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AMER

Canada: New “ReArm Europe” Security Pact with European Union (EU) is emblematic of global shift toward Europe in response to US withdrawal from international security commitments. On 23 June, the Canadian Prime Minister, Mark Carney, announced a new Security and Defense partnership between the EU and Canada. The plan will facilitate increased procurement collaboration and industrial cooperation on defense capabilities. Under the pact, Canada will invest 150 billion Euros to support EU member states' defense industries and capabilities. The pact also allows Canadian companies to participate in the EU's new Security Action for Europe (SAFE) Resolution, which is meant to help build up domestic EU defense companies to limit reliance on foreign manufacturers. The agreement also stressed the expansion of joint efforts in maritime security and coordinated naval activities. The decision comes as Canada and the EU face increased hostility from the Trump Administration over trade, national sovereignty, and foreign policy. The Trump administration's skepticism of international security alliances and grievances about fair burden sharing, coupled with a more isolationist policy stance, has prompted many traditional US allies, such as Canada and the EU, to seek new partners. Carney has persistently highlighted the vulnerabilities that Canadian reliance on the US military industry produces and emphasized the need for strategic diversification. This attitude is demonstrative of a significant shift from the traditional hegemony of US-led Western security. As further Western countries move to decouple their defense industries from being dependent on the US, an expansion of domestic production and restructuring of procurement processes can be expected, opening new multinational business opportunities.

United States: Growing normalization of violence against Immigration and Customs Enforcement (ICE) Agents underscores the rising security risk to bystanders during two recent incidents. On 10 June, ICE officers conducted a raid at a farm in the Southern California county of Ventura. Approximately 100 individuals attempted to block the entrance of agents into the farming facility and threw stones. The agents responded by deploying tear



gas and rubber bullets. While retreating, a protester discharged a pistol in the direction of the agents multiple times, but did not hit anyone. Although the agents did not return fire, the use of a firearm contributes to the normalization of gun violence as a protest tactic against ICE agents. Another notable incident of migration-related violence occurred on 4 July, during an attempted ambush by at least 10 individuals outside of an Immigration detention center in Alvarado, Texas. The perpetrators used AR-15s and fireworks to attack officers. On 7 July, a man with a rifle and tactical gear was killed while exchanging fire with law enforcement officers outside of a Border Patrol facility in McAllen, Texas. In the past, violence related to immigration had been localized to planned protests and detention centers. However, as immigration remains a fraught issue in the US, imitators will likely feel emboldened by these incidents to commit further attacks. Violent clashes are expected to persist and increase throughout 2025 and beyond as ICE is set to receive a dramatic increase in funding to expand its scope of operations. Individuals should exercise increased caution around migrant detention centers and ICE offices. It is advised to avoid proximity to any demonstrations over immigration and refrain from interfering with the activities of ICE agents due to the heightened risk of violent escalation.

Chile: **Increasing economic cost of crime surge is emblematic of greater regional struggle toward economic development.** Since 2016, Chile has experienced a steady increase in violent crime. The homicide rate has nearly tripled, increasing from 2.32 per 100,000 people in 2016 to 6.0 per 100,000 in 2024. While this rate remains comparatively low in a regional context, the rate of increase since 2016 has had a disproportionately high economic impact. Chile is losing an estimated 8.2 billion USD annually due to the rising crime rates. Individuals are altering their daily routines, such as avoiding nightlife activity, limiting non-essential travel, and abstaining from shopping in higher crime areas. Additionally, businesses have shortened their operational hours, leading to an inevitable loss of revenue, compounding the economic issue. Countries with normatively higher crime rates possess societies and commercial sectors that have institutionalized specialized adaptations to their environment to continue functioning. However, Chile has not accomplished this yet, and in the absence of a comprehensive strategy to reduce crime, the



outlook remains negative. The World Bank’s 2025 Latin America and Caribbean Economic Review (LACER) has forecasted that the region will experience the lowest economic growth globally over the next two years, underscoring a larger regional instability and vulnerability to security-linked economic disruptions.

Mexico: **Anti-tourism protest in Mexico City demonstrates the growth of global anti-tourist and anti-American sentiment abroad.** On 4-5 July, hundreds of residents in Mexico City’s Condesa and Roma neighborhoods staged large-scale protests citing grievances regarding gentrification and “mass tourism”, with explicit animosity directed towards American “digital nomads”. Protesters became unruly and harassed individuals in public, whom they identified as tourists, and broke into multiple storefronts. Following the post-pandemic rise in global tourism, there has been a consequential surge in Airbnb listings globally. There has been a rough increase of 26,000 listings in Mexico City alone. This has driven a rapid rise in rental prices throughout these districts that can displace locals. This protest appears to be an extension of the anti-tourism movement, which has spread throughout Southern Europe in cities like Barcelona, Lisbon, and Venice. These protests have similarly displayed an explicit targeting of US nationals, who are often depicted as symbols of economic displacement and neocolonial privilege. Anti-tourism protests are expected to persist globally over the coming months during the summer season, with activist groups in Mexico City signaling further actions unless regulatory measures are enforced. Travelers should exercise increased caution in areas known for tourism or Airbnb and remain informed about planned demonstrations. It is advised to avoid engaging if confronted during a protest by angry individuals and plan alternative routes to avoid any escalatory interactions.



EMEA

Democratic Republic of Congo: Peace deal renews hopes for increased regional stability and expansion of Western interests in mining sector. Rwanda and the Democratic Republic of the Congo (DRC) agreed to a peace deal, brokered by the US, signed on 27 June. Eastern DRC has been engulfed in a brutal renewal of a conflict over resources since early 2025, as the M23 rebel group - supported by the Rwandan government and supplemented by their forces - captured strategic cities like Goma (23-30 January), and Bukavu (5-16 February). A US and Qatar-mediated truce initiative culminated in a draft of a peace pact formally signed on 27 June. The agreement includes a phased Rwandan troop withdrawal over three months, reintegration of militias into the DRC's national army (FARDC), and shared mechanisms to safeguard territorial integrity. The accord is tightly linked to US strategic and economic interests, particularly access to the DRC's mineral wealth, including vast deposits of cobalt, coltan, gold, and lithium essential to - and includes terms for American investment in mining infrastructure that is representative of the growing US strategic interest in countering Chinese and Russian investment in mineral mining.

The agreement positions the US and US business entities as central actors in a region traditionally influenced by France and increasingly targeted by Russia and China over the past decade. By facilitating Rwanda's phased military withdrawal and implementing an exclusive investment scheme in rare minerals, the deal aims to stabilize the region while ensuring US economic influence. If not paired with sustained diplomatic engagement, inclusive governance reforms, and regional security cooperation, the deal may entrench external resource interests while failing to resolve the structural drivers of instability—ethnic tensions, militia economies, and weak state capacity.

Greece: Expect further wildfire-driven disruptions to coastal infrastructure as extreme heat heightens seasonal fire risk. On 26 June, a short-circuit in an overgrown green zone in Attica sparked a wildfire that destroyed three homes, damaged ten more, and prompted the evacuation of nearly 1,000 people. A second major blaze erupted on 3 July in Crete's



Ierapetra region, forcing over 5,000 evacuations, including 1,500 residents and thousands of tourists. In recent years, wildfires in Greece have become more frequent and operationally disruptive due to the normalization of soaring temperatures caused by climate change. These fires increasingly affect arterial roads, ferry routes, and regional supply chains critical to the tourism and service sectors. The recurrence underscores persistent weaknesses in land management, power grid safety, and emergency coordination. Travelers should monitor alerts via the 112 system, maintain flexible itineraries, and verify contingency plans for high-risk zones. Stakeholders are advised to review wildfire exposure around power infrastructure and confirm the readiness of local vetted transport and evacuation support.

Israel/ Palestine: Continue to monitor progress for a possible ceasefire agreement in the coming weeks as the United States continues to apply pressure and the negotiating parties signal renewed openness. On 1 July, Israeli Prime Minister Benjamin Netanyahu agreed to a provisional 60-day ceasefire that would see 10 living and 18 dead hostages exchanged for Palestinian prisoners, partial withdrawal of the Israeli Defense Force (IDF) from Gaza, and increased amounts of aid. The proposal does not include a framework for transitioning the ceasefire into a permanent end to the war, but a commitment to hold negotiations for that purpose is written into the ceasefire terms. Hamas has yet to agree to the current proposal and continues to remain staunch in their demands for a permanent ceasefire and a complete withdrawal of Israeli forces from Gaza - something Netanyahu has repeatedly stated is not an option at this time. Both sides have stated they will not abandon their hardline demands, for Israel's complete disarmament and expulsion of Hamas from the Gaza Strip, and for Hamas, a full Israeli military withdrawal from Palestinian territory. Hamas' incentives for agreeing to the 60-day ceasefire would be the opportunity to recover, re-group, and focus on suppressing anti-Hamas Palestinian dissent groups - it is doubtful they are committed to achieving lasting peace. However, should a ceasefire be agreed to, it would lower tensions both in the region and abroad, lowering the likelihood of anti-Israel attacks being carried out abroad and in Israel as a means of protest against the war. Demonstrations calling for a permanent ceasefire and complete withdrawal of IDF forces are likely to increase and become more desperate as the 60-day window closes. It is recommended to avoid any protests related to the war and maintain heightened situational



awareness if traveling through Israel, especially in public transportation areas, as these are common targets for terrorist attacks.

Turkey: Expect disruption throughout urban centers as authorities continue to detain members of prominent opposition party. On 1 July, in the city of Izmir, Turkish authorities detained over 109 people, including various members of the Republican People's Party (CHP). The charges levied against the politicians include corruption, tender rigging, and fraud. These arrests continue the pattern of the ruling Justice and Development Party's (AKP) months-long crackdown on the opposition party, which included the detention of Istanbul mayor Ekrem Imamoglu in March on corruption charges. The international consensus, however, agrees that the charges are most likely motivated by political reasons, as Imamoglu is the most prominent political rival of current AKP President Recep Erdogan. The detention of Imamoglu sparked massive protests throughout Istanbul but failed to sustain their momentum. The CHP, as well as several civil rights groups, have condemned the persistent crackdowns as a cover to silence dissent against President Erdogan. It is likely that as Erdogan continues to engage in further authoritarian actions, protests and politically motivated violence will increase in city centers and near government facilities, especially in Istanbul. Travelers are advised to avoid planned demonstrations due to the elevated risk of incidental harm. Additionally, it is recommended to limit public statements critical of the ruling party or Erdogan himself to avoid any arbitrary targeting by authorities.

Poland: Imposition of stricter border crossing procedures continues trend of other European countries concerned with security implications of irregular migration. As of 7 July, Poland has reinstated temporary border checks with Germany and Lithuania, citing rising concerns over irregular migration and national security. These inspections are being conducted at 52 locations along the 290-mile German border and 13 locations along the 65-mile Lithuanian border. While the controls are set to remain in place for 30 days, officials have not ruled out an extension. The implementation of more stringent controls reflects a broader European trend: as irregular migration increases and domestic political polarization deepens, countries both inside and outside the Schengen zone are tightening their border



policies. The potential for increased traffic congestion for travelers and shipping at land border crossings will incur prolonged delays and increased costs. For supply chains and companies within Europe that have capitalized on seamless cross-border movement, the short and long-term economic fallout of increased border controls stands to extrapolate. Continue to monitor announcements regarding border control procedures and account for likely delays.

Kenya: Violent antigovernment protests result in dozens of deaths after looting and widespread property damage overtake the nation's capital. On 7 July, 31 individuals were killed after protestors clashed with law enforcement in Nairobi. A further 500 were arrested and 100 injured by gunfire amid the widespread destruction of public areas by protesters. The demonstrations were led by youth and civil society groups who were motivated by anger over police brutality, alleged government corruption, and rising living costs to commemorate the anniversary of last year's protests against a controversial tax reform bill, which ultimately resulted in the deaths of 60 activists. Over the past 35 years, the government of Kenya has evolved to use increasingly more authoritarian tactics in both its policies and how it reacts to public criticism. Demonstrations and commensurate violence will likely continue as government forces enact an official policy of disregard for the rights of civilians to protest, and the government itself continues to engage in repressive policies. Travelers are advised to avoid high-risk areas in Nairobi where riots are common and to utilize secure transportation services if travel is necessary.



APAC

China/Japan: Monitor elevated compliance and reputational risks amid further revelations that fentanyl precursor chemicals are being trafficked throughout Asian supply routes to North America. A June 2025 joint investigation by Nikkei Asia and Bellingcat found that Chinese trafficking groups used Japan-based firms to ship fentanyl precursors under the guise of “legal research chemicals.” This follows US Department of Justice (DOJ) indictments of two Indian chemical firms the same month, underscoring how traffickers exploit the pharmaceutical credibility of countries like India and Japan to obscure illicit shipments within legitimate commercial flows. Pharmaceutical logistics providers and Active Pharmaceutical Ingredients (API) distributors face escalating compliance risk as US regulators intensify fentanyl-related enforcement targeting vendor networks in low-risk jurisdictions. Logistics managers should engage port agents and customs brokers to preempt delays and ensure fallback shipping lanes are in place. Firms sourcing manufacturing throughout Asia should verify third-party chemical suppliers and prepare for increased disruptions tied to heightened enforcement actions. Stakeholders should anticipate further pressure on transnational chemical trade flows as US officials escalate fentanyl-related investigations through maritime and customs channels.

Pakistan: Stakeholders should reassess exposure and investment viability following Microsoft’s decision to shut down local operations amidst mounting uncertainty. On 4 July, Microsoft announced the closure of its Pakistan office after 25 years, citing operational consolidation, with future services to be handled by regional hubs and local partners. The move eliminates in-country representation and underscores deepening concerns over regulatory unpredictability and eroding investor confidence. Microsoft’s exit follows a near-collapse of Pakistan’s startup sector, where venture funding plummeted by 88 percent between 2022 and 2024. Islamabad’s proposed national firewall is compounding the retreat, which threatens cloud service continuity and undermines cybersecurity standards. As foreign reserves fall to roughly 11.5 billion USD and last year’s fiscal year trade gap reached



24.4 billion USD, stakeholders increasingly face challenges tied to currency risk and capital controls. Meanwhile, escalating tech-sector unemployment and a worsening brain drain suggest a long-term structural decay in Pakistan's innovation capacity. For foreign digital service providers and infrastructure planners, the risk profile now includes rising latency due to degraded connectivity, workforce instability, and abrupt policy reversals that could disrupt licensing and taxation. Adding a layer of risk is Pakistan's deteriorating security, particularly insurgent and separatist actors such as the Balochistan Liberation Army (BLA) in the southwest region, further undermining overall state efforts to maintain control. Enterprises with ongoing or planned assets in Pakistan should diversify cloud region dependencies, build contingency for service fragmentation, and monitor for regulatory escalation that may catalyze further exits.