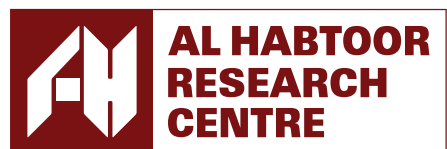


Recurring Patterns:

How Will Iran Respond to Ismail Haniyeh's Assassination?



Strategic Estimates

August 2024



The world has been on edge since July 31, 2024, awaiting Iran's response to the assassination of Ismail Haniyeh, head of the Hamas political bureau, in Tehran by an Israeli attack. Haniyeh was targeted while attending the inauguration ceremony of Iranian President Masoud Pezeshkian, marking a direct challenge to Iranian sovereignty and its role as a regional leader of resistance movements. This event underscores the broader confrontation between Iran, which opposes what it perceives as the United States and Israeli dominance in the region. Given the assassination's symbolic and strategic significance, many see Iran's retaliation as inevitable, particularly amid escalations between Israel and Iran. Notably, this incident is part of a broader series of high-profile killings targeting figures within the so-called resistance axis. Just hours before the explosion in Tehran, Israel launched a missile strike in Beirut's southern suburbs, killing Fouad Shukur, a senior Hezbollah military official, while also claiming—without confirmation—the assassination of Mohammed Deif, a leading Hamas military commander.

While consensus exists regarding the certainty of an Iranian response, there is sharp debate within political and military circles over the nature of this retaliation. The targeted nature of the Israeli strikes suggests that a direct and immediate Iranian response may be needed to restore its deterrent credibility. However, Iran's extensive network of regional proxies presents an alternative, allowing Tehran to retaliate indirectly while avoiding the military and economic costs of direct confrontation. This calculation has become more critical following the U.S.'s declaration that it would militarily defend Israel against any Iranian attack, reaffirming its earlier stance on Iranian missile strikes against Israel in April.

Predicting the nature of Iran's response can be facilitated by examining the pattern of its previous reactions to similar attacks, particularly given Iran's long history of confrontations following the 1979 revolution and its enduring hostility toward the U.S. Among these conflicts, the one most analogous to the current situation is the so-called Tanker War, which took place between Iran and Iraq from 1984 to 1988. Iran successfully drew the U.S. into a large-scale military engagement in the Arabian Gulf during this period. This scenario holds significant parallels to today's tensions, as will be detailed later.

This paper, therefore, aims to analyse the similarities and differences between Iran's current posture and its stance during the Tanker War from multiple perspectives—military, political, and economic—both internally externally. By comparing the dynamics at play, including the role of the U.S. in both scenarios, this analysis seeks to clarify what can be expected from Iran in light of these combined variables.



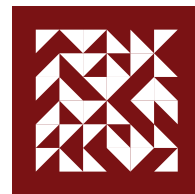
The Tanker War

In early 1984, during the Iran-Iraq War, Iraq escalated its strategy by targeting Iranian oil infrastructure, launching attacks on oil tankers and the unloading station at Kharg Island, Iran's primary oil export facility. The aim was to provoke Iran into closing the Strait of Hormuz, potentially triggering foreign intervention. Iraq declared that all vessels bound to or from Iranian ports in the northern Arabian Gulf would be subject to attacks by its Air Force, including fighter jets, helicopters, and missiles. In response, Iran targeted tankers from Gulf states, notably Kuwait and Saudi Arabia, that were transporting Iraqi oil, threatening to block the flow of oil to global markets. This escalation prompted U.S. intervention in the Gulf to secure tanker traffic and safeguard the steady flow of oil, mainly as attacks increasingly targeted vessels from neutral nations, threatening their access to oil revenues.

The U.S. played a critical role in the Tanker War. Initially, the U.S. sought to protect Arab oil tankers by escorting them with warships from Gulf waters to the Red Sea. However, these measures proved insufficient as Iranian attacks intensified, increasing from 53 in 1984 to 91 in 1987. In response, the U.S. escalated its involvement by reflagging Kuwaiti oil tankers with American flags, thereby extending full U.S. military protection to these vessels, including robust naval escorts.

Following the reflagging, the U.S. initiated Operation Earnest Will to ensure freedom of navigation in the Gulf. The operation involved deploying U.S. naval forces to escort the reflagged tankers and shield them from Iranian aggression. This led to multiple confrontations between the U.S. Navy and Iranian forces, significantly raising the stakes. The tension peaked when the frigate USS Samuel B. Roberts struck an Iranian naval mine on April 14, 1988, causing severe damage and injuring 10 crew members, underscoring the perils of operating in mined waters.

In retaliation, the U.S. launched Operation Praying Mantis on April 18, 1988, targeting Iranian naval assets and military-used oil platforms in the Arabian Gulf. The operation destroyed key Iranian warships, including the Frigate Sahand and the Joshan missile boat, as well as the disabling of additional vessels and the destruction of two oil platforms. This decisive action pressured Iran into accepting a ceasefire with Iraq later that year, effectively ending the Iran-Iraq War. Operation Praying Mantis marked the largest U.S. naval surface battle since World War II and was the first exchange of anti-ship missiles between U.S. and Iranian forces.



Similarities Between the Current Situation and the Tanker War

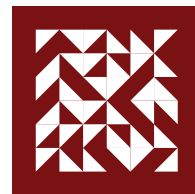
The parallels and distinctions between the current regional dynamics following the assassination of Ismail Haniyeh and those during the Tanker War can be analysed across four key aspects:

1. In both scenarios, Iran finds itself receiving a significant strike that demands a response. In the 1980s, Iraq sought to disrupt Iran's critical oil exports by targeting its infrastructure and threatening to block all ships bound to or from Iranian ports in the northern Gulf. This represented a direct and acute threat to Iranian national security, akin to the current situation following Haniyeh's assassination on Iranian soil, within one of the regime's most secure locations under Revolutionary Guard protection. Both events compelled Iran to consider decisive responses to restore deterrence.
2. Internally, Iran is facing considerable instability due to political, economic, and social pressures, which mirrors the conditions during the Tanker War. At that time, the Islamic Revolution had triggered significant societal shifts, leading to the rise of new power structures while others crumbled. The Supreme Leader's loyalists aggressively imposed his agenda on opposition forces amid an economy already strained by years of war. Today, Iran faces similar internal challenges, albeit under different circumstances, as the regime grapples with widespread unrest and economic hardships.
3. Another similarity lies in the adversary's ability to inflict greater harm on Iran than Iran can reciprocate. Israel, through its proxies, has demonstrated the capacity to target key political, scientific, and military figures both within and outside Iran. Recent Israeli strikes, such as the attack on a military air defence base in Isfahan near key nuclear sites, highlight breaches of Iran's defence lines. During the Tanker War, Iraq similarly held a technological and military advantage, believing it could target Iranian assets with impunity due to Iran's relative inability to inflict comparable damage.
4. The U.S. role remains crucial in both conflicts. The U.S. has pledged to defend Israel if Iran or its proxies launch an attack, much as it did during the Tanker War when it protected Arab oil tankers. The U.S. escalated its involvement by reflagging Kuwaiti tankers under American sovereignty, ultimately leading to direct clashes with Iranian forces. The situation culminated in Operation Praying Mantis, where U.S. naval forces decisively struck Iranian military targets. This aspect of American involvement is a critical point of similarity, as it underscores the potential for broader conflict escalation should Iran retaliate.



While the abovementioned similarities are significant, it's crucial to acknowledge that the two situations also diverge in key aspects. These differences, though numerous, help refine our understanding of the expected Iranian response to the current challenge.

1. A primary difference lies in the array of proxies that Iran now controls, surrounding its adversary and engaging in direct conflicts that have inflicted substantial damage. Even Hamas, with its comparatively limited resources, has been in sustained confrontation with Israel for nine months, resisting the full force of Israel's military without succumbing or yielding a strategic defeat. Similarly, Hezbollah's 2006 conflict with Israel—often referred to as the “Lebanese Mud” in Israeli discourse—remains a painful memory for Israel, which emerged from the conflict without a decisive victory. This reluctance to reengage, despite persistent cross-border attacks, underscores the complexities Israel faces when dealing with Iranian-aligned forces.
2. Although Iran faced internal instability during both periods, today's societal fractures are more pronounced. Contemporary Iranian society is sharply divided, with one segment staunchly supporting the regime's conservative stance while broader groups are pushing for greater freedoms. This tension has sparked recurring unrest, exemplified by the protests following the death of Mahsa Amini in September 2022. By contrast, during the Tanker War, the regime leveraged the revolutionary momentum to unify the populace under a banner of resistance, creating a national consensus that is now largely absent.
3. While both eras are marked by economic hardship, societal perceptions differ starkly. During the Tanker War, Iranians viewed the conflict as a war for national dignity and liberation. In contrast, today's widespread economic dissatisfaction is often attributed to what many perceive as the regime's reckless regional behaviour. Protests driven by economic grievances have persisted since at least 2019, signalling a growing discontent with the regime's priorities and resulting economic conditions.
4. Iran's military capabilities have also evolved considerably. In the aftermath of the Islamic Revolution, purges within the army weakened its effectiveness during the Iran-Iraq War. The regime's measures, including leadership rotations, the creation of parallel forces, and the removal of experienced officers, were aimed at pre-empting coups but left the military fragmented. Despite these challenges, Iran adapted by emphasising guerrilla tactics. Today, however, Iranian forces are at their operational peak, having gained extensive combat experience across multiple theatres in Syria, Yemen, and Lebanon over the past decade. This battlefield experience, coupled with advancements in drone and missile technology, has positioned Iran as a formidable force, even playing a significant role in the ongoing Russian-Ukrainian conflict. This move has drawn sharp criticism from the West.



5. The regional dynamics have shifted dramatically since the Tanker War. Back then, Iran faced a unified regional front, with Iraq receiving military and logistical support from Gulf states that viewed it as a bulwark against the perceived Iranian threat. In contrast, today's regional environment is marked by a cautious neutrality. Gulf states are navigating a delicate reconciliation process with Iran, while some have normalised ties with Israel or are actively negotiating toward that end. This neutrality reflects a desire to avoid entanglement in conflicts that could jeopardise their economic gains.

6. The issue of regional neutrality highlights another key difference. The geographic distance between Iran and Israel, which contrasts sharply with the proximity between Iran and Iraq. In the latter case, Iraq's capabilities were within easy reach of Iranian artillery and aircraft, allowing for swift retaliatory action without escalating the conflict by involving additional adversaries.

In contrast, Israel remains largely out of reach for Iran's air capabilities without navigating the airspace of multiple countries, many of which are distrustful of Iran's intentions and wary of becoming collateral in a retaliatory strike. As a result, any Iranian missiles or drones targeting Israel would first need to traverse the skies of Gulf states or Jordan, all of which are equipped with advanced Western air defence systems. None of these nations are likely to permit Iranian weapons to cross their airspace unchallenged, posing a significant obstacle to Iran's ability to mount an effective response. This difficulty is underscored by the recent missile attack, during which less than 10% of the projectiles reached Israeli territory.

7. The international landscape is also fundamentally different. Iran was largely isolated during the Tanker War, lacking significant global allies. Today, however, Iran is integral to a broader "axis of resistance," a coalition poised to influence the emerging global order. Both Russia and China, as key players within this axis, Russia and China are invested in maintaining Iran's military and economic strength as a strategic counterweight in future conflicts. This strategic importance was underscored by the recent visit of Russia's National Security Council head to Tehran, despite Russia's preoccupation with the ongoing war in Ukraine. This visit signals Tehran's readiness to act while coordinating with its major partners.

While similarities between the current situation and the Tanker War are notable, key differences are equally critical for understanding Iran's potential behaviour. The following comparison highlights these distinctions:



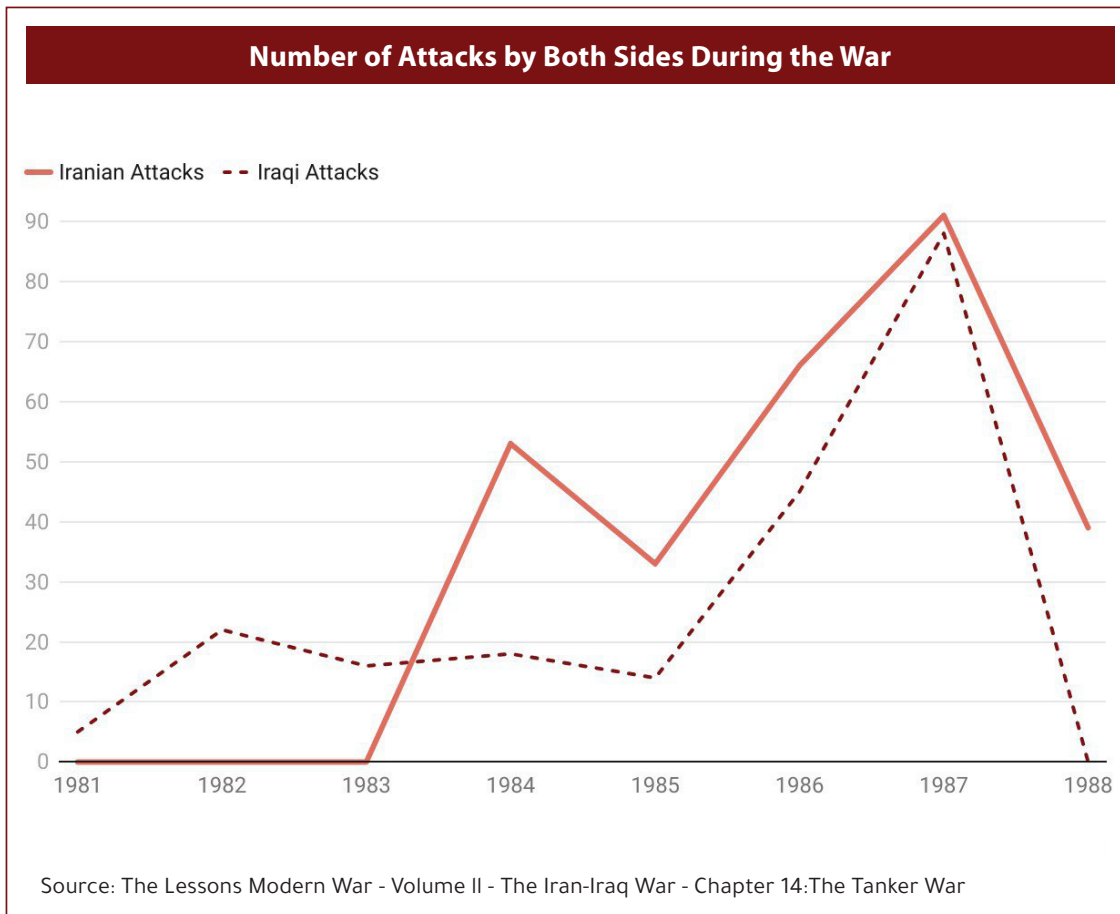
Criteria	The Tanker War	Current Status
<p>The Iranian Situation</p>	<p>Political Scene: During the Tanker War, Iran was led by Ayatollah Khomeini, fresh from the 1979 Islamic Revolution. The resulting political upheaval established a theocratic regime amid severe unrest. Iran was internationally isolated, enduring economic sanctions and facing significant military challenges.</p> <p>Military Capability: The Iranian military was severely weakened by post-revolution purges, leading to a loss of experienced leadership and diminished operational capacity. This forced Iran to rely on unconventional tactics, particularly guerrilla warfare, in its naval operations.</p> <p>International Relations: Iran was largely isolated with minimal foreign support, while its main adversary, Iraq, benefited from substantial backing from the U.S. and other Western countries, further complicating Iran's position.</p>	<p>Political Landscape: Iran remains a theocracy but now has a more complicated political landscape, with various factions influencing both foreign and domestic policy. The regime faces persistent internal opposition and economic challenges due to enduring sanctions and international isolation.</p> <p>Military Capability: Iran's military has significantly advanced since the 1980s, boasting a sophisticated missile program and highly developed asymmetric warfare tactics, mainly through regional proxy groups like Hezbollah. The Iranian Navy has also improved its operational capabilities in the Gulf.</p> <p>International Relations: Iran's regional relationships have grown more complex, with shifting alliances and enmities. Although it remains a contentious player in Middle Eastern geopolitics, it has developed significant partnerships, making it a pivotal actor despite its strained ties with the U.S. and its allies.</p>
<p>The Adversary</p>	<p>Political Landscape: Iraq, under Saddam Hussein, sought regional dominance, triggering the prolonged Iran-Iraq War in pursuit of regional hegemony.</p> <p>International Relations: Iraq was viewed as a critical counterbalance to Iranian influence, enjoying extensive regional support.</p>	<p>Political Landscape: Israel positions itself as a democratic state but frequently engages in conflicts with regional actors, particularly Iranian proxies.</p> <p>International Relations: Israel maintains strong ties with the U.S. and has recently normalised relations with several Arab states. However, its ongoing conflict with Hamas has strained these relations, especially given widespread concerns over human rights violations and the near-genocidal impact on Palestinians.</p>



<p>Military Capabilities of the Opponent</p>	<p>Composition: At the onset of the Iran-Iraq War, Iraq fielded a well-organized military with around 2,700 tanks and 332 fighter jets. By 1987, it had expanded to over 4,500 tanks and 500 aircraft, alongside a vast artillery arsenal exceeding 4,000 pieces.</p> <p>Support and Resources: Iraq received extensive military support from the U.S., France, and the Soviet Union, which supplied advanced weaponry and intelligence. This assistance enabled Iraq to maintain a conventional military approach, including the use of chemical weapons and cutting-edge technology to overpower Iran.</p> <p>Operational Strategy: Iraq employed conventional warfare and chemical weapons in its assaults, maintaining a stable military structure that bolstered command effectiveness and operational coordination.</p>	<p>Composition: Israel commands one of the world’s most advanced militaries, equipped with cutting-edge technology like the Iron Dome, Arrow, and David’s Sling air defence systems, as well as advanced fighter jets such as the F-35. Its well-trained military benefits from nearly 50 years of sustained U.S. military aid and cooperation.</p> <p>Support and Resources: Continued US support has significantly enhanced Israel’s operational capabilities, ensuring consistent access to advanced weapons and intelligence.</p> <p>Operational Strategy: Israel employs pre-emptive strikes and rapid responses to perceived threats, focusing on maintaining technological superiority overall regional adversaries.</p>
<p>The U.S. Pledge of Protection</p>	<p>The U.S. committed to protecting maritime navigation in the Arabian Gulf during the Tanker War, mainly after Iran attacked oil tankers. This culminated in Operation Praying Mantis, where the U.S. engaged directly in combat with Iran.</p>	<p>U.S. commitment to Israel’s security remains a cornerstone of its Middle East policy, encompassing military aid, advanced weapons, and diplomatic support. The U.S. consistently reaffirms its pledge to Israel’s defence, backing Israel’s right to self-defence as a key aspect of its regional strategy.</p>

The Pattern of Iranian Military Operations During the Tanker War

Iraq initiated its first attacks on Iranian oil tankers as early as 1981, during the initial phase of the Iran-Iraq War, targeting five tankers that year. These attacks intensified over the next two years, with Iraq carrying out a total of 22 attacks in 1982 and 16 in 1983. During this period, Iran lacked the capability to retaliate against Iraqi shipping, and as a result, no Iraqi vessels were targeted, as illustrated in the figure below.



The data shows that Iranian retaliatory actions remained minimal until 1984, marking the formal beginning of the Tanker War. Before this point, the conflict was characterised primarily by one-sided Iraqi assaults. However, once Iran joined the battle, its attacks quickly escalated, surpassing Iraq’s offensive operations at a significant rate. In the first year alone, Iranian attacks tripled, with 53 strikes compared to only 18 by Iraq. The intensity of Iranian operations peaked in 1987, reaching 91 attacks—averaging nearly one strike every four days throughout the year. Interestingly, by the final year of the war, Iraqi attacks had ceased entirely, while Iranian operations continued relentlessly, reversing the initial trend. By the war’s end, Iran had carried out 282 attacks compared to Iraq’s 208, a 36% increase in Iranian strikes over the total Iraqi assaults.

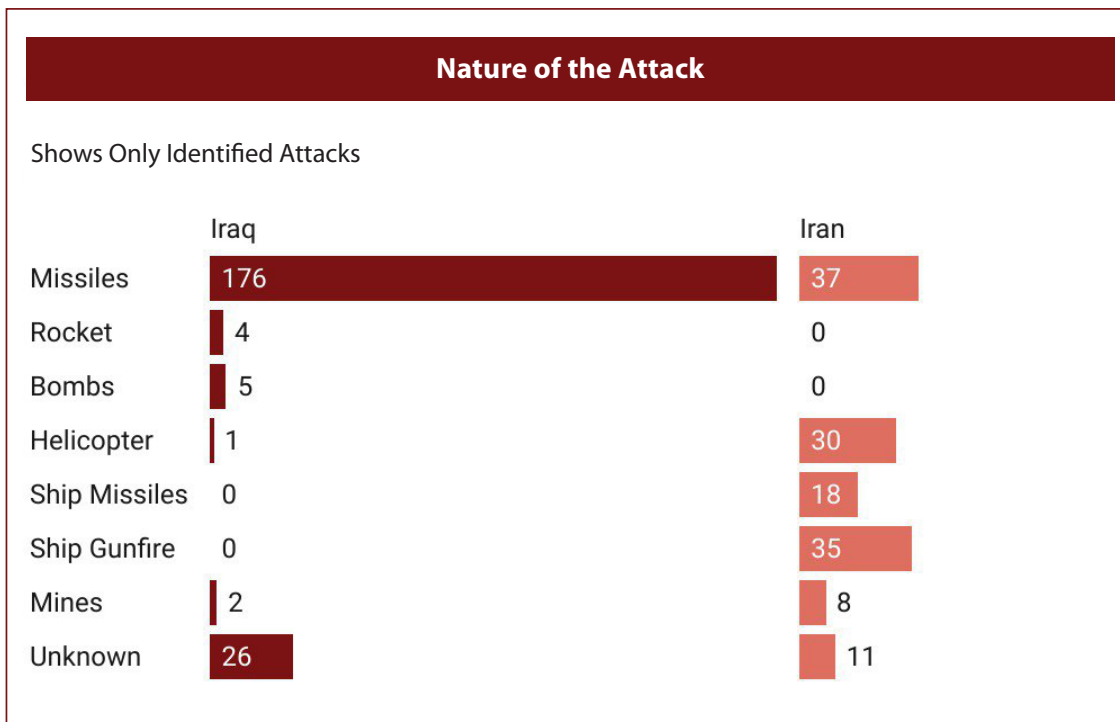
These dramatic shifts in the conflict stemmed from two key factors:

1. Prior to 1984, Iran lacked the resources needed for large-scale tanker attacks. The country did not have sufficient long-range fighter aircraft or anti-ship missiles to target Iraqi ships effectively. Additionally, the Iraqi navy maintained control over the Arabian Gulf, severely limiting Iran’s ability to conduct conventional naval operations. During this period, Iran was also heavily focused on defending its territory against the Iraqi ground invasion.

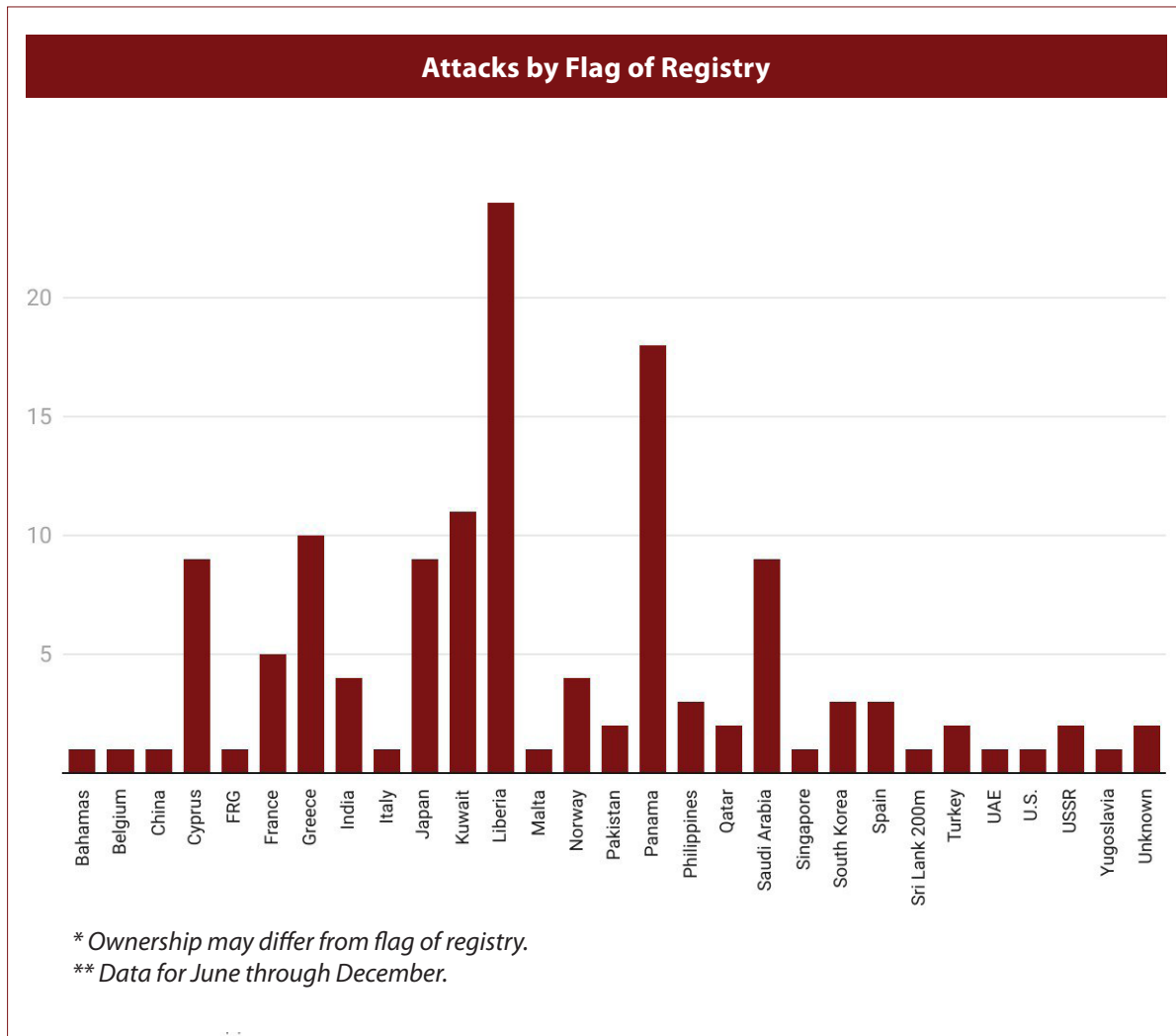


2. As Iran adapted to the demands of land warfare, it sought a more balanced stance at sea. However, strict Western arms embargoes hindered Iran’s ability to acquire advanced weaponry, forcing it to turn to China for “Silkworm” surface-to-surface missiles and “Sea Killer” missiles. Iran also adopted asymmetric tactics, relying heavily on small boats and sea mines—cost-effective yet highly disruptive strategies. This combination of unconventional and low-cost methods proved devastating for Iraq and its Arab allies, eventually compelling Iraq to halt its tanker strikes to persuade Iran to cease operations, which only occurred after Iran suffered a devastating blow that threatened its capacity to continue the war.

The figure below categorises the various types of attacks based on the weapons used:



The above analysis highlights that from 1981 to 1984, Iran endured sustained strikes while it worked to build its capabilities under Western restrictions. This led Iran to adopt alternative, low-cost strategies to level the playing field, a tactic that may also explain its current restraint following the assassination of Ismail Haniyeh. Iran’s limited response capacity is partly due to its lack of advanced offensive and air defence systems against Israeli aircraft and drones. This has compelled Iran to seek support from Russia, acquiring S-400 systems to bolster its defences against Israeli capabilities. Additionally, it’s relevant to consider the nationalities of the ships targeted by strikes, as illustrated in the following figure:



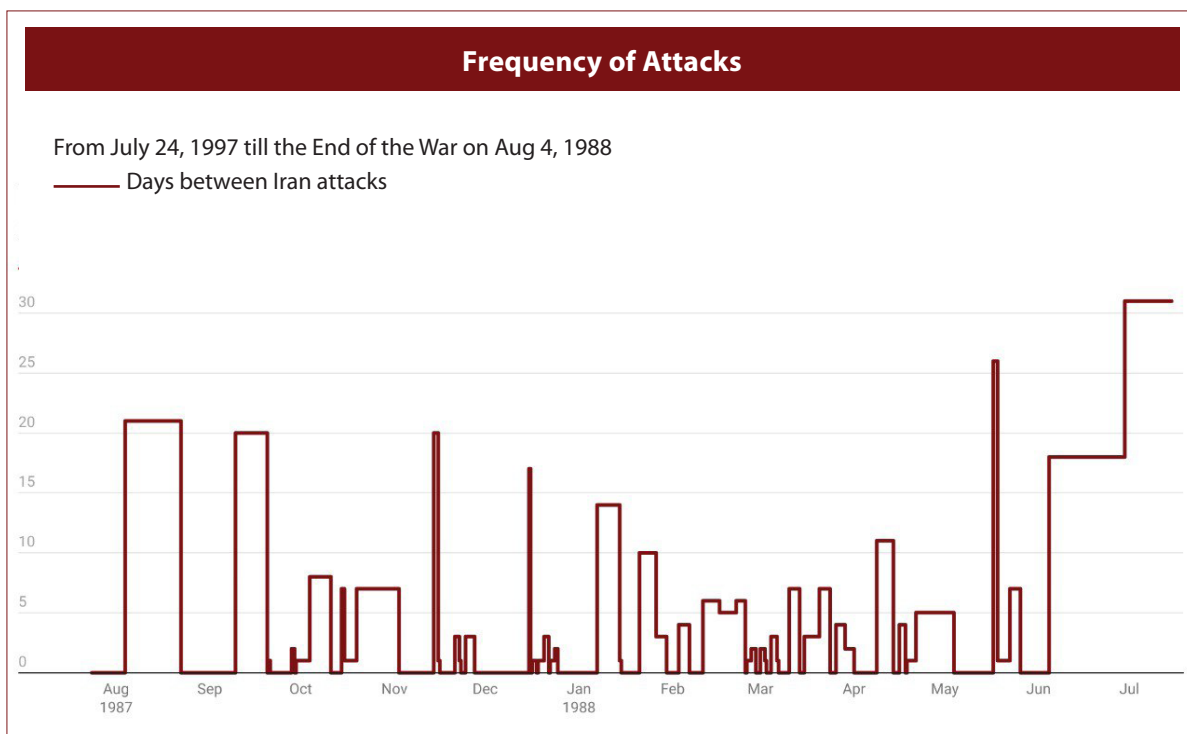
The figure reveals that Iranian attacks affected vessels flying the flags of 29 different countries. However, this number could increase if we account for the actual ownership of the vessels. Many shipping companies register their vessels in Liberia, the Bahamas, Panama, and Greece to benefit from tax advantages, lower crew costs, and streamlined registration procedures. The affected ships were not concentrated in one region but represented a broad spectrum of nations, including the United States, Western countries, and the Soviet Union—then major global powers. Interestingly, even a Chinese ship was struck, despite China supplying Iran with missiles, as mentioned earlier. It’s also worth noting that, in July 1987, the U.S. launched Operation Earnest Will to escort and protect these ships, yet this did not deter Iranian attacks.

In a contemporary context, Iran is employing a similar strategy through its Houthi proxies in Yemen, disrupting navigation in the Bab El Mandeb Strait for months and causing significant disruption in the Red Sea. However, given the diplomatic de-escalation efforts with its neighbours, Iran is unlikely



to target or obstruct navigation in the Gulf or beyond directly. Furthermore, U.S. military bases in the region remain a potential flashpoint. Should the U.S. engage directly in support of Israeli forces, Iran might respond through strikes—either by its forces or via proxies in Iraq and Syria.

Finally, when examining the sequence of attacks from mid-1987 to the war’s end in August 1988, we see that Iran launched an attack roughly every three days on average after four years of conflict. **The figure below shows the rate of Iranian strikes during this period:**



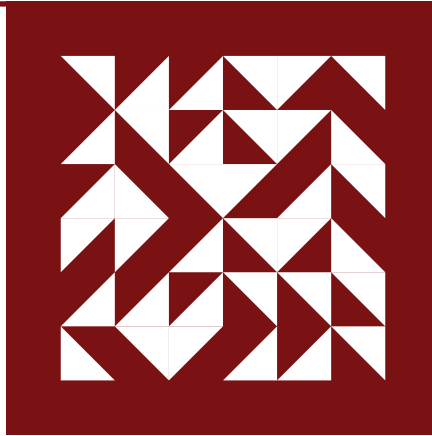
The figure illustrates that Iran pursued a long-term strategy of attrition, aiming to drain its opponent’s military and political resources. This persistent pressure eventually forced Iraq to cease its attacks, and it was only U.S. intervention that curtailed the continuation of Iran’s assaults until the war’s conclusion.

The Expected Iranian Response Pattern

The analysis above suggests that an Iranian response is inevitable, though the specifics—how, when, and where—remain uncertain. The discussion centres not on whether Iran will respond, but on the nature and timing of its retaliation. Based on this, several plausible scenarios emerge, providing insights that, while not definitive, can guide expectations regarding Iran’s potential actions:



- **Direct Response to Israeli Attacks with Strategic Delays:** Any delay in Iran's retaliation should not be interpreted as hesitation or retreat. Instead, it reflects Iran's intent to carefully prepare before engaging in a hasty or impulsive confrontation. As historical precedents suggest, Iran often takes extended preparation periods, amassing the necessary resources and enhancing its offensive capabilities before striking back. In the current scenario, Iran is likely focusing on acquiring longer-range drones and faster missiles while relocating these weapons to strategic launch sites under its allies' control.
- **Extended Preparation Period:** The ongoing delay in Iran's response likely reflects its strategy of prolonging the preparation phase, possibly for several months, to accumulate sufficient capabilities. This preparation includes deploying advanced drones and faster missiles to territories controlled by its proxies, ensuring a more potent and coordinated strike.
- **Introduction of New Weapons:** A consistent pattern in Iran's responses is the deployment of upgraded weaponry, such as more advanced drones and missiles that are cost-effective compared to Israeli air defence systems. This approach aligns with Iran's emphasis on asymmetric warfare, where lower-cost, unconventional methods can yield a significant impact.
- **Indirect Strikes from Proxy Territories:** Iran is unlikely to launch its response directly from its soil. Instead, the retaliation may originate from Lebanon and/or Yemen, with Iraq and Syria being secondary options. By leveraging these locations, Iran can avoid provoking regional partners like Saudi Arabia and bypass the extensive U.S. air defences in the Gulf, Iraq, and Syria. This strategy preserves Iran's deterrence capability while reinforcing its leadership within the axis of resistance.
- **Sustained Military Operations:** Iran's response may involve successive military operations that could span months rather than a single, decisive strike. These actions would likely continue until a ceasefire is reached in Gaza and Lebanon, particularly if Israel initiates broader military campaigns in those areas.
- **Protracted Guerilla Warfare via Proxies:** Following its initial direct response, Iran's proxies might engage in a prolonged conflict designed to wear down Israel's military and economy. Continuous attacks could compel Israel to negotiate a comprehensive settlement with the broader resistance axis.
- **Avoidance of Direct Confrontation with the U.S.:** Iran will aim to avoid direct conflict with the U.S., mindful of the lessons from past encounters, such as Operation Praying Mantis. Nevertheless, this caution will not prevent Iran from pursuing its strategy against Israel, as indicated in earlier assessments.



Strategic Estimates

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