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What is the probability of an Israeli strike against Iran in the six months following the 2012 US presidential election?



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Open Briefing currently assesses an Israeli strike against Iran to be **highly unlikely** between the US presidential elections in November 2012 and the Israeli elections in January 2013, and **unlikely** between January and the Iranian presidential elections in June 2013. This outlook is predicated on five key areas of consideration, summarised below and expanded upon in the following pages.

- 1. Persisting regional uncertainty will oblige Israel to calculate its moves with painstaking caution.** A military strike on Iran, with the possible blowback this could produce, is likely to occur only *in extremis*, that is, if Israel believed its existence could be jeopardised by containment, or in the face of incontrovertible “smoking gun” evidence. However, growing signs of Iranian cooperation with al-Qaeda and international jihadist groups, as well as the Israeli leadership’s fluctuating views regarding Iranian Shiite rationality, represent wildcards.
- 2. Israel’s military ability to eradicate or significantly disrupt Iran’s nuclear programme is far from clear.** Israeli military authorities assess that a strike would, even in the best case scenario, merely delay Iran’s nuclear progress by up to two years, thereby calling into question the longer-term wisdom of such a move. In addition, Iran has been ramping up its covert operations and asymmetric assets, demonstrating an ability to respond in kind if provoked.
- 3. The impact of parallel measures, especially cyber warfare and far-reaching sanctions, may persuade Israel to postpone a strike.** One indicator of their success has been Iran’s demand for upfront sanctions relief during the P5+1 talks. A further indicator would be cuts in Iranian funding of Bashar al-Assad’s regime in Syria.
- 4. Upcoming elections in Washington, Jerusalem and Tehran will set the stage for what transpires in 2013.** The Obama-Romney US presidential race remains tightly contested. A Barack Obama re-election will most likely favour the ongoing mix of diplomacy and sanctions, but a Mitt Romney victory will not necessarily entail war during the first half of 2013. That said, mounting threats from Israel and the United States – notably if Benjamin Netanyahu and Romney are at the helm – will tip the balance in Tehran further in favour of regime hardliners and the powerful Revolutionary Guards. This could increase the longer-term likelihood of escalation, miscalculation and, ultimately, armed conflict.

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5. **Israel's "special relationship" with the United States and its confidence in Obama's pledge to prevent a nuclear Iran is a central national security pillar.** Although this confidence is currently unclear, the longer-term ramifications on bilateral relations render a unilateral strike in the assessed six month period unlikely. Conversely, if it continues to cry "wolf" and overplays its hand, Israel may yet corner itself into a strike in order to maintain its deterrence credibility.

1. Israel's regional threat calculus

Israel faces the prospect of a highly hostile Iranian regime on the verge of becoming nuclear. That Tehran has repeatedly called for the removal of that "cancerous tumour [Israel]" and is believed to be the principal state sponsor of terrorist attacks against Israelis throughout the world renders it an unacceptable threat for most within the Israeli government.

Whether Iran would initiate a nuclear attack depends on the rationality of its leadership. While the Islamic Republic has repeatedly invoked resistance rhetoric as a front for its regional leadership aspirations, certain critical decisions over the past three decades were clearly governed by realpolitik and the pursuit of regime survival. Moreover, Israel is thought to possess some 200-300 nuclear warheads and a second strike capability, which a rational Iran would not ignore.

On the other hand, Iranian nuclear parity could degrade Israel's regional strategic manoeuvrability, embolden Tehran and spark a regional arms race.

As things stand, the Iran-led "resistance axis" (Lebanese Hezbollah, Assad's Syria, assorted Iraqi Shia groups and Palestinian rejectionist factions including Palestinian Islamic Jihad and, until recently, Hamas) is situated in adverse circumstances. Iran is foundering under sanctions, yet it has already injected some US\$12 billion in lethal and non-lethal support to keep Assad's regime afloat. Hezbollah's arsenal, specifically its Iranian-manufactured rocket and missile stockpiles, depends heavily on overland transfers via Syria. The recent assassination in Beirut of a leading Lebanese security figure is putting heat on Syria – and conceivably Hezbollah – for its perceived involvement. And Hamas has taken pains to dissociate itself from all three.

Elsewhere, however, the region's emerging strategic balance cannot yet be fully discerned. An exception to this is the ascendancy of Sunni Islamists, Salafists and the Muslim Brotherhood in domestic politics, prominently in Libya, Tunisia and Egypt. In parallel, jihadist militant groups frequently linked to al-Qaeda are believed not only to be gaining ground in Muslim Africa, Yemen, and Iraq but closing in on Israel's borders via the Syrian Golan and the increasingly lawless Sinai Peninsula.

Egypt and Turkey, two of Israel's key erstwhile regional allies, have become ambivalent, the one following the presidential election of a former Muslim Brother, and the other owing to Ankara's series of spats with Israel over the 2008-09 Gaza War (Operation Cast Lead) and the May 2010 boarding by Israeli commandos of the Gaza-bound MV Mavi Marmara.

Even Jordan's mid-term stability has been cast in doubt as it attempts to introduce across-the-board reforms while resisting pressures to devolve into a constitutional monarchy. Since last year, three prime ministers have been fired. Furthermore, the Islamic Action Front, the political arm of the Muslim Brotherhood with significant support bases among the Palestinian majority, is now the largest opposition group.

Israel's present borders are therefore more sensitive than usual. Despite indications of Sunni-Shia antagonisms worsening, evidence including the "Bin Laden files" (files removed by US Navy SEALs from the Abbottabad compound) now suggests a growing strategic alliance, however awkward, between Shiite Iran and Sunni jihadists beginning with al-Qaeda.

Since it is impossible to confidently ascertain the Iranian leadership's true intentions, Israel must and will continue taking its threats at face value. But regional uncertainty will warrant painstaking caution.

2. The balance of forces

The Israel Air Force is capable of a well-orchestrated strike on Iran's nuclear facilities, even without US support (assuming unproblematic flight routes). It possesses some 500 aircraft, including F-16 variants, F-16Is (Sufa) and F-15Is (Ra'am) – the primary platforms to be deployed in interceptor (top cover) and ground-attack missions – as well as early warning/command and control aircraft. Their inventory of refuelling craft is, however, uncertain and either the use of airbases near Iran (such as in Azerbaijan) or highly innovative buddy refueling techniques may be necessary.

Among the explosive ordnance adapted for such a mission, Israel also possesses approximately 100 US-made laser-guided GBU-28 "bunker-busters" capable of penetrating seven metres of concrete or over 30 metres of earth, although this is still inadequate for deeper sites like Fordo that require the GBU-57 Massive Ordnance Penetrator. An alternative might be envisaged in some kind of electromagnetic pulse attack.

More importantly, the Israeli Defense Forces boasts some 150 Jericho-class ballistic missiles designed to carry nuclear payloads. This includes the multiple warhead Jericho-III ICBM, with an estimated range (5,000-12,000 kilometres) that encompasses much of Eurasia. Alternatively, the shorter-range Jericho-IIs could also be fitted with bunker-buster munitions. Offshore, the Israeli navy maintains a second strike capability via cruise missiles carried by its handful of Dolphin-class/Type-212 submarines.

Iran's air force does not match up to Israel's. Its flight complement currently comprises some 300 plus semi-reliable pre-1979 US attack craft (F-14s, F-4D/Es Phantoms and F-5s) and both Russian (MIG-29, SU-24 and SU-25) and Chinese models (F-7M/MIG-21). Its air defence systems comprise a mixture of surface-to-air systems, the more notable of which are the SA-15 Gauntlet (Tor-M1) and the Pantsir-S1E. It has not yet been able to acquire the potent S-300 anti-ballistic missile system from Russia though and remains keenly aware of the need to either purchase or develop a similar platform, likely with Chinese support.

However, the Iranian Revolutionary Guard Corps (IRGC) commands potent offensive capabilities. These include one or two missile brigades, each consisting of 12-18 Shahab-1 and/or Shahab-2 missile launchers, and up to 12 additional launchers for the Shahab-3 medium-range ballistic missile (MRBM) with a maximum reported range of 1,930 kilometres. The latter are able to deliver multiple nuclear warheads and hence are of primary concern to Israel. Shahab-3s loaded with biological and chemical agents would also complicate an Israeli intercept, particularly in the terminal phase of descent, because of the obvious risks presented by downing such missiles over Israeli territory. Iran also maintains an arsenal of Ghadr-110 MRBMs with a range of 1,800-2,000 kilometres and an even faster set-up time than the Shahab-3.

In addition, Iranian Unmanned Aerial Vehicle (UAV/UCAV) capabilities continue to be developed, at least three of which (the Shahed-129, Karrar and Ababil-T) are believed to be ordnance-capable. The Ababil-T is Iran's most sophisticated UAV/UCAV; incorporating some stealth characteristics, it is the only one of its kind in Iran's arsenal that can reach Israeli airspace.

Finally, the IRGC maintains a formidable asymmetric asset in its special Qods Force, which has mounted covert operations targeting Israeli and Jewish interests worldwide.

This has not yet taken into account the missiles and rockets positioned in Lebanon, Syria, perhaps Gaza and potentially elsewhere in the region. An Israeli attack will therefore come at a high cost even if it does not trigger a regional conflagration. In response, Israel in collaboration with the United States has been developing a highly accurate multilayered aerial defence system comprising the Iron Dome (against tactical short-range rockets) and Arrow-2/3 and Patriot batteries (anti-ballistic missile systems), with David's Sling (against medium- and long-range rockets) expected to come online sometime in 2013. The United States has supplemented these systems with mobile X-band radars capable of greater range and therefore longer detection time.

On balance, given that Iran's facilities are widely dispersed and some are heavily fortified, Israel's military ability to eradicate or significantly disrupt Iran's nuclear programme is far from clear. In addition, though Israel has considerable military might, Iran also has substantial conventional and asymmetric assets, which provide it with a significant capacity to respond in kind if attacked.

3. The impact of parallel measures

Iran continues to be saddled with increasingly far-reaching sanctions. On 2 October 2012, another bout of unrest erupted in Tehran involving the politically influential merchant class. These *bazaaris* were protesting against economic unpredictability brought on by oil sanctions and inflationary domestic policies.

Iran has been virtually excluded from international transaction networks and therefore from the means to export its oil – which has dropped nearly 60% to some one million barrels per day – and to acquire foreign currency, 80% of which it derives from oil export receipts.

But the government has not been faultless either. When Mahmoud Ahmadinejad decided to implement massive subsidy reforms in 2010, cash handouts intended to offset these led to a money glut. In April 2011, the government decided to lower interest rates to levels inferior to inflation, thereby forcing savings from banks into other speculative safe havens such as gold, real estate, stocks and foreign currencies.

Inflationary pressures have also been exacerbated by the mass psychological effect of impending conflict and spiralling confidence in the Central Bank's ability to handle the economic crisis. The Iranian rial (IRR) is currently trading in the black market at just under 40,000 IRR to the dollar after depreciating by two thirds since 2011. The government, however, continues to officially peg it at 12,260 IRR.

Owing to sanctions and persisting structural deficiencies, Iran's economy is particularly reliant on imports. However, the private sector continues to bear the brunt of the economic crisis. State enterprises, the *bonyads* (religious foundations) and the bulk of the legal and contraband business empire controlled by the IRGC, estimated at about a third of the economy, are largely shielded by their access to the preferential exchange rate, particularly for essential imports, not to mention duty-free customs. Still, Iran's foreign reserves may be shrinking faster than thought, an impression reinforced by the Central Bank's September announcement to further limit US dollars to basic categories of essential imports.

The Ahmadinejad government has responded to the *bazaar* unrest by cracking down on black market currency speculators but also, remarkably, blaming the sanctions for the first time. The extent of the protests have not yet approximated those of June 2009, but if full-blown hyperinflation develops, unpredictable consequences both inside and outside the country cannot be ruled out.

In addition to efforts to economically and diplomatically isolate Tehran, Israel is believed to be behind a series of covert measures targeting Iran's nuclear programme, including computer viruses, sabotage and assassinations of Iranian scientists.

The Stuxnet malware was gauged to have pushed back Iran's enrichment programme by some 18 months by physically damaging the P-1 centrifuges at Natanz. This has since been followed by the spread of highly sophisticated spywares targeting critical sectors including oil, finance and shipping. The full impact of this cyber-warfare still remains unclear however.

Israel will continue weighing the benefit of parallel measures against the cost of a unilateral strike. Further visible knock-on effects, such as funding cuts to Assad's regime, are likely to provide greater justification for preferring this front over military action.

4. Upcoming elections

The fallout from a unilateral Israeli strike before the 6 November 2012 US elections would likely oblige United States to join the fray in an effort to pre-empt attacks against regional assets, if not to support Israel's offensive. But Israel would still need to coordinate efforts with Washington to be effective in the longer term. The adverse impact a unilateral strike could have on the US-Israel strategic alliance therefore renders this unlikely, especially in light of Benjamin Netanyahu's new spring/summer deadline.

A re-elected President Obama would likely respond to an Israeli strike in one of three ways:

1. Approve a limited aerial and naval campaign against Iran, leveraging his post-electoral wiggle room.
2. Watch, wait and react only when Iran directly threatens US interests (a stance that is clearly emerging as Washington's preferred foreign policy strategy in the region).
3. Re-engage with Iran.

There is little appetite for another full-scale ground war, much less in the absence of an unequivocal *casus belli* and against a regional power stronger and more complex than Saddam Hussein or the Taliban. Having itself unwittingly strengthened Iran by invading Afghanistan and Iraq, Washington would think twice about further upsetting the regional balance of power with a strike the aftermath of which no one can predict.

A Romney victory at the outset appears to favour a strike. The Republican presidential candidate has been voluble about his military commitment to Israel but conspicuously vague on details. Furthermore, the time a newly elected president requires to settle into office will make war plans somewhat undesirable at least for the first few months. And judging by the promise-policy gap, there is little reason that Romney would not respond in one of the three ways mentioned above. An unconfirmed if credible report that Tehran has agreed to one-on-one talks with Washington – provided Obama is re-elected – might severely complicate Romney’s combative posturing even if many remain sceptical of Iran’s true intentions.

In Israel, Netanyahu has announced early elections for 22 January 2013, ostensibly to bypass coalition disagreements regarding the budget. Deficit spikes would prefigure serious economic difficulties and exacerbate already widespread social justice protests. Early elections are also clearly aimed at stymying challengers from the centre-left, which, though sharply divided, has recently attained momentum with the rumoured joint return of Ehud Olmert and Tzipi Livni. The latest polls predict more than half the Knesset’s 120 seats may go to the secular-orthodox right bloc led by Likud. As voters still largely defer to security matters, Netanyahu will be sure to milk the Iranian issue, although this is no guarantee he will actually strike. The timing of the elections before the spring/summer “red line” is as such expected to strengthen his hand and therefore his chances for re-election.

In Iran, with reformists still burned from June 2009 and uncertain of electoral participation, the 14 June 2013 presidential elections will likely be contested among hardline candidates and specifically the younger pro-Ahmadinejad “neo-conservatives” and the more veteran Conservative-Principlists associated with Supreme Leader Ayatollah Ali Khamenei. On security and nuclear matters, Khamenei remains Iran’s indisputable chief arbiter. Still, Khamenei’s national influence depends on his successful balancing of the regime’s various rival interests and sustaining the patronage network that has virtually turned the IRGC into Iran’s single most powerful establishment.

The next president will therefore continue to reflect Khamenei’s state of mind. Principlists including Ali Larijani, Saeed Jalili and Ali Akbar Velayati who will cleave to the Supreme Leader’s agenda unlike a re-elected Ahmadinejad could signal Khamenei’s intention to dig in. Alternatively, the choice of a relative moderate such as Mohammad Bagher-Ghalibaf or Mohsen Rezaei could hint at greater willingness to placate the Iranian public. There are signs that disgraced former president Ali Akbar Hashemi Rafsanjani, who possesses strong credentials in both free-market economic reform and pragmatism vis-à-vis the West, may figure in the coming elections.

The dynamic among all three electoral campaigns is therefore one to watch closely in assessing this period.

5. Israel-US relations

The probability of an Israeli strike being successful depends significantly on US military cooperation and diplomatic support, making Israel’s “special relationship” with Washington clearly central in its calculations. Israel’s security chiefs have repeatedly underscored this point and have cautioned against recklessness.

Obama's fraught personal relations with Netanyahu do not necessarily reflect a gulf between the longstanding allies. The record speaks louder than the rhetoric: the current US president has overseen far tighter military-security cooperation than previous administrations, including unprecedented transfers of bunker busters and improvements to Israel's multi-layered missile defence system, over and above the US\$3 billion foreign aid annually earmarked for Israel. Obama has repeatedly asserted that "all options are on the table," and that prevention and not containment is how he sees the Iranian nuclear endgame. Three US carrier strike groups have been deployed in the Persian Gulf. And by reaching out to Tehran in 2009 shortly after assuming the presidency, Obama arguably wrought more damage to the regime's legitimacy in the eyes of its own public than President Bush ever did.

However, Washington will also be judged against its track record of failing to prevent states such as China, Pakistan and North Korea from achieving nuclear status. For critics, there is no reason why a re-elected Obama would not allow the same in relation to Iran. After all, Mao's China was considered a far greater ideological and military threat to US interests than Iran poses today.

In addition, Israel is dangerously inflating its own credibility deficit by disregarding its previous red lines:

- In 1996, Netanyahu, then in his first term, declared a civilian plant unacceptable.
- In 2004, the red line became uranium conversion.
- In 2006, it was 5% enrichment.
- In 2009, it was enough 5%-enriched uranium for one bomb, followed by the existence of secret nuclear facilities.
- In 2010, it was enrichment beyond 5%.
- And now, it is the moment before Iran weaponises its stockpile of enriched uranium.

The scope and volume of public discussion in recent months also represent a departure from the careful secrecy that prefaced the surgical strikes in Osirak (Iraq) and Deir az-Zor (Syria). Furthermore, this begs the question why Israel's leaders, first, abandoned the element of surprise by not striking Iran two decades ago when their intelligence indicated a then-nascent nuclear programme, and, second, only heavily invested in the sort of attack and support aircraft required in such operations over the past decade or so.

However, if Israel overplays its deterrence card, it may find it very difficult to step back from the brink at some stage, with or without US support.

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