospital admissions and healthcare costs. Telehealth will also directly reduce the emission of environmentally and health damaging pollutants by limiting in-person visits to healthcare facilities by various transportation avenues like motor vehicles.

**ARTIFICIAL INTELLIGENCE (AI) FOR HEALTH**
Improved diagnostic accuracy, personalized treatment recommendations, enhanced patient care through remote monitoring, efficient administrative task automation, and predictive analytics for disease prevention and resource allocation are just a few of the many advantages that integrating AI into healthcare will bring. AI can highlight vulnerable locations and healthcare infrastructures during an extreme event like flooding using projected rainfall estimates, especially in countries with limited resources to protect populations against these events. These climate-driven public health models will enable predictive maintenance that can avert healthcare service failures, reallocate resources in emergent disease outbreaks, and improve maps to identify at-risk individuals.

BY 2050, RISING TEMPERATURES ARE PROJECTED TO SUBSTANTIALLY RAISE ANNUAL **MALARIA-RELATED DEATHS BY BETWEEN 21,000 AND 350,000.**

## CONCLUSION

**Looking ahead, climate change and associated extreme weather events will have profound and wide-ranging effects on public health in 2024, which will likely represent a disproportionate impact on vulnerable populations, and underscore the need for urgent action to adapt and mitigate potential consequences. Countries with resilient healthcare systems in 2024 will have established early warning systems that can predict potential severe events like those driven by climate change. However, even well-established healthcare systems will need to be vigilant of the "globalization" of infectious diseases and the potential for another devastating pandemic.**

# ARTIFICIAL INTELLIGENCE

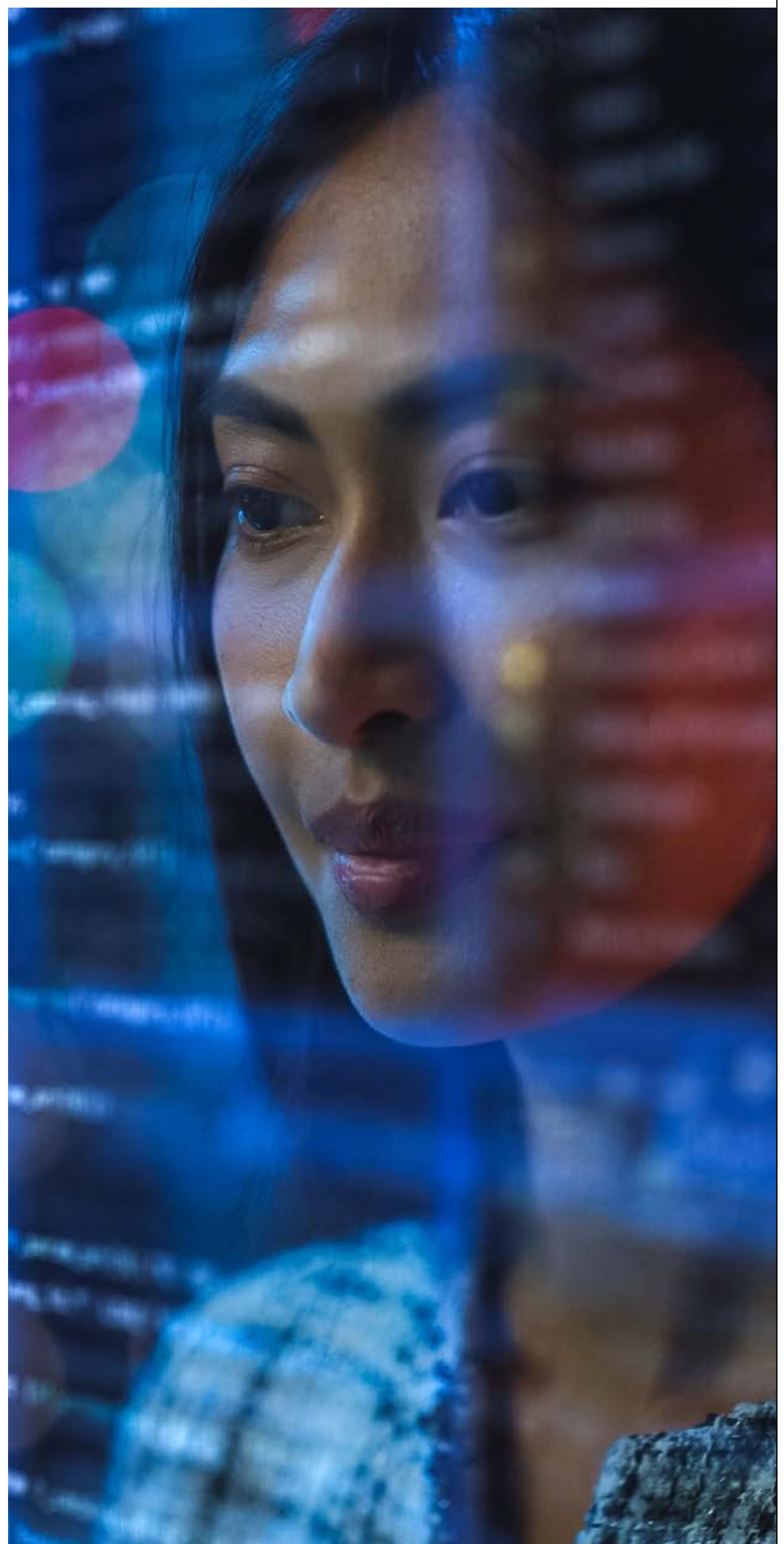
## The Impact of AI on Security: Misinformation, Disinformation, and Lack of Explainability

Artificial intelligence (AI) is a rapidly developing technology with a wide range of potential applications. However, over the longer-term, AI will increase the potential uses for malicious purposes, such as spreading misinformation and disinformation campaigns and exploiting the lack of explainability of common generative AI algorithms.

### MISINFORMATION AND DISINFORMATION

State and non-state actors are projected to increasingly harness AI's capabilities to craft and disseminate misinformation and disinformation with unparalleled efficiency and scope. Over the next several years, this threat will intensify. AI-driven technologies can fabricate fake news articles, videos, and social media posts that are virtually indiscernible from authentic content. Furthermore, automated bot networks and social media accounts can propagate such deceptive content exponentially to influence vast audiences. While the implications of these technologies are evident, it is imperative to approach this forecast with a balanced perspective. Some argue that the concerns might be exaggerated, emphasizing the countermeasures being developed. Nevertheless, as AI continues to evolve, so does its potential impact on information dissemination, making it crucial to stay vigilant and informed.

Misinformation and disinformation campaigns, whether human or AI-driven, could potentially have a devastating impact on security and pose a threat to democracy. In July 2023, University of Zurich researchers published a paper that found that AI-generated news articles were more likely to be shared on social media than human-written articles; people were also more likely to believe AI-generated articles, even when labeled as fake. Against this backdrop, the use of AI to spread misinformation about candidates, policies, and political issues can undermine public trust in institutions and lead to violence and instability.



### KEY JUDGMENTS

- AI to create and spread misinformation and disinformation at an unprecedented scale and speed potentially undermining public trust and social stability.
- The lack of explainability of certain AI algorithms can pose a security risk, as it can be challenging to understand and rectify biased or malicious behavior.
- The development and implementation of ethical guidelines for AI, and investment in research on AI security, and public education will be necessary.

Additionally, misinformation and disinformation campaigns can also target specific individuals or groups. For example, hackers could use AI to create personalized phishing emails that are more likely to be successful or generate fake social media profiles to build relationships with people and exploit them.

The rising influence of AI-driven content naturally prompts the question: "Will this trend persist, or will society become more discerning over time?" As we peer into the future, the key to tackling this challenge may lie in the very technology that is causing it. AI has the potential to be both the problem and the solution. Just as AI systems can generate fake news or misinformation, new AI tools on the horizon will assist humans in discerning fact from fiction. We are witnessing the onset of an AI "arms race," where one side uses AI to deceive while the other leverages it to detect and debunk.

### LACK OF EXPLAINABILITY

Another security risk posed by AI is the lack of explainability of certain AI algorithms. In AI terminology, "explainability" pertains to the degree to which a human can understand and interpret the decision-making process of a machine learning algorithm. Ideally, an "explainable" AI would allow users to see the sequence of decisions and factors the algorithm considered to reach its final output. This transparency would lead to increased trust in the system's results. However, many AI algorithms, particularly deep learning models, are intricate and non-transparent, often labeled as a "black box." This lack of visibility into the algorithm's internal workings makes it nearly impossible to discern how and why these models make specific choices, making detecting and rectifying biased or malicious behaviors challenging.

For example, an AI algorithm that is used to make hiring decisions may be biased against certain groups of people, even if the algorithm was not explicitly programmed to be biased. This bias could lead to rejection of qualified candidates.

The lack of explainability of AI algorithms also makes securing them difficult. If an attacker can understand how an AI algorithm works, they may be able to exploit its vulnerabilities to launch attacks. An attacker could create a fake input that would cause an AI algorithm to make a wrong decision or modify an AI algorithm to make it biased or malicious.

Some might argue that these transparency issues are merely teething problems with nascent technology. As the field advances and best practices are established, the concerns about lack of explainability and the presence of biases could potentially diminish, but this largely hinges on the consistent demonstration that the "black box" results are becoming more accurate. One effective approach to reduce these biases is by meticulously curating the data from which the deep learning models learn, ensuring it is representative and free of inherent prejudices. Nonetheless, continuous efforts are needed to ensure that AI remains transparent and accountable.

### CONCLUSION

**As organizations undertake the necessary steps to mitigate the security risks posed by AI, its benefits will grow in the medium-to-long term. At the same time, the potential for its detrimental use diminishes. However, the security risks posed by AI are not static. As AI technology evolves, new risks will arise. Thus, a collective call to action becomes evident; we must craft ethical guidelines, pioneer AI security research, and empower the public with knowledge. In the age of AI, vigilance, adaptation, and education are our strongest allies.**

## Expert Insights

When it comes to risk management, technology has become a powerful enabler. It facilitates a web of interconnectivity, providing security departments with unprecedented threat intelligence coverage and improved interaction with people and assets. From AI-supported analyst teams to advanced platforms and mobile technology, along with diverse communication channels, the multi-dimensional, real-time data allows for enhanced coverage and economies of scale. In this series of interviews, Crisis24 subject matter experts discuss the ways in which technology can enhance the practice of risk management in unprecedented ways.

**Michael Gilbert**
Vice President,
Product Management

Mike is responsible for the vision and product strategy for the TopoONE by Crisis24 critical event management platform. Additionally, Mike oversees product releases, product marketing, and sales engagement for Crisis24. Mike holds a Bachelor of Science in computer science from the Pennsylvania State University. He has 32 years of experience in enterprise software development and design.

**Cathy Gill**
Vice President,
Product Management

Cathy leads Crisis24's product strategy and oversees teams in product management and UX. She guides product development, go-to-market efforts, and full lifecycle management for Crisis24's integrated risk management solutions. With a bachelor's degree from the University of Cape Town, Cathy brings over 17 years of experience in the risk management industry, spanning intelligence, operations, customer service, and technology.

**Thomas Lee**
Chief Technology Officer

Thomas is responsible for technology innovation within Crisis24, including the team responsible for the TopoONE by Crisis24 product offering. Thomas has decades of experience building large-scale SaaS platforms and operating global technology teams.

**Mark Niblett**
Senior Vice President, Global Operations and Chief Security Officer

Mark leads a team responsible for global security and medical operations, ensuring the delivery of integrated support to clients worldwide. With decades of experience in multi-site international and high-risk operations, Mark's career began in the UK armed forces and has since focused on risk and security management.

**Martin Williamson**
Senior Product Manager

Martin oversees the development of Crisis24 mobile products, primarily mobile apps with a focus on end-user experience. He has over 10 years of experience in the risk management and mobile apps industry. Martin is proficient in programming and holds a bachelor's degree in engineering.



## How Mobile Technology is Redefining Duty of Care

Mobile technology has made it possible to reach people almost instantly, no matter where they are. Whether traveling abroad, working from home, or at an office, mobile technology has transformed the way duty of care is implemented.

Duty of care has become an integral and expected responsibility of organizations, with severe legal, reputational, and financial consequences if neglected. Whether employees travel or work locally, the specter of critical events, ranging from natural hazards to security incidents, is an ever-present concern. If a security manager has personnel in a location where an active shooter incident occurs, they must implement a wide array of protocols and decision-making. One of the first and most immediate actions is to determine who may be impacted and to check on their safety. Effective risk management procedures and fast, accurate intelligence are more important than ever, playing a crucial role in safeguarding personnel and operations and preempting adverse outcomes.

"To adapt and protect employees, organizations need a comprehensive risk management tool that empowers personnel across the organization with the intelligence and knowledge they need to stay safe," says Cathy Gill, vice president of Product Management at Crisis24.

Mobile technology has played a key role in this regard. The extensive use of smart devices, advancements in technology, and the expansion of global coverage mean that people can stay connected almost anywhere. Users can carry a mini risk management platform with them at all times. With mobile devices, employees are aware of risks, informed of developing threats, can communicate their status quickly and easily, and can reach out for assistance.

"Mobile technology provides various benefits in risk management, such as always-on awareness, on-hand threat intelligence, and immediate communications and distress signaling through location sharing," Gill says.

Crisis24 Horizon Mobile best uses the strengths of mobile technology to safeguard personnel. It provides real-time updates and location-based warnings, made possible by positioning data, and keeps the user informed of events in their direct vicinity. Even if itineraries change at short notice, the threat intelligence users receive will always be relevant to their location. Apart from developing threats, the platform also informs users about established threats, such as if they are approaching a higher threat location, for example a neighborhood with elevated crime levels. While written risk assessments can be accessed anytime on the app, incorporating this intelligence into its functionality and into the push notifications the user receives provides a tangible and tactical benefit.

Mobile technology in the risk management space has been an inflection point for how organizations can approach their duty of care responsibilities. Critical components in providing a duty of care to personnel are knowing what threats are occurring, where your people are, and who may be at risk. Through mobile technology, an administrator or security manager can get accurate geographic locations of their people, increasing the accuracy of their threat exposure considerations. This can also be done without compromising privacy by only sharing a last-known location and not providing a breadcrumb-style trail.

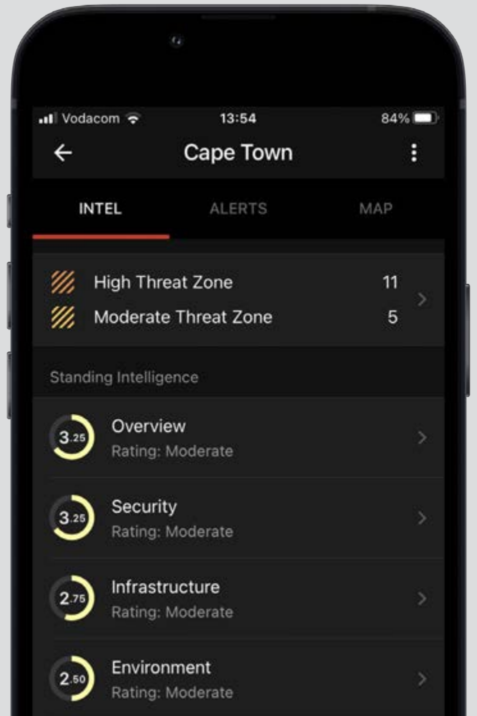
When an incident occurs, communicating and confirming safety or coordinating a response is essential. Crisis24 Horizon Mobile enables users to receive and reply to messages within the app. At the same time, the device itself can also handle other Horizon communication channels, such as email, SMS, and text-to-voice calls. Communications can also flow the other way, either through a check-in notification for the user to confirm they are ok or via a crisis signal when someone needs immediate assistance. "Where mobile technology has revolutionized a 'crisis signal' is that positioning data and other information can now be shared simultaneously, which can be critical in emergency situations," says Martin Williamson, senior product manager at Crisis24.

However, the success of any risk management program depends on its adoption and buy-in across the organization. Mobile technology simplifies this process. Apps are ubiquitous nowadays; they are easily downloadable and widely used. As a fully native iOS and Android application, Crisis24 Horizon Mobile seamlessly integrates with native features of the operating system. This includes applying the accessibility configurations set on the device to the user's experience within Horizon Mobile. With the app supported in multiple languages, this further reduces the barrier to user engagement, making it more accessible to all personnel. The app's design, intuitive navigation, and functionality provide a seamless user experience, boosting its adoption and use.

> "Mobile technology provides various benefits in risk management, such as always-on awareness, on-hand threat intelligence, and immediate communications and distress signaling through location sharing."
>
> **Cathy Gill**
> Vice President, Product Management
> Crisis24

## CONCLUSION

**With risk management now in people's hands, mobile technology has advanced capabilities and fosters a culture of shared awareness and responsibility throughout organizations. It is undeniable that further developments in the mobile technology sector will open more innovative ways to protect your organization and your personnel.**






# Harnessing Technology for Resilient Crisis Communication

Despite living in an era marked by unprecedented digital connectivity, the surge in physical security threats has become an undeniable reality. From the rise of geopolitical tensions and mass demonstrations to natural disasters and unforeseen day-to-day safety crises, the need for robust communication systems within organizations across the globe has never been more critical.

The lack of key communication infrastructure, as highlighted in the ongoing conflict in Gaza, showcases how connectivity plays a pivotal role for civilians, governments, and organizations, serving as a lifeline for real-time updates, emergency alerts, and coordination of response efforts amid evolving and often volatile situations. Technology stands as a linchpin in ensuring that communication lines remain open and efficient during such moments, with a focus on rapid response and coordinated efforts.

"Technology is a critical enabler for maintaining open and efficient communication lines during critical incidents or crisis situations within an organization," says Thomas Lee, chief technology officer at Crisis24. "Information is disseminated quickly, stakeholders are kept informed, and response efforts are coordinated effectively, ultimately improving the organization's ability to respond to and recover from crises."

Reduced awareness and response times can be the difference between keeping a stalled shipment of refrigerated vaccines at the proper temperature or letting them spoil.

"The ability to communicate out over multiple communication channels very quickly is extremely important," Lee adds.

Advanced communication technologies also significantly contribute to effective crisis management and direction. With detailed, real-time information, security teams can focus on the right people at the right time. For senior management and leadership teams, technology provides a summary view of ongoing crises, enabling a more strategic approach instead of often time-consuming status reporting which can impact key decision-making. The advancement of modern methods of communication has made once laborious processes seemingly instant, not only benefitting organizations and their employees globally, but also the wider public.

When selecting solutions for managing mass communication during crises, two key attributes are crucial. The first is a breadth of communication modalities,

including those beyond traditional SMS messages, such as email and team-based messaging tools.

"It's essential to have multiple communication channels—rather than just relying on email or SMS—to avoid a single point of failure," says Michael Gilbert, VP and head of Product Management at Crisis24. "Most organizations are incorporating group messaging channels such as Slack and Microsoft Teams along with relatively new technologies such as WhatsApp, Signal, Telegram, and WeChat."

The second attribute is scale, ensuring that the chosen technology is built to handle the demands of the most anticipated threats.

"It's not just about sending an email. It's about sending an email, a text message or a communication over Slack or Teams. And can I do those things times the 10,000 people potentially impacted in this area very quickly?" explains Lee.

Both Gilbert and Lee have seen organizations struggle with speed, breadth of modalities, and scale. At Crisis24, they've also seen how technological developments and innovations revolutionize the efficiency and effectiveness of communication strategies during critical incidents and crises.

For example, TopoONE by Crisis24, a leading solution in critical event management, has demonstrated significant improvements in communication and decision-making processes for organizations, including its provider, Crisis24.

"TopoONE's ability to bring the location of all of their assets (including employees, office locations, and travelers) into one view and then overlay and automate the threat assessment process is a game changer," says Gilbert.

> "It's essential to have multiple communication channels—rather than just relying on email or SMS—to avoid a single point of failure."
>
> **Michael Gilbert**
> Vice President, Product Management
> Crisis24

Within seconds of receiving an alert, the TopoONE system can proactively assess its severity and proximity to impacted parties. Based on an organization's configured standard operating procedures, end users are automatically notified of an issue and prompted to respond, indicating whether they are safe or need assistance.

Ultimately, organizations should seek mass communication technologies that prioritize speed and offer the right mix of resiliency, multiple channels, and scalability to fit their needs.

## CONCLUSION

**The increased nature of global geopolitical events also highlights the importance of maintaining a robust yet also reliable mass communication service. Organizations should also integrate cloud-based solutions, which offer the ability to minimize the burden of infrastructure maintenance, alongside stringent cybersecurity practices.**



# Transforming Global Security: The Role of Technology in Empowering GOC Operations

The growing capabilities and benefits of technology have become pivotal in reshaping the landscape of security operations, particularly within Global Operations Centers (GOCs). At the forefront of this transformation are cutting-edge platforms leveraging Software as a Service (SaaS) and Artificial Intelligence (AI) to enhance operational efficiency and ensure rapid, informed decision-making.

GOCs operate as indispensable nerve centers for monitoring and responding to security threats worldwide. The integration of advanced technology has become the cornerstone of GOCs, transforming them into highly responsive hubs that operate around the clock. Technology is also a force multiplier giving a GOC the tools to monitor and oversee thousands of people, trips, and locations worldwide, regardless of the size of the security team. The economies of scale made available by new technology are also very attractive cost considerations for organizations.

Crisis24 Senior Vice President and Chief Security Officer Mark Niblett understands firsthand the importance of leading a technology-driven Global Operation Center. Having served in the UK armed forces and as head of security for multiple global organizations, Niblett is responsible for Crisis24 GOCs, supporting the safety and well-being of corporate, NGO, and academic clients around the world, as well as ensuring the safety of Crisis24's own 3,000 employees.

"The right technology in the GOC environment gives security leaders a clear view of their risk landscape, enabling them to funnel, refine, and screen through multiple data sources filtering the noise and ensuring they aren't missing critical information that may impact their business operations," says Niblett. "In crisis scenarios, access to this information plays a critical role in decision-making, with protocols guiding the steps that organizations need to take. Reducing the time to awareness and then response is the most important thing in a crisis."

Advanced platforms such as TopoONE by Crisis24 focus on securing specific individuals, events, and locations, facilitating rapid communication with those at risk.

Established responses and protocol initiatives can also be automated, enabling the GOC team to be more focused. This macro-level approach aligns with the broader objective of enhancing the resilience and preparedness of GOCs against potential security threats. This is proven essential in emergency situations, where the ability to pinpoint and communicate with individuals is crucial for effective crisis management.

In addition to crisis communication, TopoONE's technology excels in consolidating and synthesizing disparate data points to create a comprehensive risk profile. "The platform is a single pane of glass solution, ensuring GOCs have a holistic understanding of potential risks to personnel and sites across various geographical locations," explains Niblett. By refining vast amounts of data, these technological advancements contribute to creating a more proactive and preemptive security posture within organizations.

## CONCLUSION

**As technology continues to advance, the future of GOCs is poised for further evolution. Critical Event Management platforms exemplify this progression, not only by automating data collection and analysis but also by enabling AI to create comprehensive response plans. This shift toward AI that understands context and makes strategic decisions promises to further revolutionize the efficiency and effectiveness of security operations on a global scale.**

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Crisis24 would like to thank our contributors, whose expertise gained from experience in both government and private sector intelligence agencies underpins our support capabilities to our clients, giving us unrivaled depth in the field.

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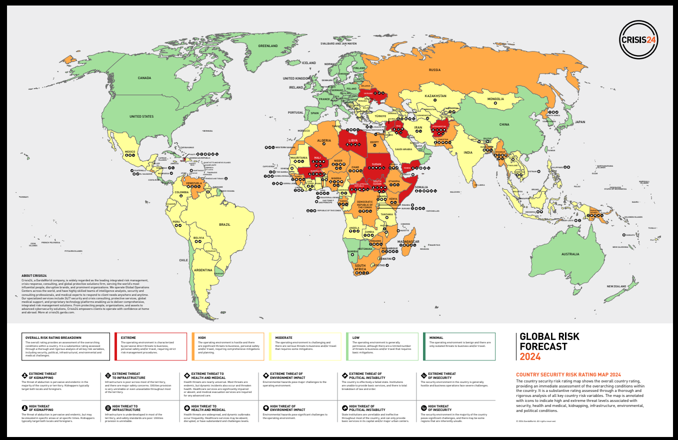
# Risk Assessment Ratings Maps

Crisis24's country-specific security and risk rating maps provide informed indicators of security conditions for a high-level understanding of a country's threat profile. With the assurance of extensive analytical coverage and pressure tested methodologies, Crisis24 continuously monitors the operating environment and updates threat ratings as conditions change. Each country is rated on a scale from 1–5 (minimal, low, moderate, high, or extreme) to indicate the threat level. The country security and risk ratings provide a clear picture of potential concerns and can help inform risk mitigation strategies.



Included in the 2024 Global Risk Forecast are eight risk assessment maps, consisting of an overall security and risk rating map, specialized category maps, and a master map that reflects the overall country rating with high and/or severe specialized threats specific to each country.

**DOWNLOAD MAPS**
**bit.ly/GRF-2024-Maps**

**To access these maps, please visit our digital version by scanning the QR code or typing the address into the browser.**

## About Crisis24

Crisis24, a GardaWorld company, is widely regarded as the leading integrated risk management, crisis response, consulting, and global protective solutions firm, serving the world's most influential people, disruptive brands, and prominent organizations. We operate Global Operations Centers across the world, and have highly skilled teams of intelligence analysts, security and consulting professionals, and medical experts to respond to client needs anywhere and anytime. Our specialized services include 24/7 security and crisis consulting, protective services, global medical support, and proprietary technology platforms enabling us to deliver comprehensive, integrated risk management solutions. From protecting people, organizations, and assets to advanced cybersecurity solutions, Crisis24 empowers clients to operate with confidence at home and abroad.

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