

Iran Primer – July 2019





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Military Threatto Who?















Regional

Shi'a

Perspectives are Important



Shi'a Populations

Iran: 90-95%

Iraq: 65%

Bahrain: 65%

Lebanon*: 35%

Yemen: 35-40%

KSA: 20%

Syria*: 10-15%

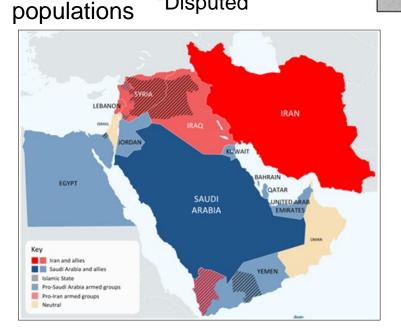
*Disputed



Iran's Regional View



KSA's Regional View



An Iranian view of surrounding U.S. military bases showing who is the "true" threat





Traditional Current U.S. Expert "Views" on Iran

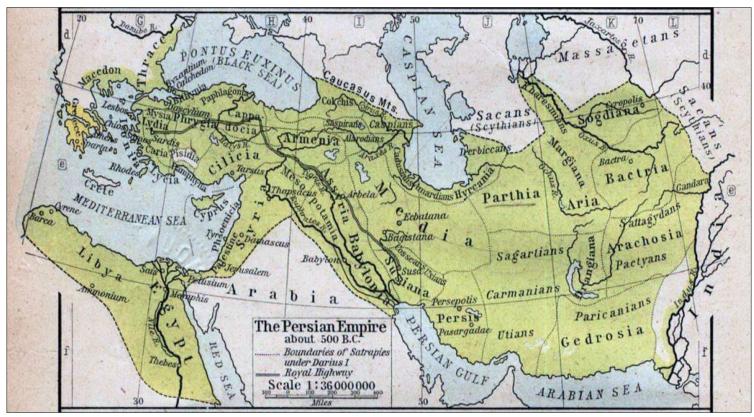


- Iran is a Revolutionary state, has been such since 1979 and will likely remain so probably for decades into the 21st century (the 2009 Green Movement was crushed)
- Iran is a theocracy, believes that what they are doing is 'Allah's will'
 - Is why the U.S. is called the 'Great Satan' by the mullahs
 - This theocratic underpinning imbues the regime with immense strength
- Taken together, Iran wants no part of the current 'secular' world order, remains
 revolutionary and intent on changing that order to one of an Islamic Imamate in which
 leadership of all Muslims will be by Velayat al-Fagih with a Shi'a in the lead
- Iran is in a desperate war with the U.S. (aka the Great Satan) as the major roadblock to Iranian aspirations
 - Exporting of the Revolution abroad is to primarily Shi'a populations with some allied Sunni enclaves/groups heavily dependent on Iranian funding
 - Any U.S. strikes on the Iranian homeland (Persia) is not the opening for a broader war but just an intensification of the current one
 - Iran is not shy to bring the war to America nor to act against global U.S. interest
- Iran traditionally sees itself as an immensely powerful nation, which it is not
 - Iranian/Persian history is replete with examples of false assumptions, overreach and disasters ensuing from such miscalculations
 - Iranian leadership ability at self-deception is powerful



An Imperial Past Looking back to Greatness





Achaemenid Empire circa 500 BC, Iran has an imperial past of which it is very aware, often leading to current overreach









Iran's Strategic Culture The Iranian 'Way of War'



- Preference is to avoid major conflict (1980-88 Iran-Iraq War very costly)
- Assume a military posture of deterrence and defense, preferring a slow OPTEMPO, measured escalation and reciprocal actions to avoid escalation (historic Persian inclination to 'incrementalism')
 - Careful assessment of opponents 'red lines', will step back after achieving a deterrent effect
 - Threats are often more for domestic vice international messaging
- Shape the region via proxies and Information Operation/Cyber
 - Iranian victory over U.S. in Lebanon (1983 Hezbollah)
 - Iranian victory over Israel in Lebanon (2000 Hezbollah)
 - Iranian victory over U.S. in Iraq (2011 PMUs)
 - Iranian victory over Islamic State in Iraq (2017 PMUs)
 - Iranian victory over Islamic State in Syria (2019 PMUs)
- U.S. cyber attacks (STUXNET) has led to Iranian cyber-attacks on U.S. financial networks, ARAMCO and physical attacks on U.S. drones
- Lack of visible (kinetic) U.S. response to Iranian escalation emboldens Iran (U.S. does not have the will to shed blood)
- Significant announced Iranian 'red line' If Iran can't export oil via the Strait of Hormuz, no one will



Important Amplifying Points



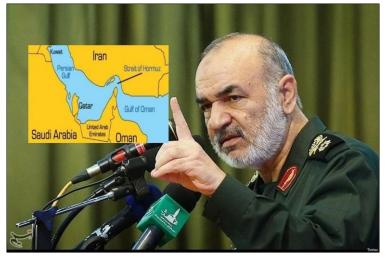
- Iran is fairly skilled at deception and misdirection, tactically and strategically
- Despite its internal (and growing) weaknesses, Iran is pursuing a multi-pronged effort to obtain regional hegemony, primarily aimed at Sunni Saudi Arabia and its allies and proxies
- The first part, the Iranian nuclear program, while aiming for an eventual nuclear device weaponized for developing delivery systems, is a distraction
 - o Iran's nuclear program is over 40 years old, with no weapon yet
- A second thrust is the development of regional and global proxies who can carry out Iranian interests, support Iranian terrorist threats and spread instability and chaos among Iran's enemies
- Finally, Iran is aiming to control what they call "Arab capitals", claiming to already have four which 'belong to the Iranian Revolution'
 - Damascus, Sana'a, Beirut, Baghdad
 - Iran has now boasted it has reached the state of 'Grand Jihad' and can impose its will upon the entire Middle East now





New IRGC Commander Appointed by Khamenei



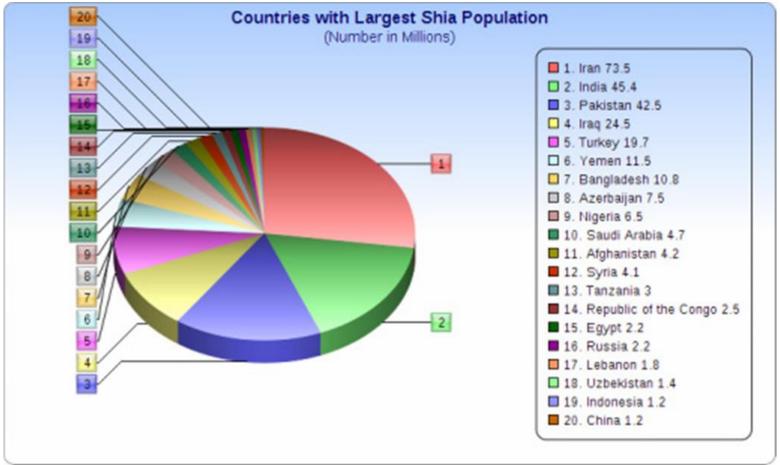


- Major General Hossein Salami, new leader of the IRGC as of April 2019, has been tasked to prepare a military campaign against the U.S. to break the sanctions
- Salami was singled out for U.S. sanction personally in 2007, of which he is very proud
- His organization, the IRGC, was labeled a 'terrorist organization', of which he is very proud
- He is also a board member of the Khatam-al Anbiya Construction Headquarters (referred to as GHORB, the name meaning 'Seal of the Prophets'), Iran's major engineering arm and one of Iran's largest contractors in industrial and development projects (a bonyad, GHORB was created during the Iran–Iraq War to help rebuild the country, and has diversified over the years into companies dealing with mechanical engineering, energy, mining and defense)



Recruitment Pool Shi'a Populations Globally





*** Included in 'generic' Shi'a populations are Nizari Ismaili, Zaydi, Druze, Bektashi, Alawites, Alevi, etc., so an accurate count of 'Shi'a' populations who might be exploited by Iranian interests is smaller than often assumed



Qasem Soleimani Al Qods Force Commander





Qasem Soleimani



Qasem Soleimani & mother

- IRGC Major General and commander of the Quds Force since 1998 (Quds Force is responsible for extraterritorial military and clandestine operations)
- Fought in the Iran-Iraq War, rose to command 41st Division
- As Qod Force commander, supported anti-Saddam Shia and Kurdish groups, aided Hezbollah and Hamas against Israel
- Has coordinated Iranian support to Iraqi and Syrian Shia PMUs against Islamic State
- Is coordinating Shia opposition (and allied Sunni) to U.S. and Coalition allies, is providing planners and material support in anticipation of U.S./Iran conflict



Some Examples of Iranian Proxies





Members of Quwat al Ridha, who belong to small Twelver Shia community in Syria (mainly from the Homs region); controlled by Hezbollah



Qasem Soleimani, commander of the IRGC Quds Force, with members of the Badr PMU



Liwa Fatemiyoun and Liwa Zainebiyoun from Afghanistan & Pakistan



Iraqi PMU Kataib Hezbollah



Al Quds and Lebanese Hezbollah in Syria



However... The Current Reality



- The Iranian government, ostensibly religious in orientation, has been focused on survival and self-enrichment since just after the death of Khomeini in 1989
 - Pragmatic, military-dominated (IRGC and the Basij, not the Artesh)
 - Think of a mafia-like organization running a country, with its fingers and enforcers able to reach into every segment of society
 - When Khamenei dies, the IRGC will have the upper hand, not religious or apparent revolutionary leaders
 - Even should the 'theocracy' (mullah-rule) collapse, the IRGC will survive as an organized military/economic enterprise, thus it is not a revolutionary state entity
- The example of crushing the Green Movement is dated, what is more important now is that the primary recruiting pool for the IRGC/Basij and Islamic Republic governing elements is greatly discontented with the current leadership
 - Revolutionaries don't exist anymore, they have either died, been imprisoned or fled abroad
 - Those now in power are hardline opportunists and clerics who received their credentials under the post-revolution leadership
- The main reason Iran retains the 'Great Satan' propaganda is that it allows it to appear linked to the foundation upon which the Islamic Republic was built
 - Is no longer about what Allah wills but about politics, corruption and a narrative to use as a rallying point to keep the Iranian people quiescent and to impress foreigners with the dangerous relentlessness of the regime

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Israel and the Syrian Conflict Potentially Nuclear





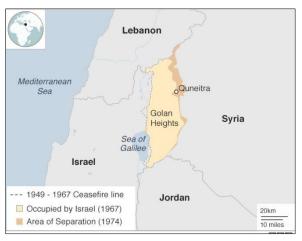




Israelis on guard on the Golan

Harakat Hezbollah al Nujaba (Golan Liberation Brigade) flag at front, and "Israel will burn" banner in the back, founded by IRGC in 2013

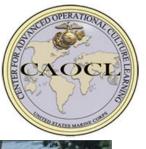
25 March 2019 the U.S. recognized Israeli sovereignty over the Golan Heights, against UN Resolutions 242 (1967), 328 (1973) and 497 (1981), supporting 1907 Hague Protocols



- Since Aug 2005 Iran had been engaged in a proxy conflict with Israel
- Primarily executed via Hamas and Hezbollah
- Fortifications east of the Golan
- May 2018 first open clash between Iranian and Israeli military forces (Iranian rocket strikes on Israeli forces on Golan; Israeli retaliatory airstrikes on ~50 targets in Syria, estimated 7 IRGC dead)



Expectations and Discontent





Iran's citizens do not live in a backward country but desire much more than a 'Mullahocracy'



Iran's younger citizens, called 'Generation Normal' ardently desire access to the rest of the world; increasingly not only urban but rural as well



Conspicuous consumption - A Corvette, Porsche, and Mercedes Benz at a stoplight in north Tehran (2018)

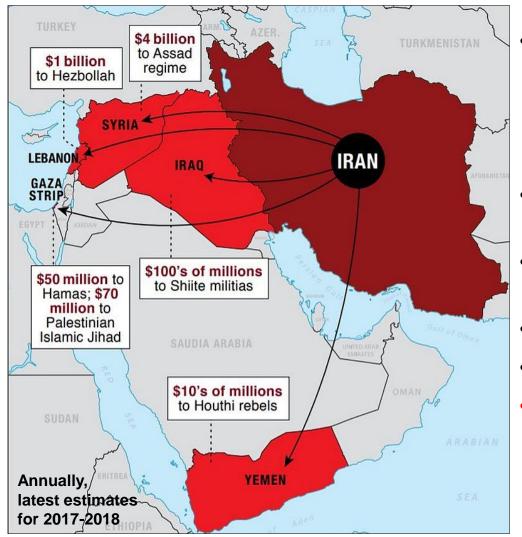


Demonstrating for freedom and a removal of Iran's Mullah-led government (and the IRGC economic/security complex) by Iranian expatriate community



Iranian Proxies Abroad - Funding Shortfalls-





- U.S. sanctions, re-imposed, have caused significant loss to the Iranian economy, forcing a suspension of payments to proxies abroad
- Iranian economy has contracted nearly 5%, since 2018
- Oil exports have fallen from 2.7 million b/d to almost 400,000 b/d
- Inflation is averaging 31%
- Currency has lost 2/3 of its value
- In Feb 2019, France, Germany and UK created a financial SPV called INSTEX to by-pass U.S. sanctions and allow Iran to conduct non-dollar trade



Iran is Running Out of Water



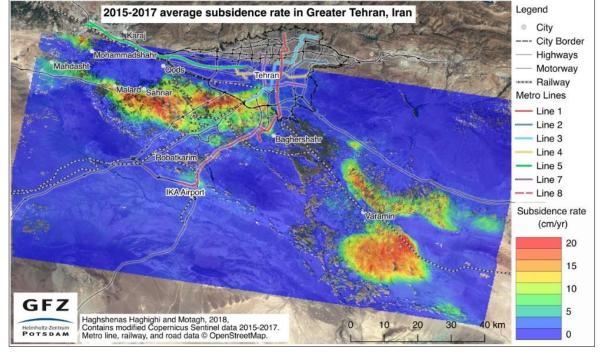


A massive sinkhole (235 ft deep) near the village of Kerdabad in the Iranian province of Hamadan, August 2018.

Due to over-exploitation of aquifers and a resulting collapse of underground structures, the landscape around Iran's capital has begun to sink dramatically



Sink hole in Tehran, 2018





Questions?



