

Iran likely to step up harassment of shipping and ‘deniable’ sabotage attacks, as part of its controlled escalation strategy

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On 22 July, UK Foreign Secretary Jeremy Hunt said that the UK intended to join an as-yet-to-be-established European maritime security force to protect shipping in the Gulf from harassment by Iran.

- **The recent intensification in tempo of Iranian operations, and other indicators, point to Iran seeking to force a conclusion to its confrontation with the US on its terms, and not, as previously assessed, playing a long game, pending US elections.** The increased tempo of Iranian-sponsored provocation; the pressure on the Iranian economy from US sanctions; US President Trump’s declared reluctance to take military action; and Iranian Foreign Minister Javad Zarif’s comment on 18 July that there was an over-50% chance that Trump would be re-elected, all point to Iran seeking to force its confrontation with the US to a resolution on Iranian terms, in the process risking war. Even if it once was, Iran no longer appears to be playing a long game, pending the outcome of the US elections. Pro-Iranian Yemeni and Lebanese media have in recent weeks repeatedly stated that Iran has ended its ‘strategic patience’ policy, and is now moving towards a ‘rolling response’ against the US, to force the removal of sanctions. Iranian escalation will likely take the form of further harassment and seizure of commercial shipping, ostensibly on ‘policing’ grounds, and deniable sabotage attacks on oil shipments, putting pressure on the US’s Gulf Arab allies to reduce their support for US policies. It will also likely involve attacks on US diplomatic and military personnel and assets in Iraq through local proxies, rather than by the identifiable involvement of Iran’s Islamic Revolution Guards Corps (IRGC). Iran is also likely to continue to free its nuclear programme from Joint Comprehensive Plan of Action (JCPOA) limits, gradually increasing its violations of the agreement, and its pressure on the Europeans.
- **The UK decision to opt for a European task force, rather than accept the US proposal of joining a US-led force, will delay the provision of effective protection for vulnerable UK and other shipping.** The UK decision to join a European force, rather than an already deployed US force, for protection of international shipping reflects the reluctance of Europe and the UK to be associated with the US policy of exerting ‘maximum pressure’ on Iran and their commitment to the JCPOA on Iran’s nuclear programme. The decision is likely to delay the provision of effective protection, pending the generation and deployment of the European task force, which is likely to take weeks, leaving shipping dependent on ad hoc co-operation between the US and the small UK naval presence (shortly to increase from one to two warships).
- **Iran is likely counting on US reluctance to risk an all-out war and calculating the Islamic Republic would survive, even in the worst case scenario of a sustained US air campaign.** Iran will continue to raise the stakes and pressure the US to opt for negotiations on Iran’s terms, rather than the alternative of war. Iran is likely calculating that, even if its actions result in conflict, the US has no appetite to sustain an all-out war, particularly one involving the commitment of ground forces. The Iranian government likely assesses that, even in the worst case of Iran being subject to a sustained US air campaign, the Islamic Republic would survive, regardless of the extent of material damage. Iran’s survival would likely be used by Iran to show Gulf Arab states that they cannot depend on the overwhelming military strength of the US for their protection, and should instead rely on good relations with Iran.



UK-flagged tanker *Stena Impero* is seized as it passes through the Strait of Hormuz by Iran’s Islamic Revolution Guards Corps Navy on 19 July 2019. The tanker was detained in Bandar Abbas.
Getty Images

Indicators of a changing risk environment:

Increasing risk

- Western naval forces sink Iranian small craft attempting a ship seizure.
- The US launches airstrikes against IRGC bases on islands in the Gulf, such as Lark, Qeshm, or Abu Musa in retaliation for Iranian obstruction of freedom of navigation.
- Iran stockpiles more than 100 kg of 20% enriched uranium.

Decreasing risk

- The US reinstates some oil export sanctions waivers.
- Europe resumes oil purchases from Iran, or permits the use of euros to settle Iranian oil sales.

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