

**Geollect Comment:** Considering some rather uniformed media commentary, before the missile attacks on the coalition bases in Iraq. And while we have now seen at least the start of the Iranian response, the analysis remains valid. For the internal audience, last night's action would have been highly visible, (the Tehran TV channels will be full of clips of multiple missiles launches) and were seen to be a deliberate and direct action by the Iranian leadership. The targets were well chosen; large relatively remote air bases in Iraq holding coalition forces.

These bases have been regularly targeted over a number of years by various different Iraqi based factions, largely using tactical rockets, generally with minimal damage. The missiles used in this attack would have been much larger Scud Short Range Ballistic Missile variants, launched from Iranian soil, which also helped the Regime narrative, but with little chance of causing significant damage.

These are area weapons, fairly inaccurate and with a relatively small payload, and the risk calculation for the Iranian leadership would have been made with this in mind. Had any missiles hit coalition eating or sleeping facilities, we would be in a different place now, but the chances of that were low. The secondary message that firing these missiles from Iran would have sent is the Regime's ability to hit targets well outside of the Iranian direct sphere of influence. The Iranian ballistic missile programme is extensive and includes variants of much greater range than those employed last night. So these attacks were as much a warning to the US and its allies as an action of retaliation.

While it would be foolish to think that this draws a line under the latest crisis, the political rhetoric does suggest a de-escalation, although limited proxy activity is likely to continue. The seemingly coincidental Ukrainian International Airlines crash shortly after taking off from Tehran is an interesting (and tragic) one. Being widely reported as potential engine failure, there remains an outside possibility of an error by the Iranian Air Defence Forces, which would have been on high alert in anticipation of a US retaliatory air strike.

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**The Iranian Crisis - What is really at stake?** As the media hype surrounding the killing of Qassim Soleimani goes into overdrive, it is worth reminding ourselves of the strategic context and noting that there are far greater strategic issues at stake than individual world views, sensational headlines, and internal national political point scoring. Ultimately this is just another move, albeit a highly significant one, in the continuing competition for geo-political dominance in the gulf region. The action taken by the US was indeed a bold move and represents a significant escalation in the regional dynamic but to suggest that the event is a precursor to global conflagration is, for now anyway, a step too far. The potential for strategic miscalculation is always there of course, but when considering what each stakeholder wants and needs, an escalation into direct conflict between the US and Iran is less likely than some would have us believe.

**IRANIAN STRATEGIC CONTEXT:** The primary aim of the Iranian Regime ever since the Islamic revolution of 1979 has been two-fold; to maintain the survival of the Regime and to be seen as the custodian of the Shia faith. The two are intrinsically linked and both have an internal and external dynamic, which require a carefully balanced diplomatic, military and economic approach. Iran is a divided country with those who believe in and fully support the revolution, including the robust mechanisms in place to maintain its absolute power, and those who seek a more plural and open society in which the people have a much greater say in how they are governed. While in the West we like to convince ourselves that the latter are the silenced majority just waiting for an opportunity to overthrow the evil regime, the truth is more nuanced. Having been indoctrinated over decades about the threat by the US and its Allies and Israel to the existence of the Iranian revolution, events like Soleimani's death reinforce this message.

At the height of the ISIL expansion into Iraq and Syria following the announcement of the 'Caliphate' I. If you challenged some on the Iranian expansionist policy and the IIRCG expeditionary footprint. Academic response was interesting. 'What you in the West don't understand is that in Iran we are geographically surrounded by those who would put at risk our way of life and our beliefs. Syria and Iraq therefore represent our strategic depth, without which the threat would be right on our border. We actually believe in our revolution and will do whatever it takes to defend it'. And while their expressed views are clearly a rehearsed one and in no way excuses the methods adopted by the Quds Force and other executive security agents of the State, it is at least an understandable internal narrative and in part accounts for the Soleimani strategy.

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Geopolitically, Iran does see itself as being hemmed in by potential adversaries. To the East is an Afghanistan viewed as a US occupied state, to the South the Sunni dominated Kingdom of Saudi Arabia (KSA), and to the West an unstable and vulnerable Iraq. And it is far more complex than the much-rehearsed Sunni v Shia schism, with the Iranian desire for regional dominance against its long-term Sunni competitor, KSA, a key strategic aim.

**WHAT HAPPENS NEXT – A CALIBRATED RESPONSE?** The Iranian Regime is now faced with an extremely challenging conundrum. Internally, it must be seen to retaliate in a way that will satisfy its own population (both supportive and otherwise). However, whereas in the past a media savvy tit-for-tat proportionate action would satisfy the need for a response, two elements make this approach more difficult now. Regardless of the driver that triggered the air strike, the action itself represents a significant escalation. Soleimani was a national hero, well known to the population and one of the most senior decision-makers in the Regime. And while his death will not be universally mourned in the country, the impact on the nation's psyche will be considerable. A key question for the Regime will be to determine what is proportionate and will not trigger an escalatory of counter-response. Which speaks to the second element, that of an unpredictable opponent. For so long, the US and its allies have followed a cautious defence diplomacy route. Military actions have generally been preceded by significant diplomatic activity, unambiguous messaging and a long and very visible build-up to military action. We have become highly predictable. Opponents have needed just to follow the western media to determine their next course of action. While President Trump's approach may be open to criticism, his willingness to act swiftly and unexpectedly has put the element of surprise back into defence diplomacy. Effective brinkmanship relies on keeping your opponent off balance and uncertain of what you will do next. A miscalculation by the Iranian leadership therefore has the potential to result in a serious escalation that could ultimately lead to the fall of the Regime.

Despite the developments in Iranian military capability in recent years, their conventional forces are no match to the might of the US and going toe to toe would put the existence of the Iranian state in its current form at extreme risk. The use of regional proxy forces is therefore a potential course of action, either in the form of attacks against US interests or indirectly against its regional allies, the most obvious target being Israel. An attack one step removed from the Iranian State apparatus allows a degree of ambiguity and an opportunity to publicly distance itself from the deliberate action. However even this is now problematic.

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The airstrike on Soleimani also symbolically killed Abu Mahdi al-Muhandis, the leader of Kata'ib Hezbollah and deputy leader of the Popular Mobilisation Force, a proxy Iranian organisation; formally part of the Iraqi military but operating largely independently. The message this sends is that the targeting of the senior leadership of these groups is very much on the table. While these proxies are often targeted by the US, generally this has happened at the operational and tactical level.

A more logical strategy therefore would be to adopt a longer-term asymmetric response, potentially including a high-profile cyber-attack or number of attacks on US economic interests or infrastructure. The advantages of this, aimed at the right target, is that it would be visible, potentially appease the internal population, but without inviting a direct military counter-response. The downside is that a cyber-attack may be unsuccessful and fail to satisfy the more fanatical regime supporters. That Iran will overtly and publicly re-invigorate its nuclear programme is a given and they have already messaged this intent, but it is a longer-term strategy and in itself is unlikely to placate the more hard-line support of the Regime. ***Several commentators have posited that Iran may close the Straits of Hormuz to international shipping in order to prevent the movement of oil to the West. But this has always been thought of as an action of last resort, and an own goal, as Iran relies on the export of oil as its main remaining source of revenue. Iran is only likely to close the shipping route if it sees its existence under imminent threat.***

**THE IRAQI DYNAMIC:** The reaction by the Iraqi administration to push for the expulsion of US forces is an unfortunate and possibly unexpected consequence of the US strike. The non-binding bill in the Iraqi parliament seeking to withdraw support for the continuing presence of coalition forces in Iraq, if passed, would see a significant reduction in US and allied influence in the region and has potential longer term impacts on the re-establishment of ISIL. This wouldn't be the first-time western coalition forces have been asked to leave (in October 2011 the then Iraqi PM, al-Maliki was unable to agree a mutually agreeable Status of Forces Agreement with the US and all forces departed the country by the end of the year), however the situation is significantly different now, with Iranian influence in Iraq arguably significantly greater. How much of the push for US expulsion is simply rhetoric instigated by pro-Iranian Shia Members of Parliament remains to be seen but the situation is further complicated by the planned departure of the Iraqi Prime Minister Adel Abdul Mahdi. While overtly supportive of a

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withdrawal, he is privately probably aware of the damaging consequences and will be trying to mitigate a rapid and complete departure. Israel, which has been notably relatively quiet on the situation, will be quietly preparing its own defensive and potentially retaliatory action in the event of any proxy attack.

### **CONCLUSION**

***Without understating the significance of the current situation, and the potential for strategic miscalculation, there is a long way to go before the region is plunged into all out conflict and there is so much at stake that all sides will wish to prevent this from happening. For the US and its allies, a continuing presence and influence in this volatile region remains critical in preventing the expansion of the Iranian sphere of influence and a resurgence of Sunni extremism in the form of ISIL and its affiliates, (ironically the one thing the US and Iran has as a common aim), and for Iran, the continuing existence of the Islamic Republic in its current form is at great risk if it fails to calibrate its response. There remains much to play for.***