

Mid-Year Forecast



CRS Security & Risk Forecast Report (H2 2025)

Contact

+44 (0) 203 488 9208
124 City Road, London,
EC1V 2NX,

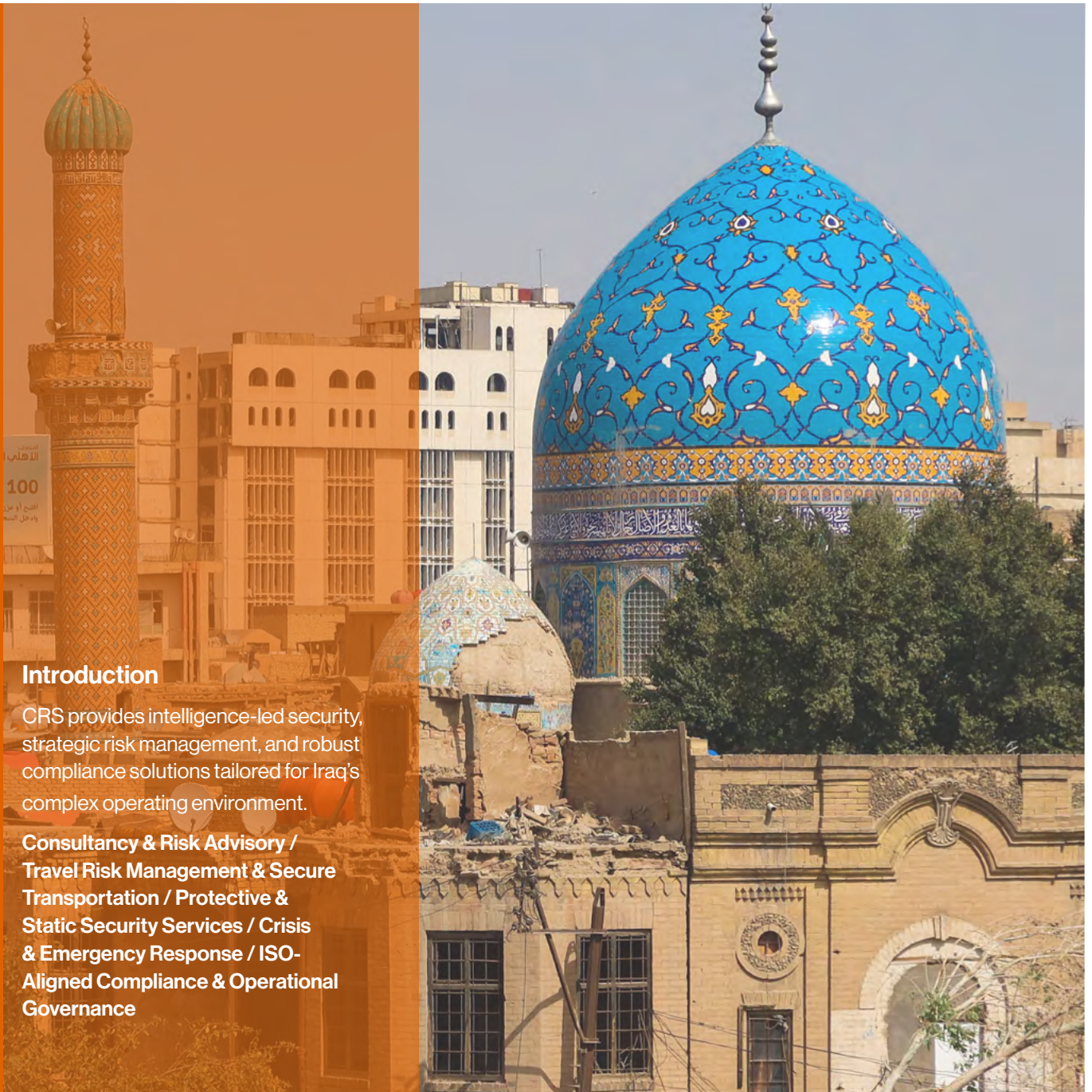
Website

www.cambrairisk.com
Info@cambrairisk.com

Introduction

CRS provides intelligence-led security, strategic risk management, and robust compliance solutions tailored for Iraq's complex operating environment.

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H2 2025



CRS Security & Risk Forecast Report

Cambrai Risk Solutions' (CRS) Security & Risk Forecast (H2 2025) provides intelligence-driven insights, precise threat assessments, and clear operational guidance tailored for organisations navigating complex security environments in the Middle East and North Africa (MENA).

This report synthesises rigorous analysis of geopolitical shifts, regional power dynamics, and emerging security trends, delivering structured risk assessments, actionable intelligence, and scenario-based forecasting. From evolving U.S.–China tensions to the nuanced regional

implications of Russian strategic pivots and Iranian diplomatic manoeuvring, our analysis anticipates the operational impacts of macro-level changes with precision.

CRS leverages decades of operational experience, a network of trusted local intelligence, and rigorous compliance frameworks aligned with ISO standards to translate complex geopolitical events into clear operational realities. Our commitment is to provide organisations with not only foresight but practical, intelligence-led strategies that ensure compliance, mitigate risks, and safeguard

personnel, assets, and reputations in high-threat environments.

In this forecast, we outline the most likely and worst-case scenarios, providing clarity on key threats and opportunities that will shape operational landscapes through the second half of 2025. Designed for security managers, risk directors, and strategic planners, this report supports informed decision-making, robust risk management, and sustained operational integrity across your operations.

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Global & Regional Outlook

Geopolitical undercurrents in the Middle East and North Africa **will significantly shape security conditions through the remainder of 2025.**

Great-Power Rivalry:

- ▶ U.S.–China strategic competition, especially in technology, trade and military domains, continues to influence Gulf decision-making. Gulf states are deepening economic ties with China via infrastructure and 5G, while maintaining U.S. security partnerships. Supply chain and tech access risks remain **moderate**; **no direct confrontation expected.**
- ▶ Russia–NATO dynamics, driven by the protracted Ukraine conflict, limit Moscow’s capacity to sustain influence in Syria. The fall of the Assad regime in late 2024 **pushed Russian focus toward Libya to maintain a Mediterranean foothold.** NATO member Türkiye pursues unilateral agendas, including incursions in Iraq and Syria, adding complexity to the regional security environment.



U.S.–China rivalry shapes Gulf economic and security strategies, intensifying regional complexities without immediate risk of direct conflict. Russia’s capacity in Syria diminishes due to Ukraine, shifting its focus to Libya, while Türkiye’s unilateral actions in Iraq and Syria further complicate regional security dynamics.

Iran’s Position:

- ▶ U.S. airstrikes, conducted June 22, 2025 (“Operation Midnight Hammer”), targeted Iran’s Fordo, Natanz and Isfahan nuclear facilities. U.S. officials assert “severely degraded” capabilities; independent assessments suggest a rollback measured in months rather than years
- ▶ Iran responded with missile strikes on Al Udeid Air Base in Qatar, followed by a U.S.–brokered ceasefire with Israel taking effect on June 23
- ▶ Tehran suspended cooperation with IAEA inspections, heightening nuclear opacity, **but concurrently, overt military escalation appears paused.**

CRS Forecast: Iran will likely maintain military restraint, pursue nuclear diplomacy, leverage proxy capabilities (Iraq, Syria, Yemen, Lebanon), and gauge responses under the ceasefire dynamics. Escalation triggers: enrichment limit breaches, proxy rocket attacks, further U.S. strikes or IAEA refusal.

Regional Power Dynamics:

- ▶ **Gulf Arab states (Saudi Arabia, UAE) remain on economic transformation trajectories**, capitalising on the 2023 Saudi–Iran détente brokered by China. **Public proxy violence has dropped**; underlying influence competition continues.
- ▶ **Türkiye remains proactive:** ACLED reports ~200 Turkish airstrikes in northern Iraq during May 2025, **reinforcing Ankara’s posture against Kurdish threats.**
- ▶ **Transnational jihadism:** **ISIS resurges at low intensity in Syria**, while **Iraq sees declining violence.** Approximately 2,500 ISIS operatives remain across Iraq and Syria. **Al-Qaeda affiliates in Yemen and North Africa persist as unpredictable threats.** Security vacuums could ignite rapid escalation.

Cross-Border & Transnational Threats:

- ▶ **Displacement flux:** Post-Assad return of 425,000 Syrians (Dec 2024–Jun 2025) **strains stabilisation efforts**; Libyan migrant transit continues. Sudden migratory surges in response to new conflict or crackdowns may affect Europe.
- ▶ **Climate-induced stress:** MENA is highly vulnerable to heat, drought and floods. Libya’s 2023 Derna floods exemplified environmental shocks triggering humanitarian crises, public unrest and weakened governance. In H2 2025, expect persistent heat waves, water scarcity and **potential protests in Iraq, Syria, Lebanon.**

Security & Risk Overlay Map (MENA, H2 2025)

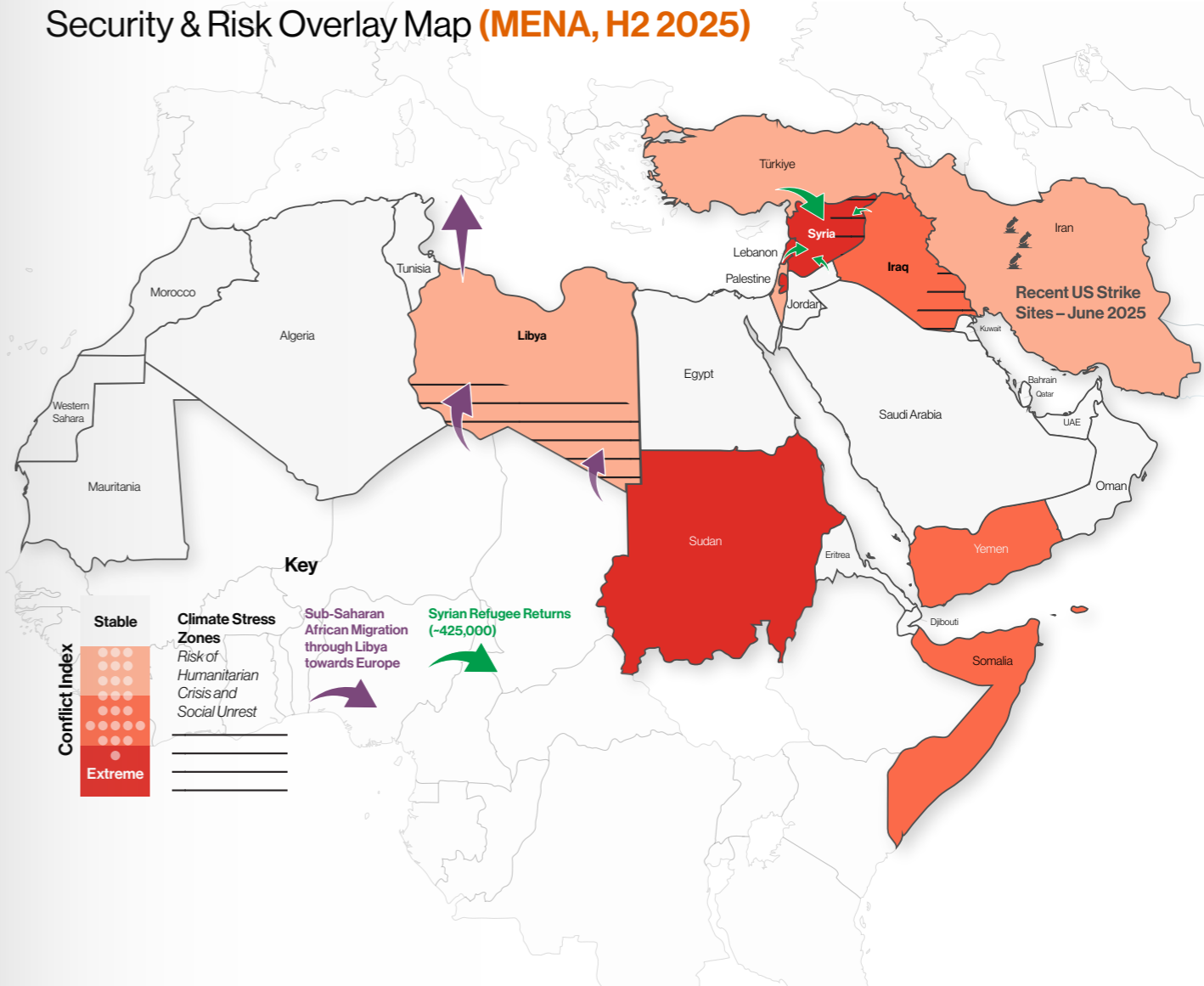


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Iraq Forecast

Security & Political Landscape

As Iraq moves into the second half of 2025, it maintains a delicate political stability under Prime Minister Mohammed Shia al-Sudani's government, established since late 2022. Al-Sudani's administration has successfully consolidated a coalition primarily consisting of Shi'ite parties, maintaining pragmatic working relations with Kurdish and Sunni factions. Consequently, Iraq is experiencing relative political calm, a marked improvement from the unrest experienced between 2019 and 2021. Nonetheless, fundamental challenges persist, notably deep-seated corruption, poor public services,

and unresolved disputes regarding the Kurdistan region's autonomy. Security conditions in Iraq have markedly improved, particularly concerning the threat from ISIS, whose operational capacity has diminished significantly. Effective counter-insurgency campaigns and waning militant recruitment have limited ISIS activity largely to isolated rural hideouts, especially in the provinces of Diyala, Kirkuk, and Salah al-Din. However, ISIS retains the ability to conduct sporadic deadly attacks, exploiting remote terrain and local conflicts.

Parallel to this, powerful Shi'a militias operating under the Popular Mobilisation Forces (PMF) — some closely aligned with Iran — remain a critical security factor. While largely contained, these militias have periodically targeted U.S. military convoys with rockets or drones and engaged in local power struggles. Turkish military operations targeting PKK militants in northern Iraq continue, with regular airstrikes causing collateral damage to local communities and infrastructure.

Key Threats & Risks (Top 5)

1. ISIS Insurgency Resurgence

Likelihood: **Possible** | Consequence: **High**

Despite significant degradation, ISIS remains capable of regrouping in northern Iraq. Potential for coordinated bombings or high-profile attacks that would severely impact investor confidence and pose significant safety risks.

Indicators: Increased ISIS propaganda, prison break attempts, uptick in IED and sniper attacks targeting remote military outposts.

2. Militia Violence & Iran-US Proxy Conflict

Likelihood: **Possible** | Consequence: **High**

Iran-backed militias within the PMF could escalate attacks in reaction to heightened U.S.-Iran tensions, risking casualties and prompting retaliatory U.S. military actions on Iraqi soil.

Indicators: Increased anti-U.S. militia rhetoric, unexplained mortar/drone incidents near coalition bases, intensified threats from militia commanders.

3. Political Crisis and Civil Unrest

Likelihood: **Possible** | Consequence: **Medium**

Possible political disputes, particularly around contentious elections or coalition fractures, could trigger widespread protests akin to the 2019 demonstrations, significantly disrupting business operations and infrastructure.

Indicators: Mobilisation on social media, vocal support for protests from influential clerics or activists, delays in government salary payments and public services causing popular anger.

4. Kurdish-Baghdad Tensions

Likelihood: **Unlikely** | Consequence: **Medium**

Disagreements over oil revenue and territorial control between Baghdad and the Kurdistan Regional Government (KRG) could escalate into armed confrontations, Adding pressure to an already unstable Oil & Gas operational structure.

Indicators: Escalation of rhetoric between Kurdish and central government officials, breakdown in revenue-sharing negotiations, local protests against federal authority in the Kurdish region.

5. Regional Conflict Spillover

Likelihood: **Unlikely** | Consequence: **High**

Iraq may become an unintended arena for broader regional conflicts involving U.S., Iran, or Israel. Such an event would pose a significant threat to foreign personnel and key infrastructure.

Indicators: Increased militia mobilisation, elevated air defense alerts, evacuation of diplomatic personnel or significant international diplomatic interventions.

Scenario Forecasting (July–Dec 2025)

Most Likely Scenario (Baseline): Continued Fragile Stability

The Iraqi government remains intact and security incidents stay at a relatively low simmer. ISIS activity stays low-level, occasional bombings in the north are contained by security forces, without major expansion. Militia threats against U.S. targets persist but mostly in the form of sporadic rocket harassment causing limited damage. The summer protest season sees only isolated demonstrations (e.g. over electricity outages), as the government pre-empts unrest with social support measures and a heavy security presence.

Operational Implications: Day-to-day business operations face manageable disruptions. Travel along key highways (e.g. Baghdad–Basra) is largely safe apart from normal criminal risks. However, companies in the north must exercise caution due to periodic Turkish strikes in border districts and the lingering ISIS presence.

Worst-Case Scenario: Militant Escalation and Political Breakdown

A convergence of crises, i.e an ISIS resurgence combined with a severe political rift in Baghdad, leads to a sharp deterioration in security. In this scenario, ISIS fighters exploit a security gap to overrun a remote town or conduct a mass-casualty bombing in Baghdad, reigniting sectarian tensions. Simultaneously, political chaos (for example, a contested election result in late 2025) brings protesters to the Green Zone and prompts some militia factions to break away, clashing with government forces.

Operational Implications: This would cause major interruptions: travel would be highly unsafe on many routes, international staff might be evacuated or restricted to secure compounds, and projects (especially in central/northern Iraq) could be suspended.

Iraq Security Outlook (H2 2025)

Iraq enters H2 2025 with fragile stability under PM al-Sudani's government. ISIS remains largely contained but retains potential for isolated attacks. Risks persist from Iran-aligned militias, political tensions, and Turkish cross-border operations. Vigilance and robust contingency planning remain essential for operational continuity.

- ### Trigger Warnings for Worst-Case Scenario

 - ▶ A sharp uptick in ISIS attack frequency (especially coordinated assaults or territorial grabs)
 - ▶ Public assassination of a high-profile figure (signaling political violence)
 - ▶ Mass mobilization by militia groups in Baghdad.
 - ▶ Mass mobilization or strategic repositioning by militia groups in Baghdad and major urban areas.
 - ▶ Breakdown in government coalition or significant election-related controversies.



Sector-Specific Implications:

In Iraq's complex risk environment, different industry sectors face distinct threat profiles:

- ▶ **Oil & Gas Sector:** Security in Iraq's energy sector is pivotal but perennially at risk. Oil and gas installations (fields, pipelines, refineries) could be targeted by ISIS sabotage in the north or by disgruntled militias in the south. For instance, insurgents have in the past bombed northern export pipelines and could do so again if they regain capacity. Additionally, political disputes can halt operations: the KRG's pipeline to Turkey remains shut since 2023 due to legal disputes, underscoring regulatory and contractual risks. Companies should expect strict government security at major sites but must plan for evacuations or shutdowns if conflict spikes. Also, community protests near fields (over jobs or revenue sharing) are a latent issue in Basra and Kirkuk provinces.
- ▶ **Construction & Infrastructure:** Firms in construction (including engineering projects, power, transport infrastructure) often operate in urban centers where they may face civil unrest or extortion threats. In the south, powerful tribes or militias sometimes make demands to allow projects; non-compliance can result in site invasions or kidnappings of staff. In Baghdad, large projects could be disrupted by curfews if political unrest occurs. That said, **if stability holds, H2 2025 may see growth in reconstruction projects**, especially if the government releases budget funds, a positive trend for the sector albeit still coupled with corruption and bureaucratic hurdles as risks.
- ▶ **NGOs & Humanitarian Agencies:** Aid organizations in Iraq enjoy improved access in many areas since ISIS's defeat, but they face heightened scrutiny and security risks. In federal Iraq, government intelligence monitors NGO activities closely, and any deterioration in U.S.-Iran relations might see Western NGOs accused of espionage by hardliners. In more volatile areas (northern governorates like Ninewa or Diyala), aid workers must contend with the remnants of ISIS – including the risk of IEDs on roads – and community tensions in areas recovering from war. **Kidnapping of NGO staff, while rarer now than during the ISIS heyday, remains a concern in high-risk zones.** Agencies also need contingency plans for sudden access restrictions if border closures or clashes occur (e.g. a flare-up on the Syria border could strand operations).
- ▶ **Government Sector (Diplomatic and Public Sector):** Government stakeholders, including foreign embassies, advisors, or contractors working with Iraqi ministries, are **high-profile targets in worst-case scenarios**. Militias have previously targeted U.S. and other diplomatic missions with rockets. Local government officials face assassination risks from ISIS (which often targets village leaders or police chiefs in rural areas). For clients in this sector, maintaining a low profile and robust protective intelligence is key. Additionally, frequent turnovers and policy shifts in Iraqi ministries pose operational risk for government-related projects – contracts can be stalled or cancelled due to political reshuffles or anti-corruption purges.



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(Iraq)

Strengthen Protective Security:

All clients should harden site security and journey management in Iraq. This includes using armored vehicles for road travel in medium/high risk areas, professional security drivers, and avoiding night movements outside secure areas. Oil & Gas facilities should review perimeter defenses and incident response drills for scenarios like armed attacks or explosive sabotage.

Intelligence Monitoring:

Implement a robust monitoring system (either in-house or via an intelligence provider) for real-time alerts on security developments. Early warning is crucial e.g., monitoring ISIS propaganda channels can flag emerging threats, and tracking political developments can foretell unrest. Sharing information with other companies and embassies can improve situational awareness.

Community Engagement Plans:

Particularly for construction and energy projects, build proactive community engagement. By addressing local grievances (through liaisons, community investment, local hiring where possible) clients can reduce the incentive for protests or sabotage. This also helps gain tribal buy-in for projects, which is often a critical factor for safety in Iraq's social landscape.

Contingency & Evacuation Planning:

Ensure that updated evacuation and hibernation plans are in place. Identify trigger conditions for relocating staff (e.g. a major attack in the operating area or government-imposed state of emergency). Conduct drills so all employees know emergency procedures. For example, expatriate staff in Baghdad should practice shelter-in-place for rocket attacks and have access to safe rooms, while those in remote sites should have a realistic evacuation plan if roads become impassable.

Cybersecurity Vigilance:

Although kinetic threats dominate, do not overlook cyber risks. Iran-linked hackers and others have targeted the Iraqi government and energy sector before. All organisations should use robust cybersecurity measures (firewalls, multi-factor authentication, offline data backups) to mitigate potential disruptive cyberattacks that could accompany physical conflicts. Increased phishing attempts or suspicious network activity should be treated as potential signs of geopolitical tension spilling into cyberspace.



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Syria Forecast

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Syria underwent a seismic transformation with the collapse of the Assad regime on 8 December 2024, when HTS and allied forces seized Damascus, forcing President Assad into exile. Subsequently, Ahmed al-Sharaa (a.k.a. Abu Mohammed al-Julani, HTS leader) emerged as the transitional president, forming a 23-member technocratic cabinet by 29 March 2025. Despite nominal consolidation, authority remains fragmented: HTS centers power in the north-west, the Kurdish-led SDF maintains autonomous control in the northeast, and

various militias, including Assad loyalists and tribal factions, control other zones. Security forces are overstretched and under-resourced, intensifying vulnerability to insurgent activity. Throughout H1 2025, ISIS significantly increased attacks in the eastern deserts and southern provinces of Suwayda, including bombings and village seizures. Pro-Assad loyalist groups, backed by Iran, have also executed guerrilla strikes, notably in Hama and along the Alawite coast. Meanwhile, Turkish military presence in the north continues to clash with

Kurdish forces, and Russian troops retain a reduced footprint focused on coastal assets. Humanitarian conditions are dire: the economy is in ruin, essential services remain limited, and 425,000 refugees returned during the first half of 2025, straining local infrastructure and services. Ethno-political tensions are rising, particularly between Sunni HTS elements, secular factions, and Kurds, while targeted violence against Alawites intensifies, exemplified by massacres and disappearances in coastal communities.

Key Threats & Risks (Top 5)

1. Insurgency & Extremist Terrorism Likelihood: Possible to Likely | Consequence: High

ISIS has reactivated sleeper cells in eastern Syria; attacks in Suwayda (May 2025) and plots near Damascus—including an aborted bombing at Sayyida Zaynab, **signal accelerating threat**. Al-Qaeda remnants and HTS hardliners also threaten reprisals. A major jihadist attack would destabilise government authority and endanger foreign personnel.

Indicators: Rise in ISIS propaganda, assassination attempts on officials, increased IED and sniper attacks.

2. Transitional Government Collapse (Factional Breakup) Likelihood: Possible | Consequence: Critical

Fragile alliances between HTS, Kurdish authorities, and secular groups risk collapse. If Kurdish SDF rejects integration or Sunni hardliners break away, Syria risks reversion to state fragmentation and conflict. Violence in contested zones (Aleppo, Raqqa) could rapidly escalate.

Indicators: Breakdown of political negotiations, emergence of splinter factions, armed clashes in strategic cities.

3. Regional Military Intervention Likelihood: Possible | Consequence: High

Turkish forces may escalate against Kurdish zones if autonomy progress continues. Israel breaks ceasefire and continues airstrikes on Iranian-linked targets; new provocations could lead to intensified strikes, potentially drawing in Hezbollah and triggering wider regional conflict.

Indicators: Turkish military build-up near Kurdish regions, revitalised Israeli airstrikes on Iranian-linked targets, heightened militia rhetoric.

4. Ethno-Sectarian Violence & Targeted Massacres Likelihood: Possible | Consequence: Medium

Sectarian violence, especially targeting Alawites, has surged post-regime, including reported massacres of up to 1,500 civilians. Continued disappearances and targeted attacks threaten intercommunal stability.

Indicators: Increased targeted killings, abductions of minority groups, rise in extremist sectarian propaganda.

5. Economic/Humanitarian Collapse Likelihood: Possible to Likely | Consequence: Medium

Severe economic distress, surging inflation, and resource shortages persist. Rising crime, looting, and small-scale protests over fuel and wages have emerged. Breakdown of public order could escalate into unrest that derails fragile governance.

Indicators: Rapid currency depreciation, widespread protests over fuel and wages, escalating crime and looting incidents.

Scenario Forecasting (July–Dec 2025)

Most Likely Scenario (Baseline): Gradual Stabilization Amidst Pockets of Volatility.

The transitional government survives the next six months without major fracture. There is a cautious improvement in daily life in core areas: for example, Damascus and Aleppo see modest reconstruction projects begin under international aid, and more refugees trickle back under UN supervision. Security incidents continue but at a manageable level, an ongoing insurgency in the eastern desert is countered by local militias with U.S. drone support, and isolated clashes occur in the south (Daraa/Suweida) with minimal spread. Turkish and Kurdish forces uphold an uneasy ceasefire, avoiding new hostilities.

Operational Implications: In this scenario, opportunities slowly open for NGOs and even businesses in relatively secure zones. Humanitarian access improves as front lines are mostly static. However, high vigilance remains essential – travel between cities still requires armed escorts, and some areas (e.g. rural Homs, parts of Deir ez-Zor) remain no-go due to insurgent activity. The situation is reminiscent of early post-conflict Iraq: hope tinged with uncertainty.

Worst-Case Scenario: Return to Widespread Conflict.

Political cohesion breaks down entirely by autumn 2025. Perhaps a contentious issue (like integrating HTS fighters into a national army) triggers a major rift: HTS hardliners declare a separate “Islamic administration” in Idlib, while the Kurdish SDF solidifies autonomous rule in the northeast. Fighting erupts as the central interim government’s forces splinter, factions battle for control in Aleppo, and multiple warfronts reappear. Amid the chaos, ISIS and other jihadists seize the opportunity: they overrun several towns in the east, committing atrocities and proclaiming a mini-caliphate. Foreign powers jump in: Iran covertly supports loyalist militias to carve out an Alawite enclave, Turkey moves tanks into northern Syria to “prevent terrorism,” and U.S./Coalition forces scramble to evacuate remaining personnel.

Operational Implications: This scenario represents a full-scale emergency. All client operations would be suspended; expatriate staff evacuations (likely via Turkey or Iraq) would be imperative as commercial flights shut down. Humanitarian agencies would revert to crisis footing, focusing on life-saving aid where possible. The environment would be as dangerous as the worst periods of the civil war (circa 2014-2015).

Early indicators for such a downward spiral include: open refusal of orders by major militia factions, collapse of peace negotiations (or UN process), and any instance of major armed confrontations between today’s allied groups (for example, HTS units skirmishing with FSA or Kurdish units around strategic locations).



Sector-Specific Implications:

The evolving context in Syria uniquely affects each sector::

- **Oil & Gas Sector:** Syria’s oil industry is mostly in the north-east (Deir ez-Zor and Hasakah), historically controlled by the SDF (with U.S. backing). Under the transitional arrangement, there is pressure to reunify oil management, but this remains unresolved – meaning companies must navigate a murky legal status. For now, **no major international O&G firms have re-entered Syria due to sanctions and instability. However, should conditions improve, opportunities to assist in restoring oil production may arise.** For H2 2025, the main risks are physical: ISIS has repeatedly attacked oil installations and will likely target any newly reopened oil facilities. Additionally, if Turkish-Kurdish tensions flare, oil fields could become collateral damage or bargaining chips (Turkey might bomb infrastructure to weaken Kurdish finances). Companies eyeing this sector must maintain sanctions compliance and be prepared for rapid withdrawal if security erodes. Expect continued oil smuggling and black-market dealings as local authorities fund their operations – a risk for anyone inadvertently entangled.
- **Construction & Infrastructure:** Reconstruction of war-torn Syria is urgently needed, and construction firms are positioning for contracts. In the transitional phase, critical infrastructure repair (power grids, hospitals, roads) is a priority, supported by international funding. Security risks for this sector include unexploded ordnance at worksites, deliberate sabotage by spoilers (an extremist bomb attack at a reconstruction site would both embarrass the government and deter investors), and theft of equipment by rogue militias. Construction projects in former frontline cities (Aleppo, Raqqa) require robust demining and force protection. Moreover, which authority grants permission can be ambiguous, companies might face parallel demands from a local militia and the central government for “fees” or permits. Until a clear legal framework emerges, the sector must treat contract enforcement and security costs as major risk factors.
- **NGOs & Humanitarian Agencies:** Humanitarian agencies are ramping up operations given Syria’s needs, but they must adapt to a shifting security mosaic. Areas like Idlib that were inaccessible under Assad are now open, but controlled by HTS-linked authorities who may impose their own restrictions (e.g. insisting on supervising aid distribution). NGOs face threats from both extremes: radical jihadists view Western aid workers as targets (for kidnapping or attacks), and some local power brokers may



resort to intimidation to influence aid allocation. There have been reports in early 2025 of aid convoys being looted by unidentified armed groups in eastern Syria, *likely criminal gangs taking advantage of weak policing*. Humanitarian staff should also be mindful of community tensions; returnee flows can spark competition for resources, leading to local violence. Organisations must engage with community leaders to defuse such tensions. Medical NGOs should note that health facilities were often targeted during the war; rebuilding them now could draw opportunistic violence or protest from those not benefiting. Overall, NGOs need high security protocols (including evacuation planning to neighboring countries) and must liaise closely with UN and local security forces to manage access safely.

- **Government Sector (Diplomatic and Public Sector):** For foreign governments and companies providing advisory services, Syria is a high-reward but high-risk arena in transition. Diplomatic missions that closed during the war may reopen – already some Arab embassies have resumed operations in Damascus. However, diplomats and government contractors face targeted threats: Iran-backed elements dissatisfied with the new order or ISIS cells could attempt attacks on high-profile international presences to make a statement. Any advisors embedded with the interim government should be alert to insider threats too; the vetting of former regime personnel is incomplete, raising espionage or sabotage risks within ministries. Another factor is legal liability, engaging the new government carries uncertainties about international recognition and the eventual legal framework. That aside, government-sector clients must be prepared to suspend activities if security degrades. They should maintain close evacuation ties (e.g. with military or UN flights out) and avoid concentrating all personnel in one location. On the positive side, if the transition holds, opportunities for governance support and training will grow, but will require operating in an environment with nascent rule of law and potential resentment from factions excluded from power.

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(Syria)

Support the Transition Cautiously:

Companies and NGOs should engage with the new authorities but **maintain neutrality** among factions. Avoid overt alignment with any one group (e.g. HTS) to reduce risks if power dynamics shift. Use international mechanisms (UN coordination forums, etc.) to get access and protection rather than relying solely on local armed escorts, which could compromise neutrality.

Harden Site and Personnel Security:

Treat Syria as an active conflict zone for planning purposes. Residual risks like IEDs require blast protection measures at facilities (sandbagging, perimeter standoff distance for structures). Residences and offices should have safe rooms and mass casualty kits. Field teams need tracking and daily check-in procedures. For travel, vary routes and use armored vehicles in high-risk areas (e.g. around Raqqa or Daraa). Curfews and no-go hours should be established for staff, especially expatriates.

Leverage Community Acceptance:

Just as vital as hard security is “soft” security through community acceptance. NGOs should hire local staff extensively and consult local councils or tribal elders when planning distributions or projects. This inclusive approach can yield tip-offs about impending threats and discourage community support for insurgents. Businesses venturing in should engage local partners or liaisons trusted by communities to signal they are contributing to local welfare (jobs, rebuilding) rather than exploiting.

Scenario Planning and Triggers:

Develop **contingency plans for rapid deterioration**. Identify clear triggers that would prompt evacuation or hibernation – for example, if any provincial capital experiences armed clashes for more than 24 hours, or if two or more NGO compounds are attacked in separate incidents. Plans should include multiple exfiltration routes (via Lebanon, Türkiye, or Iraq, depending on location) since borders can close suddenly. Pre-arrange emergency visas for local staff if possible, as a humanitarian evacuation might be necessary..

Training and Awareness:

Ensure all staff in Syria (local and foreign) receive training on personal security and are briefed on the complex threat environment. This includes mines/UXO recognition, basic field first aid (due to potential delays in medical response), and cultural/ethnic sensitivities given Syria’s patchwork of communities. A well-trained team is less likely to make fatal mistakes, such as straying into a known minefield or inadvertently offending a local armed group at a checkpoint.



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Libya Forecast

Security & Political Landscape

Since the October 2020 ceasefire, Libya balances between fragile stability and the persistent risk of renewed widespread conflict. The country remains primarily divided between the Tripoli-based Government of National Unity (GNU), led by Abdulhamid Dbeibah with Turkish backing, and the eastern Government of National Stability (GNS), led by Prime Minister Osama Hammad and backed by Field Marshal Khalifa Haftar and the Libyan National Army (LNA), with additional support from Russia's Wagner Group, Egypt, and the UAE. Protracted disputes over power-sharing and candidate eligibility continue to delay national elections, extending Libya's political uncertainty.

The crucial oil sector maintains operations under a delicate revenue-sharing agreement, but tensions around revenue distribution, infrastructure control, and key appointments remain flashpoints. Any unilateral moves could rapidly disrupt the sector, severely impacting Libya's economy and potentially triggering broader conflict.

In western Libya, internal stability deteriorates due to militia rivalries in Tripoli and neighboring towns like Zawiya, driven by territorial disputes and lucrative smuggling routes. The GNU's heavy-handed responses exacerbate tensions, increasing the risk of intensified militia mobilization.

In the east, Haftar's LNA maintains control with strategic support from Wagner

mercenaries. However, stability is contingent on external support and internal political dynamics. Southern Libya (Fezzan region) remains volatile, plagued by criminality, kidnappings, and militia competition over smuggling operations, further heightening security risks.

External influence, particularly from Turkey, Russia, Egypt, UAE, and increasingly Iran through proxy and smuggling networks facilitating Hezbollah's rearmament via Syria, adds layers of volatility. The elevated risk of Israeli strikes targeting these proxies in Syria, particularly around Damascus, further compounds regional instability and potential conflict escalation, posing ongoing threats to local and foreign personnel and assets.

Key Threats & Risks (Top 5)

1. Renewed National Conflict (East–West War)

Likelihood: **Possible** | Consequence: **Critical**

Potential collapse of GNU triggers LNA military advance or western militias internal collapse. Escalation would likely draw in regional and international powers, exacerbating the scale of conflict.

Indicators: Troop mobilisations westward, breakdown in central bank/oil talks, ceasefire breaches.

2. Militia Infighting in Western Libya

Likelihood: **Likely** | Consequence: **High** (localized)

Rival armed factions in Tripoli routinely clash over turf and political alignment. Persistent clashes can disrupt daily life, business operations, and humanitarian aid delivery significantly.

Indicators: Increased militia checkpoints, spikes in armed skirmishes, assassination of militia figures

3. Oil Sector Disruptions & Blockades

Likelihood: **Possible** | Consequence: **Medium**

Oil infrastructure remains vulnerable as a political lever. Extended blockades or sabotage could severely undermine Libya's economic stability and government funding.

Indicators: Eastern threats to halt production, withdrawal of eastern NOC staff, increased disputes over revenue.

4. Extremist / Terrorist Attacks

Likelihood: **Unlikely** | Consequence: **Medium**

Latent capability of desert-based jihadist cells (ISIS, al-Qaeda) for isolated attacks. Increased instability or reduced security oversight would likely embolden extremist elements.

Indicators: Increased jihadist propaganda, prison breakouts, small-scale IED incidents.

5. Crime & Kidnapping (General Instability)

Likelihood: **Likely** | Consequence: **Low to Medium**

High rates of kidnapping and banditry, especially prevalent in Fezzan and peri-urban areas. Heightened criminality disrupts local governance, commercial activities, and humanitarian efforts.

Indicators: Increased police warnings, rising kidnappings targeting migrants or foreigners, heightened local security measures.

Scenario Forecasting (July–Dec 2025)



Operational Implications: In this scenario, companies can operate but must be ready for intermittent interruptions. Travel between Tripoli and Benghazi might remain feasible via flights (with Tripoli’s Mitiga and Benghazi’s Benina airports open), though land travel to remote project sites in the south would remain hazardous. Security in major cities stays manageable with private security escorts, but contingency plans need to be in place for sudden flare-ups. International staff likely continue a cautious return (some energy and construction firms have trickled back into Tripoli and are resuming projects as noted in late 2024. However, any deep investments remain on hold pending clearer political outcomes.

Worst-Case Scenario: Back to Civil War

A plausible worst case would start with the collapse of the Tripoli government – either through a militia coup or the Prime Minister fleeing under protest pressure. Day 1 of this collapse might see multiple militias vying for control in the capital, government buildings looted, and the interim Prime Minister seeking refuge abroad or with a loyal faction. Sensing the chaos, Haftar’s LNA could issue an ultimatum or directly advance westwards, arguing the need to “secure the capital from terrorists.” Full-scale fighting ignites: airstrikes and artillery in Tripoli, western militias splitting into factions pro- and anti-LNA. The conflict could quickly spread to central Libya (Sirte basin) as the front line, and potentially to Misrata if Haftar’s forces push that far.

Operational Implications: All foreign operations would halt immediately. Embassies and international organizations in Tripoli would evacuate or bunker down (likely requiring military extraction via ship or air as commercial flights would cease and airports may be targets). Oil production would plummet – eastern forces might seize the oil crescent, and western fields could be shut by either sabotage or as precaution. The instability would probably spill into the Sahel, with fighters, weapons, and refugees flowing south, but that is beyond our immediate scope. For clients, this scenario is catastrophic: duty of care would require immediate evacuation or extreme risk mitigation for any remaining personnel, and assets on the ground could be damaged or inaccessible for a long period.

Early indicators of sliding into this scenario include: a dramatic spike in protests in Tripoli calling for Dbeibah’s ouster (especially if met with violence), open mutiny by a major Tripoli militia (e.g. if the powerful Special Deterrence Force switches allegiance), or an eastern parliament declaring a new government and asking for international recognition (signaling intent to overthrow Tripoli by force).

Most Likely Scenario (Baseline): Precarious Status Quo Endures

Libya likely muddles through the next six months without a definitive resolution or a new war, essentially an extension of the status quo. The GNU in Tripoli survives internal dissent a bit longer, possibly via a minor reshuffle or promises of eventual elections to placate critics. There may be short bursts of violence: for instance, a two-day firefight between militias in a Tripoli suburb over an arrest of a militia leader, which is then calmed by mediation. The ceasefire between east and west holds, aided by continued international pressure and the realisation on both sides that war would be costly. Oil production continues around current levels, albeit with a few brief disruptions (perhaps a local protest shuts an oilfield for a week before negotiations reopen it).

Sector-Specific Implications:

Each sector in Libya faces different operational challenges under these fluid conditions:

- **Oil & Gas Sector:** The energy sector is Libya’s most critical and has been surprisingly resilient under the unity of economic interests. If status quo holds, oil companies (including foreign ones) can continue operations, but they must maintain ties with both sides. Many oil facilities are in remote desert areas, where security is provided by whoever controls the region (LNA in the east/south, GNU-aligned units in the southwest). A major concern is being caught in the middle if those control patterns shift. Companies must plan for the possibility of having to evacuate staff or shut in wells on short notice. Additionally, the legal status of contracts remains tricky – any deals signed with Tripoli could be contested by the eastern authorities and vice versa. The sector also faces typical risks of aging infrastructure; accidents or sabotage can cause environmental and safety incidents (e.g. pipeline fires). As such, **business continuity plans and strong security agreements with local commanders are essential.** On the upside, if peace holds, there may be room to increase production or launch deferred maintenance projects, but only with careful risk assessment.
- **Construction & Infrastructure:** Construction projects (ports, housing, roads) depend on stability, and many foreign companies have hesitated to re-engage. Those that have resumed work in Tripoli or Benghazi must deal with militia protection rackets – effectively hiring one militia for site security can make you a target for its rivals. The fragmented authority means building permits and contracts might need dual approvals. A recurring risk is sudden funding shortfalls: Libya’s government revenues hinge on oil, so any dip can halt payments to contractors, leaving projects in limbo (this happened after previous blockades). The threat of damage is high if conflict erupts; heavy equipment can be commandeered or destroyed, and project sites might become battlefields (as seen in past fighting where airports under construction were bombed). Companies in this sector should maintain strong political networks and consider insurance for political risk. In a deterioration scenario, demobilizing staff and securing equipment early could save lives and assets.
- **NGOs & Humanitarian Agencies:** Humanitarian presence in Libya is lower compared to Syria or Iraq, but some NGOs operate, focusing on migrants, health, and conflict mediation. They work in a context of lawlessness and suspicion. Both major parties exert control over aid access; for example, NGOs in the east need LNA permission, and

in the west they navigate multiple militia checkpoints. A key risk is detention of NGO workers – Libyan authorities (or militias) have detained staff on allegations of spying or for leverage. For instance, in 2023, several staff of an international NGO were arrested in eastern Libya on vague charges. Additionally, humanitarian operations in the south face threats from armed groups and bandits. Landmines and UXOs remain scattered in former frontline areas around Sirte and south Tripoli, posing risks to aid convoys. The possibility of large humanitarian crises (as seen with the Derna flood) is real; agencies must be ready to surge response amid insecurity. Maintaining acceptance among communities and communication with all sides is the best mitigation. Evacuation plans for personnel (e.g. via Tunisia or Egypt by road/air) must be in place given how fast front lines can shift.

- **Government Sector (Diplomatic and Public Sector):** Government sector clients (diplomatic missions, advisors, or contractors on government-funded programs) in Libya face one of the most politically charged environments. Embassies in Tripoli are limited (many closed since 2014, with only a few reopened), so any presence is conspicuous. They are high-value targets for extremists or even militias wanting to make a political point. For example, the U.S. Embassy is not yet open in Tripoli; if it or others were to open, they’d immediately require fortress-like security and could become flashpoints if violence flares. Even UN personnel faced mob attacks in the past. For those advising government institutions, duplicity risk is high: partnering with Tripoli might alienate the east, and vice versa. If war resumes, diplomats could find themselves mediators or be trapped. It’s essential for government sector actors to have robust evacuation plans (likely coordinated by their home militaries) and to minimize staff numbers in Libya to core essential personnel. A promising sign, in a stable scenario, would be progress on unifying institutions – advisors might then help unify the Central Bank or ministries, but until then they must operate in a partitioned system with caution.

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Risk Mitigation & Recommendations

(Libya)

Engage in Active Monitoring & Local Networking:

The Libyan environment can change overnight. Companies and organisations **must invest in real-time information sources** – hire local security coordinators who are plugged into militia and community networks, and consider security intelligence services for warning of conflict build-up. Close coordination with the UN mission (UNSMIL) and peer organisations can provide early notice of trouble (e.g., signs of militia mobilization in Tripoli). Establish communication channels with key local actors (tribal elders, militia leaders, municipal officials) long before crises, so you have points of contact to call upon for negotiation or information if roadblocks or incidents occur.

Heed No-Go Zones and Dynamic Security Postures:

Maintain a **security posture that can tighten on short notice**. For example, operate on a low profile basis in day-to-day calm (unmarked vehicles, plainclothes security) to avoid drawing militia attention, but have the capability to harden if conflict ignites (armored convoys, relocation to hardened facilities like secured compounds or even offshore accommodation if needed). Certain areas of Libya should remain off-limits to operations until further notice, such as Sabha and the deep south (due to lawlessness and extremist hideouts) or front-line areas around Sirte. If an area is designated as a “red zone” by reliable sources, respect those designations strictly.

Plan for Evacuation and Hibernation:

All organisations must have an evacuation plan from both Tripoli and Benghazi (and any other bases). This includes identifying assembly points, securing multiple routes (land to Tunisia/Egypt and air/sea options). Drills should be conducted. Equally, prepare to shelter in place if sudden fighting traps staff. As a lesson from past Libyan flare-ups, sometimes locking down for a short period until a ceasefire resumes is safer than attempting road evacuations amid crossfire.

Protect Critical Assets and Data:

Given the threat of looting and destruction, ensure backups of important data off-site (out of Libya) and have contingency funds/resources outside the country to support staff if they’re evacuated with nothing. Critical physical assets on the ground (vehicles, rigs, etc.) might be lost in a war – consider insurance and also strategies like moving equipment to more secure locations if tensions rise. For example, vehicles could be moved inside a fortified oil compound or even across the border if warning time permits.

Community Security Agreements:

In areas of operation, work out security guarantees with local power-holders. Ideally involve community leaders and provide community benefit. These agreements can often deter opportunistic attacks and may provide a layer of safety if broader conflict erupts (the local group has a stake in shielding your operation).



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Cross-Cutting Thematic Risks

Terrorism & Insurgency Trends

Transnational terrorism remains persistent across high-risk MENA regions. ISIS and al-Qaeda franchises continue adapting rather than disappearing. ISIS activity remains low-level in Iraq but is escalating within Syria's ungoverned spaces, and the group is actively expanding into global peripheries like Africa.

Key threats include:

- ▶ Small-scale, high-impact attacks (assassinations, hostage-takings, vehicle-borne IEDs).
- ▶ Potential reversal of foreign fighter flows: extremists from the Sahel or Afghanistan infiltrating Syria, Iraq, or Libya.
- ▶ Cross-border threats from IS-K (ISIS Khorasan), whose activities in Afghanistan could indirectly impact MENA by diverting counterterror resources or creating refugee flows.

Operational Recommendations:

- ▶ Maintain vigilant situational awareness; update threat assessments regularly.
- ▶ Establish intelligence-sharing mechanisms with international coalitions and local authorities.
- ▶ Implement comprehensive security measures (access controls, attack-response training, community engagement).
- ▶ Conduct scenario exercises and develop robust business continuity plans for potential attacks.

Economic & Regulatory Risks

Economic instability and regulatory unpredictability significantly affect operations across MENA hotspots. Key risk categories include:

Sanctions:

- ▶ **Syria** faces ongoing international sanctions, with potential future waivers.
- ▶ **Libya** risks new sanctions if conflict resurges, targeting illicit activities.

Recommendation: Diligent compliance tracking (U.S., EU, UN sanctions) and legal contingency plans.

Economic Hardship & Unrest:

- ▶ Unemployment, subsidy removals, and price volatility provoke protests and strikes.
- ▶ Historical precedent of riots in response to fuel shortages or subsidy cuts.

Recommendation: Monitor economic indicators (inflation, commodity prices) as early warnings of social instability.

Currency & Financial Stability:

- ▶ **Iraq** experiences dinar fluctuations linked to dollar-smuggling crackdowns.
- ▶ **Syria** faces hyperinflation risks amid extreme currency weakness.
- ▶ **Libya** remains vulnerable to parallel currency systems due to dual central bank factions.

Regulatory Unpredictability:

- ▶ **Syria's** transitional authorities might enact reforms affecting contracts.
- ▶ **Iraq's** political shifts could alter investment regulations and visa regimes.
- ▶ **Libya's** rival governments issue conflicting regulations.



Cybersecurity Threats

Cyber threats increasingly target MENA operations, including conflict zones. Actors involved include state-sponsored hackers, hacktivists, and cybercriminals. The Middle East experienced heightened cyber attacks on infrastructure amid 2024 geopolitical tensions.

Key cyber threats include:

- ▶ Infrastructure targeting by Iranian groups for espionage or disruption.
- ▶ Militia cyber-attacks on NGOs for intelligence gathering.
- ▶ Ransomware targeting hospitals, banks, and government offices (average breach cost exceeding \$8 million, nearly double global averages; weforum.org).
- ▶ Information warfare involving disinformation through compromised social media or websites.

Operational Recommendations:

- ▶ Regular software updates and encrypted communications.
- ▶ Staff training on phishing and cyber hygiene.
- ▶ Use air-gapped systems for critical data storage.
- ▶ Cyber contingency measures integrated into incident response plans (offline backups for emergency contacts and procedures).
- ▶ Evaluate cyber insurance coverage for conflict-affected operations.

Climate-Induced Security Risks

Climate change significantly amplifies security risks across the MENA region, characterised by rising temperatures, prolonged droughts, and severe water scarcity.

Primary climate threats:

- ▶ **Extreme Weather:** Infrastructure vulnerability highlighted by Libya's Storm Daniel disaster in Derna.
- ▶ **Water Scarcity & Resource Conflicts:** Tensions within Iraq's Euphrates-Tigris basin and potential confrontations over water allocation. Syria's drought conditions remain critical, potentially fuelling local conflicts exploited by militant groups.
- ▶ **Economic Instability:** Libya's dual threat from coastal flooding and desertification exacerbating governance and security issues, pushing populations towards illicit economic activities.

- ▶ Emerging regulatory responses mandating costly adaptation measures.

Operational Recommendations:

- ▶ Incorporate climate risk assessments into site selection (flood risk mitigation).
- ▶ Adjust operations around peak climate events (e.g., work hours, cooling systems).
- ▶ Engage in proactive community support initiatives (e.g., water access programmes).
- ▶ Monitor regulatory developments and climate activism that could affect operations.

Operational impacts include:

- ▶ Increased frequency of disruptive weather events (floods, sandstorms).
- ▶ Direct impacts on logistics and operations (facility closures, logistics disruptions).
- ▶ Chronic health impacts on workforce productivity due to extreme heat.

Conclusion & Outlook

Near-Term Outlook (early 2026):

As the forecast period closes at end-2025, several emerging risks loom just beyond the horizon. In **Iraq**, attention will turn to the next parliamentary elections (due in 2026). The run-up to those elections could reignite political tensions and street activism, especially if factions jostle for power or if popular Shia cleric Muqtada al-Sadr, for example, remobilises his base.

Early 2026 might see increased politicking and possibly protests or minor violence as power brokers negotiate coalitions – a situation to watch closely as it could alter Iraq’s risk profile. **Syria** may approach a crossroads regarding international recognition and reconstruction. If the transitional government survives six months, there could be calls for a formal peace treaty or new constitution by early 2026. However, the wildcard is whether hardliners (either jihadists or ex-regime loyalists) spoil this progress. A significant wildcard event for Syria just after our horizon would be a possible referendum or leadership change within the interim government that could either solidify stability or trigger new splits.

Libya is tentatively expected to attempt elections again in 2026 if conflict is averted in 2025 – any such prospect will dominate the outlook, and the mere preparation for elections could either be a breakthrough (legitimizing a single government) or a breakdown (if rival authorities contest the process). Companies should be prepared for both possibilities: either a more stable, unified Libya on the horizon (with investment opportunities unlocked), or a slide into prolonged division if talks fail.

Forecast Confidence & Caveats:

The forecasts in this report carry a **moderate level of confidence**. There are known trends – e.g., the persistent presence of ISIS or the structural divisions in Libya – that allow us to make informed predictions. However, these complex environments mean outcomes can diverge rapidly due to unforeseen catalysts. Our assessments assume current trajectories hold, but **wildcard events** could upend expectations. One such wildcard would be a **major external shock**: for instance, a sudden military confrontation between the U.S. and Iran (or Israel and Iran) could dramatically impact Iraq and Syria overnight, far beyond our current baseline of relative restraint. This could manifest as missile strikes or a regional war scare that forces evacuations (as seen during past U.S.-Iran escalations). Another wildcard is **leadership volatility** – the incapacitation or death of a key figure (e.g., Libya’s Haftar, who is crucial to the east’s cohesion, or one of Syria’s transitional leaders) could create a power vacuum and unpredictability in succession.

We should also consider potential “**red herring**” indicators – issues that may alarm but not actually portend significant change. For example, periodic **tribal clashes in Iraq’s south or inter-militia skirmishes in Syria’s northwest** might spike in media reporting and appear to signal wider instability, but if they remain localized, they might not truly derail the overall security trajectory. Distinguishing such red herrings from true escalation signs is part of our ongoing analysis. In that vein, not every protest will lead to revolution, and not every militant attack means resurgence – context and trajectory matter.

Overall Outlook:

The H2 2025 period will demand vigilance and agility from CRS clients. While there are glimmers of opportunity – Iraq’s relative calm enabling business growth in some areas, Syria’s transitional phase potentially opening new avenues for engagement, and Libya’s continued oil production offering economic stakes – these exist side by side with high-impact dangers. Clients operating in these high-risk industries and regions should remain on a proactive footing: constantly updating contingency plans, investing in strong relationships (with local communities, partners, and security forces), and being ready to respond to both gradual changes and sudden shocks.

The “watchword” for the next six months is **cautious optimism**: cautious, because the downside risks are severe and require preparation; optimistic, because incremental improvements (if nurtured) could yield longer-term stability dividends. By following the recommendations in this forecast – and staying attuned to our updates and alerts – CRS clients can navigate the remainder of 2025 more safely and strategically. We will continue to monitor all the outlined indicators and stand ready to assist in translating foresight into effective on-the-ground action.

Supplementary Incident Data

(All data counts cover January – June 2025, unless otherwise noted, illustrating the security environment preceding H2 2025.)

Iraq:

- ▶ Number of ISIS-claimed attacks in Iraq during H1 2025: ~40 (down from the same period in 2024, reflecting ISIS degradation). Most attacks were low-casualty and occurred in Diyala and Kirkuk provinces.
- ▶ Recorded militia attacks (rockets/IEDs) on U.S. logistic convoys: 15 (mostly in southern Iraq along highway routes, causing material damage but no casualties). This is on par with 2024 tempo, indicating persistent, low-level harassment.
- ▶ Protest events recorded by ACLED in Iraq H1 2025: 27 (smaller-scale, issue-specific protests; notably far fewer than the hundreds in 2019). Key issues included electricity outages and water shortages in Basra.

Syria:

- ▶ Conflict-related fatalities in Syria Jan–June 2025 (estimate): 1,200. This figure spiked in Jan-Feb during regime change battles and has since trended downward. By May-June, monthly fatalities were under 100 – a significant change from wartime, though incidents continue.
- ▶ ISIS-attributed attacks in Syria in H1 2025: ~60, a marked increase year-on-year. Many were hit-and-run strikes in the central desert.
- ▶ Refugees returned to Syria post-Dec 8, 2024 (as of June 2025): 425,000+. Top returnee origin countries: Turkey (~250k), Lebanon (~100k), Jordan (~50k), Iraq (~25k).
- ▶ Humanitarian access: UN reports 5 aid convoys crossed into northwest Syria per month on average in early 2025, up from 3 per month in 2024, reflecting improved cross-line coordination.

Libya:

- ▶ Number of armed clashes in western Libya in 2024: 129 (Jan – Nov), compared to 67 in 2023 – nearly doubling, indicating increasing militia friction.
- ▶ Protest events in Libya (all regions) in 2024: 180+, with 132 in the west alone. Primary grievances: power outages, fuel prices, delayed salaries, foreign interference.
- ▶ Oil production (average) H1 2025: 1.05 million barrels per day, relatively stable. However, a 2-week shutdown of four eastern oil ports occurred in March 2025 due to a pay dispute – resolved by negotiations.
- ▶ Terror incidents: Only a handful of minor IED or mine explosions reported in 2024–2025, mostly legacy mines in the south. No major jihadist attack since 2021, underscoring the current low profile of ISIS in Libya.

(Data sources: ACLED database, United Nations reports, Libyan National Oil Corporation statements, and CRS internal incident tracker. Note that due to reporting gaps in conflict zones, figures may be underestimates; they are intended for trend illustration.)

2025

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