RISK OUTLOOK

MAY 2026

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Political and Economic Outlook

By Marisa Lourenço

Iran war fallout: Pressure entrenches as policy flexibility narrows

South Africa is now experiencing the economic effects of the conflict between the United States, Israel and Iran (the "Iran war") in a more sustained and visible manner.

The initial global reaction — a sharp rise in oil prices driven by concerns over potential supply disruptions through the Strait of Hormuz, a key chokepoint for roughly a fifth of global oil trade — has eased from its early peaks.

However, prices remain elevated and highly sensitive to renewed escalation. What has emerged is not a once-off shock, but a period of continued volatility and sustained cost pressure.

For South Africa, the implications are direct. The country imports the majority of its fuel requirements, meaning global price movements feed quickly into the domestic economy.

What began as a forward-looking risk has now progressed through its initial stages and continues to unfold in sequence: currency pressure, fuel price adjustments, and the gradual build-up of inflation.

This process is largely independent of domestic policy choices. The fuel-pricing framework passes international price movements and exchange-rate shifts directly through to the local market, while key inputs such as fertiliser remain heavily import-dependent.

As a result, there is limited capacity to cushion the impact, and the effects are likely to persist into the second half of the year even if the external shock stabilises.

Currency pressure remains the first transmission channel

The rand absorbed the initial shock in early March, weakening sharply as global risk sentiment deteriorated and capital flowed toward safe-haven assets such as the US dollar.

While volatility has since moderated, the currency remains exposed to external shifts, particularly in an environment where global uncertainty persists.

The earlier depreciation — from around ZAR16/$ at the end of February to above ZAR17/$ in March — has already translated into higher import costs across fuel, fertiliser, and other dollar-priced inputs.

Although the rand has stabilised within a narrower range, the underlying vulnerability remains, reflecting both global conditions and a limited improvement in domestic growth fundamentals.

While this does not materially alter the sustainability of government debt, which remains largely rand-denominated, it does narrow policy flexibility.

A weaker currency feeds directly into inflation and reduces the scope for monetary easing at a time when the economy is facing an externally driven shock.

Fuel price pressure continues to feed through

The April fuel price increase marked the first full pass-through of higher global oil prices and earlier currency weakness into the domestic economy.

That adjustment has now been realised, with diesel increases particularly pronounced due to its direct exposure to international pricing.

Recent data indicates that while some pressure has eased from early-April peaks, under-recoveries remain, particularly in diesel. This suggests that elevated pricing conditions are likely to persist in the near term, even if the magnitude of monthly adjustments varies.

Government's temporary intervention — a reduction in the general fuel levy between April and early May — provided short-term relief but has now lapsed. With fiscal consolidation remaining a central policy objective following the February 2026 budget, there is limited scope for further sustained intervention.

The result is a continued pass-through of fuel price increases to both households and businesses, reinforcing cost pressures across the economy.

Inflation pressure is now becoming more visible

The impact of higher fuel costs is beginning to reflect more clearly across the economy. Transport and logistics costs are rising, with early indications from the freight sector pointing to sustained pressure on operators, many of whom face diesel costs accounting for between 35% and 55% of operating expenses.

These increases are being passed through more consistently, contributing to a gradual but broad-based rise in prices.

Inflation, which remained relatively contained earlier in the year, is now trending upward, with expectations shifting toward the upper end of the South African Reserve Bank's target range in the near term.

Structural constraints amplify this effect.

Heavy reliance on road freight, combined with inefficiencies in logistics networks, accelerates the transmission of fuel price increases into the wider economy.

Cost pressures are therefore likely to become more entrenched rather than temporary.

This also affects the monetary policy outlook. Expectations of further rate cuts have moderated, with the Reserve Bank likely to maintain a cautious stance as inflation pressures build.

Fertiliser costs introduce a second wave of pressure

Alongside fuel, fertiliser remains a secondary but significant transmission channel, particularly for food inflation.

Global fertiliser prices remain elevated, driven by higher energy costs and ongoing uncertainty around supply routes linked to the Strait of Hormuz.

While South Africa sources fertiliser from a diversified supplier base, it remains exposed to both pricing pressures and logistical disruptions, particularly for nitrogen-based products.

The impact is more gradual but potentially more persistent. Higher input costs are now being absorbed within the agricultural sector, placing pressure on margins and influencing planting decisions.

Early indications suggest adjustments in application rates and crop strategies, which may affect yields later in the cycle.

This creates a lagged effect. While fuel-driven inflation is already visible, fertiliser-related pressures are likely to emerge more fully over the coming months, contributing to sustained upward pressure on food prices.

Supply disruption risk remains a secondary but credible concern

Fuel and fertiliser shortages are not currently the base case, but the risk remains contingent on the duration and intensity of the conflict.

South Africa's reliance on imported refined fuel products continues to constrain flexibility.

With limited domestic refining capacity, the ability to shift supply sources depends on global availability, shipping logistics, and port capacity — none of which can be adjusted rapidly.

Strategic reserves provide only limited cover, widely understood to extend for a short duration. While alternative supply options exist, they would be difficult to activate quickly enough to fully offset sustained disruption.

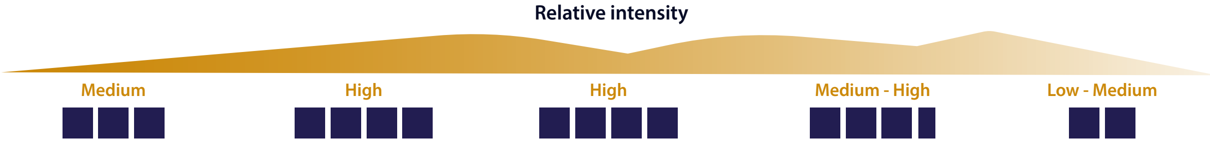
A similar dynamic applies to fertiliser supply. While sourcing is diversified, prolonged disruption to shipping routes or energy markets would increase the likelihood of delayed deliveries and tighter supply conditions.

Timeline of Key Economic Impacts of Iran War (May 2026)

The external shock is moving through the economy in sequence. What began as currency pressure has progressed into fuel price increases and is now feeding through to inflation, with additional pressure from fertiliser costs and contingent supply risks.

1. Currency shock	2. Fuel price impact	3. Inflation pressure	4. Fertiliser impact	5. Residual risk layer
In effect	In effect	Now emerging	Building	Contingent
Rand weakened sharply in March as global risk sentiment deteriorated and USD strengthened. Volatility persists.	April fuel price increases realised. Under-recoveries remain, particularly in diesel. Elevated pricing conditions continue.	Transport and logistics costs rising. Pass-through to goods and services is broadening. Inflation trending toward the upper end of target.	Higher input costs now absorbed by agriculture. Lagged impact on production costs and food prices expected.	Risk of fuel and fertiliser supply disruption remains dependent on duration and intensity of conflict and Hormuz disruption.
March – Ongoing	**April – Ongoing**	**April / May – Q2 2026**	**May – Q3 2026**	**Contingent**
Initial shock absorbed; exposure remains	Price increases in force	Pass-through becoming more visible	Lagged impact on food inflation expected	Dependent on escalation and supply routes

Relative intensity



Medium	High	High	Medium - High	Low - Medium

Key takeaway
The impact is cumulative and persistent. Even if global prices stabilise, the effects already in motion are likely to continue feeding through the economy over the coming months.

Source: BPC Analysis – May 2026

Geopolitical positioning continues to constrain economic flexibility

The Iran war has reinforced existing tensions between South Africa and the United States, with limited evidence of improvement in the bilateral relationship.

South Africa's appointment of Roelf Meyer as ambassador to the United States restores formal diplomatic representation after more than a year, but it does not materially alter the underlying trajectory of the relationship.

Meyer's selection is widely understood as a stabilising move rather than a strategic reset.

His profile as a consensus-driven negotiator aligns with a requirement to manage tensions rather than fundamentally shift positioning.

The objective appears to be the re-establishment of functional engagement, rather than a recalibration of South Africa's external alignment.

Early indications suggest that while diplomatic channels are now formally re-opened, there has been no immediate shift in outcomes. Structural points of tension — including trade pressures, geopolitical divergence, and prior diplomatic friction — remain unchanged.

South Africa's exclusion from key international engagements, including the June 2026 G7 Summit, further reflects this reality.

The country's position remains one of constraint, with limited ability to influence the direction of the relationship in the near term.

Outlook

The economic effects of the Iran war are now embedded within South Africa's operating environment and are likely to persist over the coming months.

The initial shock has transitioned into a sustained period of pressure, characterised by elevated fuel costs, rising inflation, and continued exposure to external volatility.

While some variables may fluctuate, the underlying transmission mechanisms remain in place.

Policy flexibility remains constrained. Fiscal limitations restrict the scope for sustained intervention, while rising inflation limits the ability to ease monetary conditions. As a result, much of the adjustment will continue to be absorbed by businesses and households.

The key uncertainty is no longer whether the impact will materialise, but how long it will persist and how deeply it will entrench within the broader economy.

Even in the absence of further escalation, the effects already in motion are likely to continue feeding through into the second half of the year.

Crime Overview

By Johann Fourie

South Africa: National crime and security environment (February 2026 – May 2026)

The February to May 2026 period reflects a transition from the high-intensity festive season environment into a more stabilised but persistently elevated national crime baseline.

While seasonal spikes in public-space violence and opportunistic crime moderated following January, the underlying structure of South Africa's crime environment remains unchanged, with violent crime, property crime, and organised criminal activity continuing to define operational risk exposure.

Law enforcement activity remained sustained during this period, with Operation Shanela II continuing to deliver high arrest volumes nationally.

However, as observed in previous reporting cycles, intensified enforcement has contributed primarily to disruption rather than structural reduction in crime levels.

The broader threat environment continues to be driven by entrenched socio-economic pressures, organised criminal networks, and established illicit supply chains.

In contrast to the festive cycle, the current period has seen a shift toward more targeted criminal activity, particularly affecting commercial operations, logistics environments, infrastructure corridors, and construction-related sectors.

While large-scale unrest has not defined this period, criminal activity conducted under the guise of protest, community mobilisation, or labour-related action has been observed in multiple provinces, introducing an additional layer of operational risk.

Key indicators
(Feb – May 2026)

Arrests recorded
63,000+
Operation Shanela II
(Feb – May 2026)

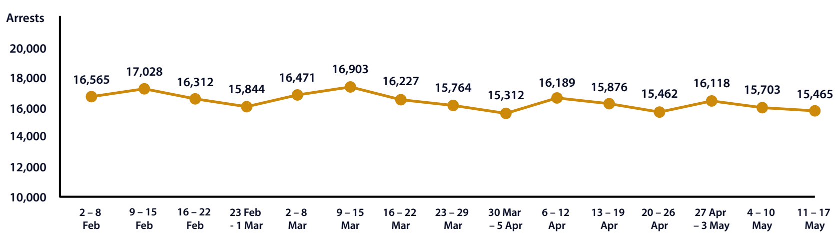
Vehicles recovered
6,800+
Operation Shanela II
(Feb – May 2026)

Firearms seized
3,400+
Operation Shanela II
(Feb – May 2026)

Drug-related arrests
9,700+
Operation Shanela II
(Feb – May 2026)

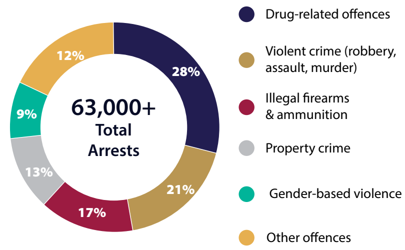
Source: SAPS Operational Reports (Feb – May 2026)

1. Weekly arrests during Operation Shanela II (Feb – May 2026)



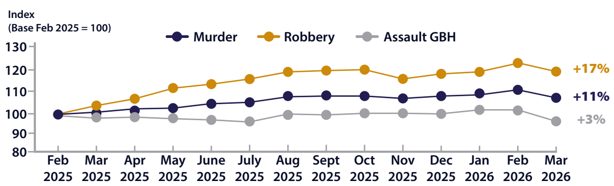
Source: SAPS Weekly Operational Updates (Feb – May 2026)

2. Arrests by crime category (Feb – May 2026)

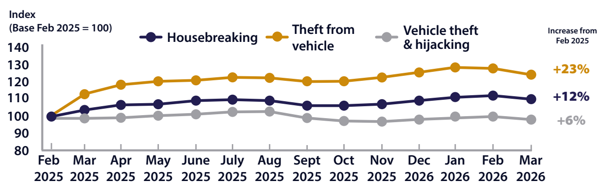


Source: SAPS Operational Reports (Feb – May 2026)

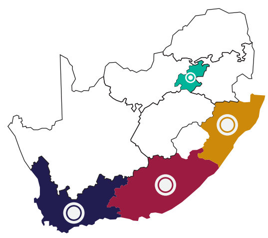
3. Violent crime trend (14-month rolling trend)



4. Property crime & vehicle theft trend (14-month rolling trend)



5. Provincial violent crime hotspots (Feb – May 2026)



Gauteng
High levels of murder, robbery, carjacking and extortion

KwaZulu-Natal
Elevated violence, business robbery, and taxi-related crime

Western Cape
Gang-related violence, house robbery, and commercial theft

Eastern Cape
Murder and armed robbery hotspots in Nelson Mandela Bay and Buffalo City

Source: SAPS Provincial Operational Reports (Feb – May 2026)

6. Crime impact on business (Feb – May 2026)

LOGISTICS & TRANSPORT
Cargo theft, truck hijacking and fuel theft remain significant operational risks.

RETAIL & WHOLESALE
Shoplifting, stock theft and cash-in-transit robberies continue at elevated levels.

CONSTRUCTION & INFRASTRUCTURE
Extortion and disruption linked to organised groups remain persistent.

INDUSTRIAL & WAREHOUSING
Theft of stock, copper cable and equipment targeting remains high.

7. Emerging risk trend

Criminal activity under the guise of protest, community mobilisation or labour action continues to emerge as a recurring pattern across several provinces.

These incidents often mask extortion, disruption or theft-related motives

Key take-outs: National crime environment

- Law enforcement operations remain sustained, with Operation Shanela II continuing to deliver high weekly arrest volumes across multiple crime categories.
- Violent crime remains structurally elevated, although less seasonally amplified than during the festive period.
- Property crime continues to define baseline risk exposure, sustaining broader criminal activity and organised crime funding.
- Organised criminal activity remains active across logistics, infrastructure, and construction sectors, including extortion-linked activity.
- Criminal activity under the guise of protest or community action has emerged as a recurring operational risk factor. Businesses continue to operate in an environment of persistent exposure, requiring ongoing security intervention despite visible law enforcement presence.

National law enforcement operational activity

Law enforcement activity during this period remained sustained and operationally intensive, with SAPS continuing to implement Operation Shanela II as its primary national enforcement framework.

Weekly arrest volumes remained consistently elevated, typically exceeding 15,000 arrests during active operational cycles, reflecting both the scale of criminal activity and the level of coordinated enforcement required to disrupt it.

Operational focus remained aligned to high-impact crime categories, including violent crime suspects, illegal firearms and ammunition seizures, drug-related offences, and wanted suspect tracing.

Gender-based violence enforcement also continued to form a significant component of operational activity, particularly within urban centres.

A notable development during this period has been the continued deployment of the South African National Defence Force (SANDF) in support of SAPS operations in the Western Cape.

This deployment, initially authorised in late 2025 and extended into 2026, involves approximately **1,300–1,500 SANDF personnel** operating in identified gang-affected areas across the Cape Flats.

The deployment has been structured to support SAPS through visibility operations, area stabilisation, and targeted support in high-risk precincts.

Early indicators suggest that the SANDF presence has contributed to short-term stabilisation within specific gang-affected zones, improving enforcement reach and reducing the immediacy of violent incidents in targeted areas.

However, this impact remains geographically concentrated and operationally dependent.

The deployment does not represent a structural shift in national crime trends, but rather a targeted intervention within a specific environment characterised by entrenched gang dynamics.

More broadly, the combined enforcement posture reflects a high level of operational pressure being applied across the national crime landscape.

Arrest volumes, seizures, and visible policing measures indicate continued disruption of criminal activity across multiple categories.

However, these outcomes must be interpreted within the context of underlying structural drivers. High arrest volumes are indicative of both enforcement intensity and persistent criminal activity.

While operations such as Shanela II and SANDF-supported deployments are effective in disrupting activity in the short term, they do not materially alter the conditions that sustain crime, including organised criminal networks, economic pressure, and established illicit supply chains.

The operational environment therefore remains defined by sustained enforcement activity operating against a largely unchanged structural baseline.

As a result, while localised improvements may be observed in specific areas, the broader national risk profile continues to reflect continuity rather than reduction in threat levels.

Violent crime and public-space exposure

Following the festive period, violent crime levels have stabilised from seasonal peaks but remain elevated, particularly within metropolitan and economically active regions.

Public-space exposure continues to affect both individuals and businesses, with robbery, assault, and opportunistic violence remaining persistent across transport nodes, commercial precincts, and high-density urban areas.

While the reduction in seasonal drivers such as holiday movement and alcohol-related activity has moderated peak incident levels, recent developments point to a more complex and evolving threat environment.

The period has been marked not only by continued high-volume violent crime, but also by targeted incidents linked to organised criminal activity.

A notable example is the assassination of a labour lawyer connected to ongoing legal proceedings involving illegal mining networks.

This incident highlights the extent to which organised criminal groups — including those associated with so-called "zama zama" operations — are willing to employ targeted violence beyond traditional criminal environments.

The implications extend beyond the immediate incident, reinforcing concerns around witness intimidation, legal system interference, and the broader reach of organised criminal influence into professional and commercial spheres.

This pattern is supported by broader national indicators. South Africa recorded **over 27,000 murders in the most recent annual reporting cycle,** with crime analysts and SAPS briefings increasingly noting a proportion of these incidents reflecting targeted or "hit-style" characteristics linked to organised criminal activity, extortion, and illegal economic networks.

While these cases represent a subset of overall violent crime, their frequency and visibility have increased, particularly in provinces affected by illegal mining, construction-related extortion, and organised syndicate activity.

At the same time, targeted enforcement interventions continue to influence localised exposure.

The deployment of SANDF resources in support of SAPS operations in the Western Cape has contributed to stabilisation within specific gang-affected areas, particularly across parts of the Cape Flats.

This has supported a reduction in immediate violence within these zones, primarily through increased visibility and enforcement presence.

However, this impact remains geographically contained and operationally dependent.

It does not reflect a broader reduction in violent crime at a national level, but rather a temporary suppression within targeted environments.

Outside of these areas, the underlying drivers of violent crime — including economic pressure, organised criminal networks, and high baseline levels of interpersonal violence — remain unchanged.

Urban centres therefore continue to represent the primary exposure zones. Gauteng, KwaZulu-Natal, Western Cape, and Eastern Cape remain consistently affected, with violence concentrated around transport corridors, informal economic hubs, and densely populated commercial areas.

The combined effect is an environment where violent crime operates across two overlapping layers. The first is a persistent, high-volume baseline of opportunistic and interpersonal violence.

The second is a more structured layer of targeted activity linked to organised criminal networks. Together, these reinforce a risk landscape that is both widespread and increasingly complex to manage.

Property crime: Sustained baseline risk

Property crime continues to represent the most prevalent and structurally significant category within South Africa's crime environment, forming the foundation upon which broader criminal activity is sustained.

Housebreaking, theft, vehicle crime, and commercial theft remain persistent and widespread, affecting both residential and business environments across all major provinces.

Recent national victimisation data indicates that **approximately 1.4–1.5 million households are affected by housebreaking annually**, reinforcing the scale and persistence of property-related crime.

While often treated as lower-impact incidents in isolation, the aggregate effect is significant, sustaining informal markets and providing a consistent revenue stream for both opportunistic offenders and organised criminal networks.

This dynamic is particularly evident in vehicle-related crime. Hijacking and vehicle theft remain closely linked to structured networks operating across Gauteng, KwaZulu-Natal, and Mpumalanga corridors, with established cross-border routes facilitating the movement of stolen vehicles into neighbouring countries such as Mozambique, Zimbabwe, and further into East and Central Africa.

These networks operate with a high degree of coordination, often involving surveillance, rapid vehicle movement, and falsification of identification documentation.

Similarly, commercial theft — including warehouse theft, retail shrinkage, and cargo-related losses — continues to impact business operations.

Logistics and distribution environments remain particularly exposed, with theft occurring both in transit and within storage facilities.

In many cases, these incidents are enabled by a combination of insider involvement, procedural weaknesses, and predictable operational patterns.

Beyond direct loss, property crime plays a critical enabling role within the broader criminal ecosystem.

Stolen goods, fuel, metals, and consumer products are channelled into informal and secondary markets, generating liquidity that supports more complex criminal activities, including armed robbery, extortion, and organised syndicate operations.

The persistence of property crime therefore reflects more than high incident volumes. It represents a continuous and self-sustaining economic layer within the criminal environment, one that is resistant to short-term enforcement disruption and closely linked to both local demand and cross-border trade dynamics.

Organised crime and sector-specific targeting

The current period has been characterised by continued and increasingly structured activity from organised criminal groups operating within specific economic sectors, most notably construction, infrastructure, logistics, and mining.

These activities are no longer isolated incidents, but form part of a broader pattern of coordinated interference in commercial and operational environments.

Extortion-related activity, frequently associated with so-called "construction mafia" groupings, remains a defining feature of the risk landscape.

These groups continue to target development projects, transport operations, and infrastructure sites, using intimidation, disruption, and coercion to secure financial benefit or access to contracts. Reported demands typically range between **10% and 30% of project value**, reflecting a shift from opportunistic disruption to structured, revenue-driven criminal models.

Recent enforcement activity and court proceedings have reinforced the extent of this problem.

Several arrests and ongoing prosecutions linked to construction site disruptions and extortion networks have progressed through regional courts, while the Special Investigating Unit (SIU) continues to probe corruption and irregular procurement linked to infrastructure and municipal projects.

These investigations highlight the intersection between organised criminal activity and procurement vulnerabilities, where extortion, fraud, and collusion increasingly overlap.

Similarly, illegal mining networks ("zama zama") remain active across multiple provinces, including Gauteng, Free State, and North West, contributing to violence, infrastructure damage, and broader criminal activity.

These networks operate as structured syndicates, often involving cross-border participants, illicit firearms, and established supply chains for gold and other minerals.

The ongoing legal proceedings and enforcement actions linked to illegal mining operations continue to reveal the scale and organisation of these networks, including their ability to exert influence beyond mining sites themselves.

This pattern of sector-specific targeting is not limited to construction and mining.

Infrastructure-related criminal activity — including what is increasingly referred to as "water mafia" and service-delivery extortion — has been reported in several municipalities, where contractors and service providers are pressured to make payments or allocate work under threat of disruption.

In some cases, these activities intersect with broader issues of procurement fraud, corruption, and local political dynamics, further complicating enforcement and response.

A consistent feature across these activities is that they are rarely presented as overt criminal operations. Instead, they are frequently positioned under the guise of community mobilisation, labour disputes, or demands for local economic participation.

This allows organised groups to operate within a grey zone between legitimate grievance and criminal intent, complicating both law enforcement intervention and private sector response.

The result is an operational environment in which disruption is increasingly structured, targeted, and economically motivated.

For affected sectors, the risk is not only physical or security-related, but also commercial — impacting project timelines, cost structures, contractual obligations, and overall business continuity.

Cross-border crime and criminal enablement

Cross-border criminal activity continues to play a central role in sustaining and amplifying domestic crime, acting as both a supply mechanism and an economic enabler for organised networks operating within South Africa.

Illicit firearms trafficking remains one of the most critical contributors to violent crime.
Firearms entering the country through regional routes — particularly via Mozambique, Zimbabwe, and, to a lesser extent, Lesotho — continue to supply urban criminal networks.

Law enforcement reporting and periodic seizure data indicate that a significant proportion of illegal firearms recovered in metropolitan areas are either trafficked across borders or diverted from historical stockpiles, contributing directly to the lethality of robbery, hijacking, and gang-related violence.

Vehicle-related crime provides a clear illustration of cross-border enablement.

Hijacking and theft incidents within Gauteng, Mpumalanga, and KwaZulu-Natal are closely linked to established smuggling corridors moving vehicles through border points such as Lebombo, Beitbridge, and informal crossings into Mozambique, Zimbabwe, and further north.

Industry and law enforcement estimates consistently indicate that **a substantial share of hijacked vehicles — often in excess of 50% in certain categories — are not recovered**, reflecting the efficiency of these export-driven networks and the speed at which vehicles are moved out of the country.

Drug trafficking networks similarly reinforce organised crime sustainability.

South Africa remains both a transit and destination market for narcotics moving along regional and international routes, including cocaine flows from Latin America via West and East Africa, as well as heroin and synthetic drugs entering through southern and eastern corridors.

These networks generate significant revenue streams, which in turn support other criminal activities, including extortion, illegal mining operations, and violent crime.

The interaction between these cross-border flows and domestic crime is increasingly evident. Firearms, vehicles, and narcotics do not operate in isolation, but form part of an integrated criminal economy in which supply chains, distribution networks, and local enforcement gaps are closely linked.

This allows organised groups to operate with a level of resilience that is difficult to disrupt through localised enforcement alone.

As a result, South Africa's crime environment cannot be understood purely within national boundaries.

Local incidents — whether violent crime, property crime, or sector-specific targeting — are frequently supported by regional infrastructure, enabling rapid movement of goods, weapons, and individuals across borders.

This reinforces the persistence of organised crime and limits the effectiveness of interventions that do not account for these broader dynamics.

Crime impact on business and commercial environments

Businesses during this period have continued to operate within a persistently elevated risk environment, where exposure is not defined by isolated incidents but by the cumulative effect of multiple, overlapping threat vectors. While increased law enforcement visibility provides a degree of deterrence, it has not materially reduced underlying exposure.

Theft, robbery, fraud, and operational disruption remain consistent features across the commercial landscape, particularly in environments characterised by high movement, asset concentration, and predictable activity.

This is most evident within logistics and transport operations, where theft and hijacking incidents continue to affect both long-haul and last-mile distribution.

The combination of route predictability, cross-border vehicle demand, and the presence of organised networks creates sustained exposure, with losses extending beyond assets to include delays, contractual penalties, and reputational impact.

Retail environments remain similarly exposed, with shrinkage, opportunistic theft, and targeted robbery continuing to affect both standalone stores and large-format shopping centres.

While physical security measures provide some mitigation, the scale and frequency of incidents continue to place pressure on operating margins, particularly in high-density urban areas.

Within construction and infrastructure sectors, the impact is more structural. Extortion-linked disruption, project interference, and coercive demands introduce uncertainty into project execution, often resulting in delays, increased security costs, and in some cases, suspension of operations.

These risks are further compounded by the intersection with procurement processes and local stakeholder dynamics, making mitigation more complex than traditional security interventions.

Industrial and warehousing environments continue to experience a combination of external and internal risk.

Theft of goods, fuel, and materials is often enabled by insider involvement or procedural gaps, while organised groups exploit predictable loading, storage, and dispatch cycles.

In these environments, loss is rarely attributable to a single event, but rather to sustained leakage over time.

What has become more apparent during this period is the convergence between conventional crime and structured criminal interference.

Businesses are increasingly required to manage not only opportunistic incidents, but also targeted activity linked to organised networks, including extortion, disruption, and supply chain interference.

The practical implication is that crime is no longer a peripheral risk. It has become an operational variable that directly affects cost structures, planning assumptions, and the ability to maintain continuity.

As a result, the distinction between security management and operational management continues to narrow, with risk mitigation requiring a more integrated and proactive approach.

Risk Outlook interpretation

The February to May 2026 period reinforces that South Africa's crime environment remains structurally elevated, with limited indication of sustained reduction despite continued high levels of enforcement activity.

While operations such as Shanela II and targeted interventions have contributed to measurable disruption, they have not materially altered the underlying conditions that sustain crime.

Organised criminal capability, supported by cross-border supply chains and reinforced by persistent economic pressure, continues to drive activity across both high-volume and targeted categories.

What is more evident during this period is not an increase in crime alone, but a shift in how it manifests.

Alongside the persistent baseline of property and violent crime, there is a growing presence of structured, sector-specific activity — including extortion, organised theft, and targeted disruption — particularly within construction, logistics, and infrastructure environments.

These activities are increasingly coordinated, economically motivated, and embedded within broader commercial dynamics.

This introduces a more complex risk profile. Crime is no longer confined to opportunistic incidents, but operates across multiple layers, combining volume-driven activity with targeted interference.

For businesses, this translates into exposure that is both continuous and variable, affecting not only physical assets but also operations, timelines, and commercial decision-making.

The practical implication is that crime risk can no longer be treated as a series of isolated events. It has become an operational condition that must be managed as part of the broader business environment.

This requires a shift away from reactive security measures toward more integrated, intelligence-led approaches that align visibility, response, and operational planning.

In this context, the ability to understand how exposure develops — across movement, infrastructure, and sector-specific dynamics — becomes as important as the ability to respond to incidents themselves.

Unrest Outlook

National protest, civil disruption and operational stability assessment South Africa: February 2026 – May 2026

South Africa's unrest environment during the February to May 2026 period has remained consistent with the country's established pattern of high-frequency, localised protest activity, rather than widespread systemic civil instability.

The operating picture reflects a continuation of the national protest baseline, where demonstrations, marches, and service delivery-related mobilisation occur regularly across metropolitan and peri-urban environments.

While the intensity associated with the post-festive surge has moderated slightly, overall protest activity has remained elevated, supported by persistent socio-economic pressure, infrastructure constraints, and labour-related mobilisation.

The environment remains characterised by volume rather than scale, with most incidents contained geographically and limited in duration, but collectively generating sustained operational disruption.

Importantly, while large-scale unrest has not materialised during this period, several incidents have demonstrated the continued potential for escalation, particularly where political dynamics, labour disputes, or criminal opportunism intersect with protest activity.

Key indicators (Feb – May 2026)

Operational impact Is widespread
Workforce mobility and logistics remain the most affected

Access disruption continues
Road closures, route deviations, restricted access

Business impact is significant
Cost pressure, SLA risk and continuity risk remain elevated

High-frequency protest activity
Elevated baseline persists

Source: SAPS Operational Reports (Feb – May 2026)

1. Unrest intensity overview (Feb – May 2026)

Elevated but stable

High-frequency, localised incidents. Disruption risk remains continuous.

It primarily affects movement, access, logistics, workforce mobility and operational continuity.

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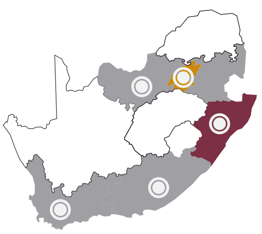
Source: SAPS Operational Reports (Feb – May 2026)

2. Geographic hotspots (Feb – May 2026)



Gauteng
Primary node of protest activity

KwaZulu-Natal
Secondary hotspot.

Mpumalanga
Ongoing secondary cluster.

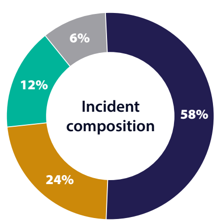
North West
Ongoing secondary cluster.

Western Cape
Ongoing secondary cluster.

Eastern Cape
Ongoing secondary cluster.

Source: SAPS Provincial Operational Reports (Feb – May 2026)

3. Composition of activity (Feb – May 2026)



- Structured protest action (e.g. roadblocks, shutdowns, service delivery protests)
- Marches, demonstrations and pickets
- Civil unrest / looting / infrastructure damage
- Other incidents

Source: SAPS Operational Reports (Feb – May 2026)

4. Key drivers of unrest

Service delivery pressure

Water, electricity, waste management and municipal responsiveness remain the primary triggers.

Labour & economic pressure

Wage disputes, Section 77 processes, cost-of-living stress and unemployment sustain the baseline.

Political Flashpoints

Developments such as the Julius Malema sentencing fallout have shown that political triggers can rapidly intensify alert levels, even where large-scale unrest does not materialise.

5. Business impact (Feb – May 2026)

Movement disruption
Road closures and route deviations affect logistics and transport.

Access restrictions
Sites, depots and commercial precincts face intermittent blockages.

Workforce mobility
Delays, rerouting and inability to access work locations.

Operational continuity
Delays, reduced throughput and rescheduling increase costs.

Commercial impact
Cost pressure, SLA risk and continuity risk remain elevated.

6. Forward outlook (Feb – May 2026)

Large-scale destabilisation remains unlikely.

Frequent localised disruption remains highly likely.

Operational planning should assume continued protest activity across key economic regions.

Monitoring of service delivery, labour developments and political flashpoints remains critical.

7. What this means for business?

Unrest in the current environment is best understood as a continuous disruption condition rather than a contingency event.

It primarily affects movement, access, logistics, workforce mobility and operational continuity.

Impacts are concentrated in specific nodes and corridors but can cascade across supply chains.

Proactive risk management, scenario planning and real-time monitoring remain essential.

Businesses should maintain flexible operating models and contingency plans for disruption to movement and access.

Source: SAPS Operational Reports, Industry Reports, Media Monitoring, Intelligence Assessments (Feb – May 2026)

ThreatInsights alert trend analysis

ThreatInsights data indicates that the elevated protest levels observed during January and February have persisted into the current reporting period, albeit with a gradual stabilisation rather than a sharp decline.

During the November 2025 to February 2026 cycle, protest-related alerts increased from **28 incidents in November to a peak of over 160 alerts in February**, reflecting a sustained escalation through the festive and post-festive period.

Analysis of February through April data indicates that while this peak has not continued to rise, alert volumes have remained consistently elevated, typically ranging between **140 and 170 protest-related alerts per month**, confirming the persistence of disruption risk rather than a return to pre-festive baselines.

The earlier upward trend — driven by post-festive economic pressure, municipal service delivery failures, and labour mobilisation — has therefore transitioned into a sustained operational baseline.

Alert volumes remain concentrated within high-density economic provinces, with **Gauteng and KwaZulu-Natal consistently accounting for the majority of recorded incidents**, often representing more than half of total national protest alerts in any given month.

This distribution reflects both population density and economic centrality, but also the concentration of infrastructure, logistics networks, and government institutions, all of which act as focal points for mobilisation.

The data further confirms that protest activity is no longer strictly cyclical in the traditional sense.

While seasonal peaks remain evident, the underlying baseline has shifted upward, with overlapping drivers sustaining a **continuous level of protest activity across the reporting period**.

This results in an operating environment where disruption is not episodic, but persistent, with multiple incidents occurring concurrently across regions.

Adverse weather-related disruptions, while not unrest in themselves, have continued to act as secondary catalysts.

During the February to April period, weather-related alerts remained present, contributing to infrastructure instability, flooding in certain areas, and service delivery interruptions. These conditions have been directly linked to protest mobilisation in affected municipalities, particularly where water supply, sanitation, or road infrastructure has been impacted.

The interaction between environmental disruption and existing service delivery pressure reinforces a compounding effect, where grievances are intensified rather than isolated.

As a result, protest activity during this period reflects not only direct socio-economic drivers, but also the amplification of those drivers through infrastructure and environmental stress.

Nature and composition of protest activity

The composition of protest activity during this period remains broadly consistent with established patterns, with structured protest action continuing to dominate the overall incident profile.

Analysis of ThreatInsights data from the preceding reporting cycle indicates that **protest actions accounted for approximately 65%–70% of all recorded incidents**, with the balance comprising marches, demonstrations, and pickets.

This distribution has remained largely unchanged into the current period, confirming that the majority of activity is organised rather than spontaneous.

This structured nature reflects coordinated mobilisation around defined grievances, including service delivery failures, labour disputes, and localised socio-economic pressure.

In many cases, these protests are planned, communicated in advance, and geographically contained, which contributes to their generally short duration and limited direct escalation.

However, the operational risk is shaped less by the form of protest itself and more by its interaction with the surrounding environment.

Even controlled or peaceful protest activity continues to generate disruption through road closures, access restriction, and interruption of normal movement, particularly where incidents occur along key transport corridors or within commercial zones.

While incidents involving civil unrest, looting, or infrastructure damage remain limited in proportion — typically representing less than 5% of total recorded protest-related activity — their impact is disproportionately significant.

These events tend to emerge under specific conditions, particularly where protest activity intersects with opportunistic criminal behaviour or where crowd dynamics shift rapidly beyond initial intent.

Recent incident patterns indicate that escalation is more likely in environments where multiple risk factors converge, including:

- High population density
- Pre-existing socio-economic tension
- Weak or delayed local response capability
- Presence of opportunistic criminal elements

In such cases, the transition from structured protest to disruptive unrest can occur rapidly, often without clear warning indicators at the outset of the event.

The practical implication is that the distinction between protest and unrest is not always defined at the point of mobilisation, but rather by how conditions evolve during the incident.

As a result, even low-intensity protest activity must be assessed within a broader risk context, particularly in environments where escalation pathways are already present.

Geographic distribution and operational hotspots

Protest activity during the reporting period remains geographically concentrated within South Africa's primary economic regions, with a clear and consistent weighting toward Gauteng and KwaZulu-Natal.

ThreatInsights data indicates that **Gauteng continues to account for the largest share of protest-related incidents, typically contributing between 35% and 45% of total national alerts** in any given month.

This reflects the province's economic centrality, population density, and concentration of government institutions, all of which make it a focal point for labour mobilisation, service delivery protests, and broader socio-economic action.

KwaZulu-Natal remains the second most active province, generally accounting for **15% to 25% of recorded incidents**, with activity driven by a combination of service delivery challenges, municipal instability, and established patterns of mobilisation.

The province's history of coordinated protest action, combined with ongoing infrastructure and governance pressures, sustains its position as a consistent secondary hotspot.

Additional activity has been observed across Mpumalanga, North-West, Western Cape, and Eastern Cape, typically contributing smaller but operationally relevant volumes of incidents.

In these provinces, protest activity is more localised in nature, often linked directly to specific service delivery failures, infrastructure breakdowns, or community-level grievances.

The geographic distribution also reflects the concentration of protest activity along key economic and transport corridors. Incidents are frequently recorded:

- Along major arterial routes and highways
- In proximity to municipal offices and service delivery points
- Within industrial zones, logistics hubs, and commercial precincts

This spatial pattern reinforces the operational relevance of unrest risk. While incidents may be localised, their impact extends beyond the immediate area through disruption of movement, access, and supply chain continuity.

In practical terms, provinces with the highest economic activity also carry the highest disruption risk, not necessarily because of the scale of protest, but because of the critical infrastructure and commercial activity concentrated within those areas.

Key drivers of protest activity

The underlying drivers of protest activity during this period remain consistent, but their interaction has become more complex, particularly where political and socio-economic dynamics overlap.

Service Delivery Pressure

Service delivery-related grievances remain the primary trigger for protest mobilisation and continue to account for the majority of recorded incidents.

ThreatInsights categorisation indicates that **well over half of all protest alerts are directly linked to service delivery failures**, with water supply, electricity reliability, and municipal responsiveness as the dominant issues.

Water infrastructure failures have emerged as a particularly persistent catalyst.

National reporting continues to highlight **significant non-revenue water losses (exceeding 40% in some municipalities)** and recurring supply interruptions, which have translated into sustained protest activity across Gauteng, North West, and parts of the Eastern Cape.

In several instances, disruptions to water supply have resulted in repeated protest cycles within the same communities, indicating unresolved underlying conditions rather than isolated events.

Electricity-related grievances, while less dominant than during peak load-shedding cycles, remain a secondary trigger, particularly where outages intersect with broader service delivery failures.

Labour Mobilisation and Economic Pressure

Labour-related protest activity has remained a consistent feature during this period, reflecting ongoing wage negotiations, public-sector pressure, and broader economic strain.

Section 77 protest mechanisms continue to provide a formalised channel for mobilisation around socio-economic conditions, particularly within urban centres.

Recent months have seen continued protest activity linked to public-sector wage negotiations and utility-related labour dynamics, including Eskom-associated labour pressure.

While most actions remained structured and contained, they contributed to elevated disruption risk, particularly where protests occurred near strategic infrastructure or transport routes.

Economic pressure continues to underpin the broader protest baseline. Rising transport costs, driven in part by fuel price increases, combined with high unemployment and cost-of-living constraints, sustain conditions for mobilisation.

These factors do not always act as direct triggers, but they increase the likelihood, frequency, and persistence of protest activity across affected communities.

Political Catalysts and Escalation Risk

A notable feature of the current period has been the role of political developments in influencing protest risk, particularly as amplifiers rather than primary drivers.

The sentencing of Economic Freedom Fighters (EFF) leader Julius Malema introduced a clear potential flashpoint, with heightened rhetoric, mobilisation indicators, and increased alert levels across key urban centres.

Threat monitoring during this period reflected **elevated alert activity and increased monitoring of known mobilisation nodes**, particularly in Gauteng and KwaZulu-Natal.

While large-scale unrest did not materialise, the associated activity — including gatherings, protest rhetoric, and localised demonstrations — highlighted the sensitivity of the unrest environment to political triggers.

The limited escalation observed reflects both the absence of broader systemic catalysts and the contained nature of mobilisation.

However, the incident reinforces an important dynamic: political developments can rapidly elevate baseline protest risk, particularly where they intersect with existing socio-economic grievances.

In such conditions, mobilisation can shift from structured protest to broader disruption within a short timeframe.

Operational risk implications for businesses

The primary impact of unrest during this period continues to be disruption rather than direct targeting, but the scale and frequency of these disruptions remain operationally significant.

ThreatInsights reporting indicates that protest-related incidents consistently affect **major transport routes, arterial roads, and access points to industrial and commercial areas**, with an average of **multiple daily incidents nationally** during peak periods.

These events result in road closures, route obstruction, and restricted access, directly affecting logistics, distribution, and workforce mobility.

Recent incident patterns have included:

- Road blockades using burning tyres and debris along key routes in Gauteng and KwaZulu-Natal
- Protest activity near municipal facilities and industrial zones disrupting access control
- Localised demonstrations affecting transport corridors servicing logistics and retail operations

Secondary risks continue to emerge in proximity to protest activity.

These include intimidation at access points, interference with business operations, and opportunistic criminal behaviour.

In several instances, protest events have coincided with or provided cover **for theft, looting of goods in transit, and targeted disruption within logistics environments**, reinforcing the overlap between unrest and criminal activity.

The cumulative effect of these incidents is operational rather than episodic.

While individual protests are often short in duration, their frequency and geographic spread result in sustained disruption across multiple sectors.

The increasing convergence between protest activity and criminal opportunism reinforces the need to assess unrest not only as a social or political phenomenon, but as a continuous operational risk factor with direct implications for business continuity, planning, and response capability.

Forward outlook

The unrest outlook for the coming period remains elevated, but structurally stable, reflecting the continuation of South Africa's established protest baseline rather than indicators of widespread destabilisation.

What is more likely is not a reduction in activity, but a continuation of sustained, high-frequency protest incidents occurring across multiple regions concurrently.

The data trend indicates that protest activity has stabilised at a higher baseline than in previous cycles, suggesting that disruption will remain a consistent feature of the operating environment rather than an episodic occurrence.

Protest activity is expected to remain concentrated within major metropolitan provinces, particularly Gauteng and KwaZulu-Natal, where population density, economic activity, and service delivery pressures intersect.

These regions will continue to represent the highest likelihood of disruption, particularly along key transport corridors and within industrial and commercial zones.

The primary drivers of mobilisation — service delivery failures, labour-related pressure, and broader economic strain — are unlikely to ease in the near term.

As a result, protest activity is expected to remain persistent, with localised incidents occurring in response to specific triggers rather than a single unifying national catalyst.

Political developments will continue to act as escalation multipliers rather than primary drivers.

Events such as the recent sentencing of Julius Malema have demonstrated the sensitivity of the environment to political triggers, even where large-scale mobilisation does not materialise.

Similar developments may result in short-term spikes in activity, particularly within urban centres, but are unlikely to translate into sustained national unrest in the absence of broader systemic conditions.

From an operational perspective, the risk profile remains defined by disruption.

The cumulative impact of frequent, localised incidents — including road closures, access restriction, and interference with movement — will continue to affect logistics, workforce mobility, and business continuity.

The practical implication is that unrest must be managed as a continuous operating condition rather than a contingency scenario.

This requires sustained visibility of protest activity, adaptive planning aligned to transport and access routes, and coordinated response capability to mitigate disruption as it occurs.

Spotlight On: Executive and personal security in South Africa - Operating in a visible and targeted environment

Introduction

South Africa's security environment continues to evolve in ways that extend beyond infrastructure and asset protection. Increasingly, individuals themselves have become the focal point of criminal attention — not randomly, but through patterns of visibility, predictability, and perceived value.

This shift is not theoretical. It is reflected in the broader crime environment and in the growing intersection between violent crime, extortion, intimidation, and organised criminal activity.

While kidnapping statistics provide one measurable indicator of escalation, they represent only one component of a wider pattern that includes coercion, targeted disruption, and criminal pressure linked to operational and commercial environments.

Key drivers for activating CPO & journey management services

These dynamics are increasingly visible across sectors such as construction, logistics, mining, infrastructure development, and transport, where individuals — rather than physical assets — become the pressure point through which influence, access, movement, or financial gain is pursued.

At the same time, South Africa's operating environment is reshaping how organisations interpret their responsibility toward employee and executive safety.

What was historically viewed as a discretionary security measure is increasingly being framed within the context of Duty of Care and Corporate Responsibility.

Importantly, this obligation is not limited to executives or high-profile individuals.

Exposure increasingly extends to employees required to:

- Travel frequently
- Operate across multiple sites
- Engage with stakeholders externally
- Work within economically or operationally contested environments
- Move predictably between locations

This introduces a significant shift. Executive and personal security is no longer solely a personal decision taken at individual level.

It is increasingly becoming part of governance, operational resilience, employee wellbeing, and business continuity.

The implication is clear. The risk landscape is no longer confined to where organisations operate — it is increasingly defined by how their people move within that environment.

Operating environment and exposure dynamics

The structure of targeted criminal activity in South Africa provides important insight into how individual exposure develops.

While kidnapping statistics offer a measurable indicator of escalation, they represent only one component of a broader pattern that includes extortion, coercion, intimidation, and targeted disruption linked to organised criminal activity.

These activities are frequently associated with structured criminal networks operating across sectors where individuals — rather than assets — become leverage points through which operational or financial pressure can be applied.

Within this broader environment, the overlap with traditional violent crime remains significant.

A substantial proportion of kidnapping incidents continue to occur in conjunction with hijackings and robbery-related activity, reinforcing a key operational reality.

Movement, rather than location, is often the point of highest vulnerability

It is within this dynamic that misconceptions around executive protection continue to persist. Popular perception, often shaped by media portrayal, associates close protection with visible "bodyguard" presence reserved for politicians, celebrities, or ultra-high-net-worth individuals.

The operational reality is considerably broader.

Executive and personal security is increasingly relevant within corporate and commercial environments where individuals operate visibly, travel frequently, engage across multiple operational locations, or function within sectors exposed to organised criminal pressure.

Transit environments illustrate this most clearly. Commuting routes, airport transfers, inter-site travel, and routine business movement introduce conditions that are consistently exploitable.

Individuals become predictable in their movement, temporarily isolated from controlled environments, and dependent on route and timing.

Within this routine, exposure develops incrementally. Routes become known.

Timing becomes consistent. Behaviour becomes observable. What appears stable operationally becomes predictable externally.

At the same time, organised criminal actors are becoming increasingly structured in how they identify and exploit exposure.

Whether linked to extortion networks, construction disruption groups, illegal mining syndicates, or broader organised criminal activity, these groups increasingly operate with surveillance capability, coordination, and targeted intimidation designed to influence movement, contracts, operational continuity, or commercial decision-making.

The broader operating environment continues to amplify these risks.

Traffic congestion creates predictable choke points. Load-shedding and infrastructure instability reduce visibility and disrupt operational continuity.

Communication delays affect response coordination.

These factors do not create the threat, but they consistently create conditions that support execution once exposure has been established.

Overlaying this is the information environment. Individuals are more visible than at any point historically through business activity, digital presence, and social behaviour.

Fragmented information, when aggregated, provides sufficient insight to support surveillance and targeting.

The result is a landscape where exposure is rarely immediate. It develops over time through movement, routine, visibility, and predictability.

Within this context, the effectiveness of protection lies not in reacting to the moment of threat, but in understanding and managing the conditions that allow that threat to develop in the first place.

Integrated executive protection and secure mobility

The way in which executive and personal security is applied in South Africa has evolved alongside the broader threat environment, moving away from a narrow focus on visible protection toward a more integrated understanding of how exposure develops operationally.

Historically, close protection was largely associated with visible presence — a trained individual positioned to intervene when an incident occurs.

While this remains an important capability, it no longer reflects the full operational requirement within an environment where risk develops progressively through movement, routine, visibility, and operational exposure.

This shift has direct implications from a corporate governance perspective.

Where employees are required to operate across multiple environments within visible or predictable movement patterns, the management of that exposure increasingly forms part of an organisation's Duty of Care obligations.

The question is therefore no longer whether protection is required exclusively for executives, but whether exposure across the broader workforce has been adequately identified, assessed, and managed.

Within this context, movement itself is increasingly treated as a controlled risk environment.

Secure mobility extends beyond transport into:

- Route planning and variation
- Threat-informed movement
- Dynamic adjustment to changing conditions
- Journey oversight and escalation capability
- Coordinated operational response

Journey management further strengthens this approach by introducing structure before movement begins.

Threat assessments, route analysis, venue considerations, and movement planning ensure that exposure is understood rather than encountered reactively.

Once movement is underway, real-time visibility and communication become critical.

Continuous monitoring, escalation capability, and coordinated operational oversight allow emerging risks to be identified and managed before they develop into incidents.

Within this environment, the role of the Close Protection Officer remains central, but forms part of a wider operational ecosystem incorporating secure mobility, intelligence support, monitoring capability, and coordinated response structures.

At BPC, executive and personal security services are aligned to this integrated operating model rather than functioning as standalone protection resources.

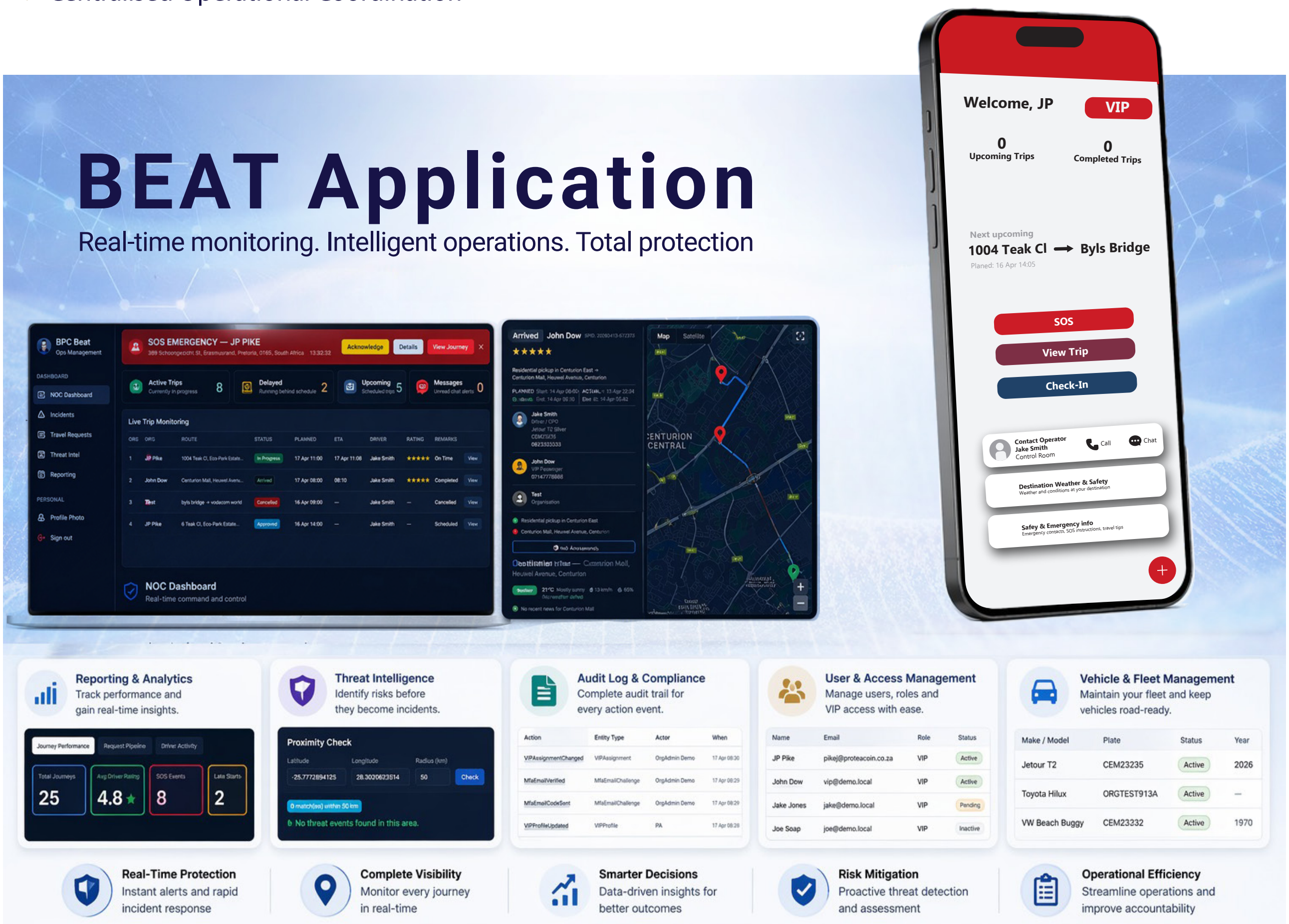
This operational capability incorporates:

- Close Protection Officers
- Security Drivers and Secure Mobility Services
- Airport Transfers and Executive Transportation
- Journey Management and Monitoring
- Tactical Response Capability
- Intelligence and Threat Monitoring Support
- Centralised Operational Coordination

A significant development within this environment has been the introduction of BEAT, BPC's internally developed and wholly owned Journey Management platform.

Developed as part of BPC's broader digital transformation strategy, the platform was designed specifically to address the growing requirement for structured, technology-enabled secure mobility and journey oversight within South Africa's operating environment.

Rather than functioning simply as a booking or transport application, BEAT introduces a controlled operational layer into how executive and personal security services are coordinated, monitored, and managed.



The platform enables Personal Assistants, operational coordinators, executive support staff, and protection teams to structure and manage complex movement requirements through a single environment capable of supporting:

- Multi-leg journey planning
- Approval workflows and movement authorisation
- Vehicle allocation and driver coordination
- Journey monitoring and escalation capability
- Structured communication and operational visibility
- Centralised reporting and oversight

Importantly, BEAT is integrated into BPC's broader operational infrastructure and is supported through a dedicated VIP and Journey Management Desk operating within the BPC Super NOC environment.

This introduces continuous operational visibility and centralised coordination capability across executive movement activities, ensuring that journey oversight, communication, escalation, and response remain aligned throughout the movement lifecycle.

The integration between secure mobility resources, the BEAT platform, and the Super NOC environment allows movement activity to be monitored and coordinated in real time, significantly improving situational awareness and operational responsiveness where conditions change or elevated-risk scenarios emerge.

This introduces a level of operational structure and flexibility that reflects the reality of how executive and personal security is increasingly required in practice.

Not all exposure is constant, and not all personnel require permanent dedicated protection resources.

The ability to structure services proportionately — whether for executive movement, airport transfers, project travel, site visits, international visitors, or elevated-risk engagements — allows organisations to align protection capability directly to operational exposure while maintaining oversight and governance.

The model is further strengthened through BPC's broader operational capability, incorporating intelligence support, tactical response resources, surveillance capability, national operational coordination structures, and integrated communication environments capable of supporting both routine and elevated-risk scenarios.

Within complex environments such as high-profile engagements, infrastructure projects, or operationally contested sectors, executive and personal security increasingly forms part of a wider risk management framework incorporating access control, crowd management, route monitoring, emergency response, and operational continuity planning.

The emphasis therefore shifts away from visible protection measures and toward controlled exposure management — where movement, visibility, communication, and operational response are managed through a coordinated and intelligence-led environment rather than through reactive intervention alone.

Strategic insights

The available data, when considered alongside operational experience, reinforces several consistent realities within the current environment.

Movement continues to represent the most consistent point of vulnerability.

The combination of predictability, environmental conditions, timing, and visibility creates exposure that is repeatedly exploited within both opportunistic and structured criminal activity.

At the same time, organised criminal capability continues to evolve. Extortion-linked activity, intimidation, targeted disruption, and coercive criminal pressure increasingly reflect structured targeting supported by prior observation, coordination, and operational planning.

Importantly, these dynamics are no longer isolated to executives or high-profile individuals.

Exposure increasingly extends across broader employee environments where movement, visibility, and operational positioning intersect.

This is driving a significant shift in how organisations interpret Duty of Care responsibilities.

Executive and personal security is increasingly moving beyond discretionary decision-making into structured risk management, operational resilience, and governance accountability.

The practical implication is that protection is becoming less about visible security presence and more about operational control — control over movement, exposure, communication, and response capability within dynamic operating environments.

Outlook

South Africa will continue to present a complex and adaptive risk environment for individuals operating within corporate, private, and international contexts.

The nature of risk is expected to become increasingly influenced by the ability of external actors to interpret movement, behaviour, visibility, and access patterns over time.

This places greater emphasis on how organisations understand and manage exposure across their operations.

At the same time, the capability available to manage these risks is evolving rapidly through the integration of intelligence, technology, secure mobility, and coordinated operational oversight.

For organisations, this introduces a broader responsibility to view executive and personal security as part of an integrated Duty of Care framework linked to continuity, governance, employee wellbeing, and operational resilience.

For individuals, it requires greater awareness of how exposure develops — not at isolated moments, but continuously through movement, routine, and visibility.

As with broader security trends in South Africa, the requirement is not to eliminate risk entirely, but to manage it with structure, awareness, and control.

Main Contributors

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The Political and Economic Section features expert insights from Marisa Lourenço, an independent risk consultant based in Johannesburg, South Africa. Marisa specialises in country risk analysis and due diligence investigations for multinational corporations, including Fortune 500 companies, operating across sub-Saharan Africa. Her assessments are regularly featured in both local and international media.

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