

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

This transcript was edited for clarity.

ROBBINS: All right, good afternoon. My name is Elizabeth Robbins, Vice President of Communications here at the Foundation for Defense of Democracies. FDD is a nonpartisan research institute focused on national security and foreign policy. As a point of principle, we do not accept foreign funding and we never have.

Thanks to our panel for briefing us today on Israel's strike on Iran and what's being missed. Here are brief biographies on each of our panelists.

Dr. Jonathan Schanzer is FDD's Senior Vice President for research. He is a Middle East scholar specializing in Israeli security issues and the Israeli-Palestinian conflict, and he formerly served our country as a terrorism finance analyst at the U.S. Treasury.

Bradley Bowman is Senior Director of FDD's Center on Military and Political Power, where he focuses his work on U.S. defense strategy and policy. He also served our country as a top national security advisor in the U.S. Senate and before that in uniform as a Black Hawk pilot and a West Point assistant professor.

Behnam Ben Taleblu is an FDD Senior Fellow specializing in Iranian security and political issues including Iran's military capabilities and its ballistic and cruise missile capabilities. He is a native Farsi speaker. And like our other panelists, he has frequently briefed staff and testified before Congress.

Lastly, Dr. Saeed Ghasseminejad serves as FDD's Senior Iran and Financial Economics Advisor, born and raised in Iran. He specializes in Iran's economy and financial markets, sanctions and illicit finance.

So let's get going. Today's conversation is on the record. Our panelists will each provide insights and then take your questions. You're welcome to submit questions via chat at any time or raise your hand to be recognized after initial comments. Over to you, Jon, to set the stage for this conversation.

SCHANZER: Thank you Beth, and thanks for all of you for joining today. I'm just going to briefly recap what we now know based on the conversations that we're having with folks that are in the Middle East. As everybody knows, Israel was attacked on October 1st, 181 ballistic missiles from the Iranian regime. The Israelis took some time to respond, more than three weeks to figure out what their strategy would be. Some of that was the result of conversations with the White House that actually watered down or at least narrowed some of the targets that they had in mind. It may have been further delayed by a day or two as a result of those leaks from what we believe to be the Pentagon, that document that was posted on a Telegram channel detailing some of Israel's capabilities as well as its possible targets.

When the Israelis did finally respond on Friday, they flew not over allied territory such as Jordan or even nominally Saudi Arabia. They flew over hostile territory. They flew through Syria. They flew through Iraq. Along the way, they were engaged by some of the Russian-made air defenses that were based in those countries. The Israelis were able to neutralize the air defenses there. And when they got to Iran, they did much the same, taking out a large number of the S-300 systems that were trying to take out their aircraft from the sky. Those aircraft, I should note, it was a significant number. Estimates are more than a hundred aircraft were scrambled out of Israel on Friday evening. These aircraft included F-15s and F-16s, but also included aircraft for refueling, search and rescue, as well as electronic warfare and perhaps some other aircraft that our Senior Director for our Center on Military and Political Power, Brad Bowman, might be able to talk about. There were unconfirmed reports of American aircraft in the sky that night, even though the U.S. has adamantly refused to say that it took part in this operation, but they may have been there for learning or for contingency.



FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

The U.S. apparently provided at least some feedback on the targets, unclear whether U.S. intelligence played any role, but what happened was, as we saw two or three waves according to most reports. The first wave was about engaging the air defenses on the ground. After that, we began to see strikes against targets inside Iran related to its military program, solid fuel mixers involved in the production of ballistic missiles, other factories involved in some of the guidance systems for said ballistic missiles, as well as other elements of that as well.

The goal as we understand it was essentially to weaken Iran's defenses in the event of a future wave of attacks. And to limit the total number of ballistic missiles that Iran would be able to fire. You have to remember that they did fire one round at Israel in mid-April and then they fired another round again in October. Each time, the numbers of missiles that have gotten through has gone up, and the Iranians have been learning. What the Israelis are trying to do now is to limit the total amount that they have in their possession, and then force them to be judicious about the total number that they would fire in future volleys.

It's unclear right now whether the Iranians respond. We'll hear from our colleagues momentarily about this. I will just say that in Israel, initially, there was some disappointment that was voiced by former national security officials, people who were saying that they were unhappy with the outcome, probably because you didn't see Iranian oil facilities get hit, which might've hurt the Iranian economy and its ability to fuel the war machine. Also, some lamentation about Israel's refusal or unwillingness or perhaps being forced by the White House to not strike nuclear sites. At the end of the day though, I think once the dust settled, we began to hear from across the national security establishment in Israel that this was a really smart first wave of attacks, that it weakened those air defenses, that it limited those ballistic missile strikes. And that what we're now able to see is if the Iranians do decide to escalate further, the Israelis will have a fairly clear run back into Iran if need be, and I think we probably see the Israelis climb that escalation ladder in terms of other targets.

I'm going to leave it there. Just wanted to do a little recap here of what we've seen. And so from here I'm going to hand it off to my colleague, Behnam Ben Taleblu to talk a little bit about some of those targets that were struck and why.

TALEBLU: Thank you very much, Jon. It's a pleasure to be with you all today.

Today I'm going to try to thread the needle through at least four facilities that you are seeing online on social media. Thanks to a lot of the good imagery put out there by Planet Labs and a lot of the other folks digesting and processing the commercial satellite imagery that has been available. That's several Iran-related military sites. These are sites that contribute to the Islamic Republic of Iran's defense industrial base. Just by way of reminder, the Iranian Ministry of Defense and Armed Force Logistics, MODAFL, is essentially the Iranian Pentagon, but unlike the Pentagon, that's not where all the force planning and the contingency operations happen. The Iranian Ministry of Defense is in charge of a whole host of subsidiaries, some of which are present at some of the facilities that the Israelis reportedly struck, just a few days ago, that are in charge of different production lines for different capabilities that the Islamic Republic has increasingly been able to bring to the fore.

Today, I'll talk about four sites in particular, tactically, and then kind of back end out strategically what the impact of striking those are, as well as of course, what this leaves in the hand of the Islamic Republic.

Top line is that this is a defanging or a handicapping type of operation. As Jonathan just mentioned, this doesn't go after the existing supply of ballistic missiles. The only publicly available number of how many ballistic missiles that the Islamic Republic has is roughly around 3000, give or take, probably a couple of hundred. This is a number put out by a former U.S. government official. And for more than a decade and a half now, the U.S. government has said that the Islamic Republic of Iran is home to the largest ballistic missile arsenal in the Middle East.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

While Iran does have a very, very robust domestic supply chain for producing, procuring and proliferating ballistic missiles, as well as associated technologies for launching these systems, when you look much more closely at the sites, the facilities, the persons that are involved in this supply chain, there are key nodes, are key bottlenecks, and it appears that the Israelis have been able to, probably through intelligence in the past, be able to identify those bottlenecks, target those bottlenecks, which in the aggregate when you thread the needle through those four sites that I'm about to mention, is akin to firing a shot, probably not destroying but damaging, firing a shot at the beating heart of the largest ballistic missile program in the Middle East. That is the top-line, political impact of militarily, what the Israelis have been able to do, and we assume, again, the damage that is being reported in these four different sites and that is verifiable damage or verifiable change in destruction through commercial satellite imagery, is basically what is doing the handicapping or the defanging or the crippling.

The first site that I want to mention, and many of these sites by the way are not in the capital but within the province of the capital of Iran, Tehran, Greater Tehran is just east of Tehran. You may know it by the first word in its acronym, TAKSAZ. You may know it by its entire acronym, TIECO. This is basically one of the major facilities that has been housing, putting together the industrial-scale kind of planetary mixers for Iran's solid propellant ballistic missiles. The big difference in the military utility of solid propellant versus liquid propellant ballistic missiles is that solid propellant systems, once you fuel these projectiles, they're ready to go. They're more road mobile, you can store them. They have greater military utility in short for an adversary. And Iran's single-stage, solid propellant, short-range ballistic missiles have been used in every single public Iranian military operation launched from Iranian territory from 2017 to early 2024. The change when Iran began to target Israel was that it began to include medium-range liquid propellant systems, and slowly the doubling of the volume that Jonathan mentioned in October versus April was because of bringing online and using medium-range solid propellant systems.

And this facility that is in Shamsabad, this is to the east of Tehran, that's a TIECO facility that houses, stores, these large-scale planetary mixers that kind of rotate like the back of a cement truck, for those of you who are familiar with that motion. And the stuff inside, the various chemicals, the various powders, if I have to give you an analogy for it, is quite akin to putting together the powders in the chemicals and mixing them. Kind of like you would have to do if you are buying a pre-made cake mix like a Betty Crocker or a Duncan Hines. By going after these large-scale planetary mixers, you are handicapping the production capacity to be able to put together and produce solid fuel, that when married with oxidizer, it gives you basically that kick for the boost of these more militarily useful ballistic missiles. That is the impact at Shamsabad.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

For the second facility, which is getting more open-source coverage in the days since this strike, is Shahrud. Shahrud is actually not in Tehran province. It is probably the furthest east that the Israelis have struck. It is in Semnan province. For those of you who know, Semnan province is home Iranian space agency sites. That's the allegedly civilian entity that has ties to the Ministry of Defense in Iran that is in charge of the space program. There is a major spaceport there called the Semnan Spaceport, the Imam Khomeini Spaceport, but there is also the Islamic Revolutionary Guard Corps Aerospace Forces, you could say, separate space program, that is actually building and testing solid propellant motors for space launch vehicles or satellite launch vehicles, that is basically a cover for the regime's longer range missile aspirations that allow them to move to a threshold, IRBM, intermediate range ballistic missile, or medium range ballistic missile capacity. The strike against this facility, even though for the past few years it is assumed or reported that they have been able to contribute to the development of motors and boosters and rockets, motors and boosters and casings, even for some of the newer, fancier, flashier, solid propellant, medium range systems that Iran has been using this year like the Kheibar Shekan, for example. It still is a strike at the space program of the IRGC. So in this sense, Israel, if it is confirmed that they struck this facility at Shahrud, actually did the U.S. a favor, and even did the European continent a favor by being able to handicap the future or prospective long-range strike capabilities of the Islamic Republic of Iran's ballistic missile force.

The next two facilities, you've heard their names plenty of times in the press. I'll try to power through them to make sure we're judicious with time. One is Parchin. Parchin is not one site, it's not one facility. It's actually a large military complex. You've heard its name in the news for many years because of nuclear inspections there because of man-made uranium particles found there. Based on the publicly reported commercial satellite imagery available, at least four facilities at the Parchin military complex, meaning four separate buildings, were believed to have been hit. And again, we assume this is the Israeli strike there. Of these four facilities, one of them is a facility that I want to give a shout-out to my friend and colleague at FDD, Andrea Stricker, has a great brief on this, that facility is called Taleghan 2. That, we believe was engaged in explosive testing in the past, or at least high explosive testing, pertinent to the implosion device that the Islamic Republic may be interested in developing for a nuclear warhead down the line. That was tied to the regime's former AMAD program, the successor for the previous weaponization efforts that the regime had taken on to produce a nuclear weapon.

Parchin's other, more clear conventional military utility, is that it was involved, again, in the production of ballistic missiles. While there is mixed reporting in English and in Persian as to what Iranian military contractors are at Parchin, I would point you to an entity known by the acronym, SHIG, Shahid Hemmat Industrial Group. This is in charge of the liquid propellant ballistic missiles in the regime's arsenal. The regime's first ever medium-range nuclear capable ballistic missile capable of reaching Israel was a copy of a North Korean system that entities later, like Shahid Hemmat Industrials Group, which we believe in the past, at least, was present at Parchin, helped the regime stand up on its own two feet.

Finally, the final facility I'll talk to you about today is Khojir. This is also in greater, kind of Tehran province. This is also just like Parchin, east of the city, so well outside city environments. This is also involved in the production of ballistic missiles. For those of you who have heard about Khojir in the past, you've heard about explosions there over the past few years. Sometimes, the regime denies it. Many people believe the explosions there in the past have been sabotaged. It still remains to be seen. But Khojir is interesting because, again, it's not one site. It's several military facilities. It's a complex. We believe that that which exists above ground in a place like Khojir is significantly complemented by an underground tunnel network that also engages in the development, research and production of ballistic missiles, as well as storing of ballistic missiles.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

The partner entity or the sister entity of SHIG, Shahid Ahmad Industrial Group, is SBIG, sometimes Shahid Bagheri or sometimes known as Shahid Bakeri Industrial Group. This is another sanctioned Iranian military contractor. Both of these sister entities are subsidiaries of Aerospace Industries Organization. That is in charge of large-scale domestic ballistic missile production. That is a subsidiary of that same entity we talked about to begin with, the Ministry of Defense and Armed Force Logistics. So there's a clear kind of chain of command here for production.

Israel has been able to strike at the heart of these various different production nodes, and in so doing, not end Iran's ability to produce ballistic missiles on its soil, but significantly delay the regime's ability to produce ballistic missiles on its own soil in the short term, while in the medium-to-long term introducing more challenges for the regime's ability to be able to, as Jonathan said, use these ballistic missiles from its own territory publicly against the contest with involving Israel or U.S. forces in the region, as well as to be able to produce some of these systems for its various arsenals and exile that now exist in the hands of the Houthis in Yemen or Putin in Russia. So, largely, this is a strike with significant military implications, but also in medium to long-term geostrategic implications.

I want to stop there and be respectful of everyone's time, but we can get back into the rest of the weeds later.

ROBBINS: Thanks, Behnam. Over to you, Brad.

BOWMAN: Great. Thank you, Beth, and great to be here with my distinguished colleagues, and thanks to all of you for joining. I'm going to hit kind of a quick smorgasbord, in hopes of hitting on something that might be of value or interest.

Jon Schanzer covered a couple of the operational details. I'll add a few, but he covered most of it there. Just real quickly, starting at the broadest level, I just want to emphasize how quickly the strategic situation has changed in the Middle East since October 7th, date of this horrible attack on Israel, and for months after, were really, I think it's fair to say, that Israel really, understandably, was in reactive mode, of course, just as the U.S. was after 9/11 attacks, and it was on its heels. It wasn't clear to me and others here that they were implementing a thoughtful, concerted, and comprehensive strategy. And that's certainly understandable, given what they had just gone through. And there were real questions.

But just in the last few months, when you look at what Israel has accomplished in terms of the severe degradation of Hamas, Hezbollah being on its heels, and now we've had this Rubicon crossed, in terms of direct attacks between Iran and Israel, first in April, and now again, I think it's not hyperbole to say that we're in a very different strategic situation in the Middle East. You can almost view it as before and after. And by that I mean Iran has been implementing for decades, as we all know, an asymmetrical terror proxy strategy, where they've done most of their dirty work through terror proxies while avoiding the counterpunches and consequences themselves.

But the mask is off, the gloves are off, and Israel has the ability, the will, and the determination to hit directly at the Iranian puppet master. Iran may have thought that Israel lacked the ability or lacked the will. They're no longer suffering from those delusions. I think that makes for a fundamentally different situation that I think is good for the United States and good for Israel and bad for Iran, and that means it's good for the region. So there's a quick broad level analysis.

Jon hit the details of the strike. I mean, more than a hundred Israeli fighter jets, air refuelers, and reconnaissance aircraft. I think I would predict as time goes on, we're going to learn more about this attack, and I think the following assessment will prove accurate: This was a complex multiphase, long-range military operation that was highly successful.

And sometimes in U.S. defense policy strategy circles, if you listen to the conversation, you get the perception from some people that Iran is 10 feet tall, and I think Israel has persuasively demonstrated that the Iranian military is not 10 feet tall. I think what's important is this: What we've seen should inform U.S. policy and strategy discussions going forward, in terms of the reality regarding the Iranian military, which is different, of course, than their ability to implement terrorism.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

The big takeaways are the severe degradation, some say destruction of Iran's strategic air defense system. That was one of my due-outs in the beginning. Were these initial claims hyperbole? The more I dig, the more I'm hearing, the more I believe such claims are not hyperbole. Basically, the S-300 batteries are done. I was skeptical of that. One thing I'm watching going forward is you can have a functional kill and a comprehensive kill. Right? A functional kill of an S-300 battery is if you take out the radar or the launcher, one of the components, then it's not useful anymore and you don't have to hit all of the components. The more I'm looking and the more I'm talking with people who are well-positioned, the more it sounds like we're talking more about the comprehensive side of destruction of the S-300s. So I'm going to continue to watch that, but that's what I'm hearing.

Obviously, the blows to Iran's ballistic missile production that Behnam and others have talked about and many you've reported on, just one note of caution on that. And I said this on the Monday Morning Brief, is that we've got to be careful not to confuse missile production capacity and a severe, or some say crippling, blow to that, but not complete blow, versus Iran's ballistic missile inventory. We know those are two different things, which is a long-winded and fancy way of saying that Iran as Behnam has been saying and knows better than anyone in DC, still has a very large ballistic missile program.

And should the supreme leader decide, I think politically understandably, but strategically foolishly, to launch another major ballistic missile attack at Israel, he would have the missiles to do it, the missile to fire at least as many as they fired on October 1st, which was 200, and we can talk about that if you guys want to.

We also had reports of the hit on the drone production factory and the strikes at Parchin, which is kind of interesting. The Parchin discussion, as many of you know, I worked in the Senate years ago for quite a long period, and I remember what the Iranians said. "Oh, there's nothing going on in the nuclear program at Parchin that's military-related." Right? And so Israel appears to have hit this building, and I do recommend you all check out Andrea Stricker's piece today. It's pretty shrewd (on the part of the Israelis), right? Because either the Israelis are saying, "Oh, okay, you said there's nothing going on there with the nuclear program, then it's just a military target and it wasn't a nuclear target." And so it kind of puts the Iranians on the horns of dilemma, in terms of exposing their previous, I would say, deception about what was really going on at Parchin. So, that's interesting.

Jon mentioned that there were the F-15Is, F-16Is, F-35Is fighters, refuelers, and reconnaissance aircraft. In terms of munitions used, there's some early reporting, we're still trying to confirm a lot of this. We've seen evidence, if you look at some of the video of Python, for those of you who care about this sort of detail, air-to-air missiles. That's understandable. If any Iranian jets got into the air, the Israelis would want to be able to take care of that. So that's why you'd have the air-to-air missile. And then it looks like we may have seen the use of ROCKS or the Air LORA, and we could talk about that more. But the big idea here is that it appears that most of these attacks were standoff strikes launched from Iraq. We saw them hitting systems in Syria to allow the subsequent flow of more aircraft. There's some competing reporting about whether we had F-35s in Iranian airspace or not. We'll see in the coming days.

On the damage discussion, I think it's important to understand, and I just engaged in a little bit of that, what was damaged and what was not. That's very important. But I think on some level, it kind of misses the point for two reasons. One is Israel did such significant damage to Iran's air and missile defense system that whatever they didn't destroy, they have the ability to go back and hit it next time. So, if they didn't get all the air missile defense systems, like one of the big due-outs, as to what degree did they get or not get the Iranian produced strategic air missile defense system. And then we have the short-range and medium-range systems, which could come into the conversations should we start to talk about nuclear program targets.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

But the broader point, one of the broader points is that I think you could characterize this Israeli strike as basically as far as the Israelis could go without getting crosswise with the Biden administration, right? If they'd gone after the energy targets or full, overt, clear nuclear facilities other than with the caveat of parts we talked about earlier, or even regime targets, that we would've had a major, major problem between Netanyahu and Biden. But what they did was the next best thing. They took all that they were given, if you will, by the Biden Administration, and then basically disarmed, if you will, with some possible exceptions, Iran's ability to protect their energy infrastructure.

So if Iran chooses to respond, then Israel is in a perfect position to go back and devastate Iran's energy program, a primary means of revenue that they use to fund the regime, including its domestic oppression and its export of terrorism. And if you look at the timing, you think about the timing, that would come after the U.S. presidential election. So there may have been some timing and political considerations here that also made the Israelis more willing to accept some of the constraints that the Biden Administration was trying to push on them. I'll move to conclude here in just a second. A few other quick thoughts.

Space operations. Back in my time working as a national security advisor to Senator Kelly Ayotte, I remember Clapper and others sitting in the Armed Service Committee talking about, and if you look at the DNI worldwide threats reports back many years ago, they talked about how the primary means by which Iran would build an intercontinental ballistic missile, as Behnam knows better than anyone, is via their space launch vehicle program. So if in fact the early reports coming out are true that we have some damage to Iran's space-related research facility, it might very well be the case that that has set back some degree their space program, which may have some impact on their efforts to use that as a disguise to advance their development or work toward an intercontinental ballistic missile, which is obviously relevant to Americans.

I mentioned the difference between production capacity and missile arsenal.

I would also just highlight... So what you're hearing from me is a pretty impressive military campaign from Israel. There are still some open questions. I would just flag as another note of caution, there's a big difference between hitting a hangar, a building, even an air missile defense system versus hitting a hardened, deeply buried target associated with Iran's nuclear program. That is a very different thing, and one can have the capability to do the former and not have the capability to do the latter, so a note of caution on that.

And the other thing is, two quick last points, is that anything that is not hardened and deeply buried now, one can reasonably expect that Iran is dispersing that as quickly as possible, right? So, if you think of weaponization activities that Behnam knows well can be done in a small room, relatively speaking compared to the enrichment activities. One would assume those were already widely dispersed. They're probably even being dispersed more now. I'm sure the Israelis are watching it, but it's going to increase the intelligence. This was an incredible not only military feat on the part of the Israelis, but an intelligence feat. What I'm saying is that the intelligence task for the Israelis and the Americans is going to become more difficult as the Iranians try to learn from this and disperse valuable assets further.

And speaking of learning, the Iranians, according to some of the imagery analysis out there, they were leaving a lot of their air missile defense sites basically stationary, kind of in a sloppy or arrogant attitude, as far as I can tell, in terms of like, hey, we're never going to get hit at home. And then after the April exchange, we saw them start to move things, but not nearly as much as one would expect. That's the essence of good air missile defense operations, anything that's mobile, making it as mobile and unpredictable as possible, so the adversary doesn't know where it is and you can't hit it. I would expect they've now thoroughly learned that lesson. And then one last comment on, and then I'm done, the Russia angle. There was a report in the Wall Street Journal I thought was good that I tweeted it, that let's not miss from an American perspective what just happened here.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

You had American-made F-15Is, F-16Is, and F-35Is, yes, flown by incredibly capable Israeli pilots, yes, with Israeli enhancements, that just dealt a body blow to Russian-made S-300 air defense systems. So Russian foreign military sales were already in a freefall. One might expect that to increase in the future. And one wonders whether some of the countries around the world that have been purchasing Russian weapons and air and missile defense systems might want a refund... Yes, an S-300 is not an S-400, but I'm thinking about India and their decision to buy S-400s, and I'm thinking about Turkey that basically chose the S-400 over the F-35 years ago, back in the 2019 timeframe, even though they were warned not to do so. So that decision, in light of what happened last weekend, is looking pretty foolish. And so anyway, there's a lot more where that came from, but I'll stop there. Beth and Jon, back to you both.

ROBBINS: Thanks, Brad. Over to you Saeed.

GHASSEMINEJAD: Thank you very much. I have divided my comments into two sections: Iran's economy and the information warfare areas. So first, reports are emerging that Israel is targeting air defense systems around Iran's energy production ports and refinery sites. This gives us a clearer picture of what messages Israel is sending to Tehran. One of those messages is that it can target the country's economic infrastructure. So this comes at the time that Tehran really has a huge economic problem, still faces the huge economic problem. The Majlis just ratified the general outline of the budget for the next year. It looks like a war budget, which significantly increased the defense budget, cut the welfare subsidies, and tapping into the country's source sovereign wealth fund, anything inflationary. So Iran's economy heavily relies on oil and gas production and export to both produce hard currency and fuel its economy. And there are certain chokeholds in Iran's economy that can create tons of problems for Tehran if it really targets them. Let me list them for you. One is oil export terminals, oil refineries, natural gas production, facilities, ports, and oil production facilities.

And what's important about these targets is that they are fairly concentrated. It means Israel can take out a few [sites], and it will have a very massive effect. For example, on oil terminals, if Israel only targets the Kharg oil terminal, it will knock out Iran's oil exports. On oil refineries, Iran is really already facing a gasoline shortage. It's just a matter of time that they have to increase the price of gasoline in Iran. And the only reason they haven't done that is because they're afraid it will lead to massive protests as it had done before. And again, here, Israel doesn't need to go on target, like tens of targets. If it only targets six large refineries in Iran, it will stop transportation in the country effectively. We saw the report that they took out the air defense system around Abadan oil refinery.

So this is the largest oil refinery in Iran. It has a capacity of 500,000 barrels per day and produces 17 million liters of gasoline. Let's move to natural gas production. So this is mainly concentrated in the South Pars economic zone around the South Pars gas field, and it produces 70% of the country's natural gas production. We are entering the winter. The country always has a natural gas shortage in winter. Iran has it. And so this is a huge problem for the regime if this is hit. Let's move to the ports. There are four ports that really control, handle the absolute majority of Iran's maritime trade through Persian Gulf and Sea of Oman. We saw the report that they took out the air defense system around the Imam Khomeini port. And Imam Khomeini port and the Mashhad port, these are two of the four. They're very close to each other.

And if Israel targets these four ports, it really significantly disrupts the country's non-oil export and its imports. And finally, you have the country's oil protection tools. Targeting them really would affect the country's crude export, petrochemical export. These two are around 70%, 75% of the country's total exports, and other things like the oil product, like the gasoline and others. So targeting the sites will have an immediate effect on the currency and stock market, on transportation sector, on the import and export. And the lag, it will show itself in the labor market. We'll see massive inflation, unemployment, and budget deficit. So I think the message to the regime is clear. And the regime also

understands this clearly too, and this is reflected in how Tehran is managing the information sphere. So when you look at Tehran's management of the information sphere, it really evolved interestingly over the last few days.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

So first, they pursued this total denial strategy. The goal was to deny the strike's success and keep the option of not responding open. Not only that, make it the dominant option. So what's interesting is that Khomeini came out, gave his speech two days later, and he had a rather long rant about the importance of information warfare in the social media. But then he said this. Let me quote it for you. He says, "The second point relates to the malicious act carried out here two nights ago. Well, they made a mistake. They, of course, are exaggerating it themselves. Their exaggeration is wrong, but keep in mind that downplaying it is also wrong. Saying it was nothing, that it wasn't important, and similar statements are also incorrect. The Zionist regime's miscalculation must be disrupted. We must make them understand this. Our officials must assess the situation and decide what's best for the country and nation, and then act accordingly."

So in my view, what he did, he came out publicly against the strategy that the state was pursuing. So in the context of what was happening in the information sphere, what happened, he made it a costly decision not to respond. That's very important. The decision to not respond, he made it very costly. And then he then quickly pushed the burden of responsibility to the officials, which is his favorite move when a decision should be made that's risky or costly or with an uncertain outcome. At Vanak Square, you have billboard. So Vanak Square is a very busy intersection in northern Tehran, a culturally important landmark. So on one side, you have Biden and Netanyahu called war mongers, Jang Talab. On the other side, you have President Pezeshkian, and General Bagheri described as war experts, Jang Balad. And everyone knows Pezeshkian and General Bagheri, they are not decision-makers. They are not even the people with the most important inputs that goes into his decision-making process.

The decision is made by Khamenei himself, and a small number of people in his office, including his son. So Khomeini knows he's at an impasse. He publicly opposed the Infowars strategy that the state was pursuing, made it costly not to respond. He knows the response would be caused by two. And specifically because of this, he's going to use others as a scapegoat. His options he had, the option he has now really range from bad to worse. And the last point, he doubled down, asked the officials to double down on oppression, on control, and we saw very quickly that they executed Jamshid Sharmahd. That was a very unusual move for regime.

Usually, these executions, you have some news about them, but they did that as a message to the domestic population because they are very afraid of what they will do. Or since 2017, you have had like three waves of widespread protests, each time in more than 150 cities and towns. And each time, they really manage to survive only by killing, maiming, and arresting tens of thousands of people. So that's also an area that I know I will be watching in the coming days.

ROBBINS: Thanks. Brad, you've taught me so much over the years about deterrence. Any thoughts on this?

BOWMAN: Oh gosh. Well, thanks, Beth. I've learned from you too. I just, in response to that argument put forward, I would not characterize this as restrained on Israel's part. I'd say it was not restrained. I think it was perfectly designed. Let's put this in historical context, right? This is the largest attack on the Islamic Republic of Iran in Israel's history, and it's the largest military strike, I think, inside Iran since the Iran-Iraq war. So, if both those things are accurate, I don't think it's fair of someone to say this was restrained. If they wanted attacks on their energy infrastructure and their nuclear program, full-fledged attack on their nuclear program, and the regime, then of course they're going to be disappointed. But that would've come at significant costs with the Biden administration. And as I said earlier, it's one thing to hit buildings and S-300 batteries. It's quite another to go after Iran's nuclear program.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

So I think, again, this was as much as Israel could take without having a major schism with the Biden administration, and it sets them up beautifully from a military strategic standpoint for next steps if Iran miscalculates, and I think as I said earlier, the more that time passes and the more information that comes out, the more I suspect that we're going to realize that they did even more damage than we may have realized. Because there's also cyber components and there's other activities that the Israelis may have undertaken that we may never know about, but probably did additional damage. And then getting to the deterrence question. I agree with Jon about what the Israelis are trying to do. They're trying to give, I think with deference to my Iranian-American colleagues, they're trying to give Iran a face-saving way to not start a new round. That's a laudable effort. But I think it's an effort that's a little bit 20th century. And by that I mean with the availability of open source imagery, sooner or later the truth's going to come out, as it already is.

And the fact is that this is an incredibly embarrassing failure of the Iranian military. I mean, when you consider the damage that was done and that every Israeli aircraft and pilot thankfully returned home safely, they accomplished all their apparent objectives, and they did it without the single loss of a pilot or an aircraft. That's what we call back home a "SmackDown." So we can do all this kind of nuanced, "oh, don't say anything so that way we can them a face-saving offramp," but the reality is that this regime understands and will understand even more in the coming days how bad this was. And they're coming to terms with how vulnerable they are. And you say, okay, well then if they're so vulnerable, they're not going to respond. Well, if you understand on the human level, on the natural level, and on the way human psychology works, when people are desperate and vulnerable and in a corner, they don't always act rationally.

So I could see one path forward where it's like, holy cow, I'm not going to go another round with Israel because our whole energy export system is wide open to attack. Or you could say, holy cow, Hezbollah, our strategic deterrent is on its heels. Israel can hit us at will. Now's the time between election inauguration day, we sprint toward a nuclear weapon. You say, well, that's crazy. Well, what's the key determinant in Iran's mind in making that decision, or one of the key determinants? I believe it's their assessment of the degree to which they can conduct nuclear breakout activities without being detected.

I would say that, be real careful with that Iran, because everything we've seen in the last few months tells me, in the last few years, frankly, is that the Israeli intelligence services have Iran thoroughly compromised. But if the Iranians believed that they could do things covertly, that might push them toward that decision. And so I really think we're in an era here of uncertainty and maybe more uncertainty than people realize. Thanks.

ROBBINS: Thanks Brad. Benham, I'm curious about your take on how this is playing within Iran. What are you reading on Iran's state media? There are definitely, extremely few images and videos coming out of Iran, and I imagine nothing is getting to the Iranian people. So what message is the regime in Tehran communicating to the people of Iran about the strike and what are their motivations there?

TALEBLU: Well, to the people, the answer is quite succinct, which is the armed forces general staff of the Islamic Republic mere hours after the Israeli strike had concluded was dealing with the deluge of Iranians on rooftops and social media commentary and seeing the spin in both directions and the pro-regime direction and in the anti-regime direction and really try to come out there and say: unless you see something official from us, it is not real. It was almost a plea. It was an entreatist by Iran's military and political elite to the Iranian people to ignore all of this stuff that Brad very aptly said, is a 21st century phenomenon when we're thinking about deterrence as a 20th century phenomenon. So that was a very interesting plea or entreatist to ignore that which the press, governments, analysts, experts, are dealing with in spades now, which is the real surfacing of commercially available satellite imagery that allows independent open source battle damage assessments.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

Whereas you have the three most important governmental actors, quiet for different reasons, and the quiet from the government of the Islamic Republic, the ability and the attempt to feign normalcy is coming from a position of weakness, not strength. You saw this a little bit on April 19th when the Israelis did their first strike on Iranian territory, which was historic, but they did not claim it. That was one face-saving line of retreat they gave the Iranians back in April. They removed that. Now they own this strike, they claim this strike. But in both instances, Iranian state TV showed tons of pictures of quiet and calm and parks and even played music, for example. So they're trying to do a return to normalcy, but we are where we are. And there's Khamenei, the supreme leader, the Islamic Revolutionary Guard Corps, they're all in a bind because they're in the position now that Israel has put them in, which is they're damned if they do, and they're damned if they don't.

Meaning for the past 20 years in the heartland of the Middle East as well as on the home front, the Islamic Republic has been able to win, win against the Iranian people, win against the Arabs in the region, win against the pro-American order and win against America, even in the region by virtue of denying for everybody a limited war option against them while enabling only for themselves a limited war option. And really with the string of Israeli tactical and military and battlefield successes, as well as the killing of key proxy operatives and the neutering of the regime's axis of resistance and the successful interceptions against the regime's projectile through Israeli and American layered air and missile defense, Iran's national security strategy under the Islamic Republic is collapsing, and fast. And that's why in the dampening period of its conventional deterrent, long-range fire and proxy warfare, you are likely to see an interest and a rise in this potential for a nuclear deterrent.

2024 is not born in a political vacuum. It is the year when you have had the most political current official, former official, military, current military, former military, parliamentarian, politician, government personality, scientist commentary in Iranian media about the need to change their nuclear doctrine and the need to play up fears of weaponization. They're quite literally weaponizing their response or their non-response.

And Saeed mentioned the supreme leader of Iran's speech on Sunday, a few lines above that commentary where he said, "Don't maximize or minimize." He even said there are some, and I want to make sure I get the paraphrase correct, "Some who are saying that we should not be pursuing certain kinds of weapons." Khamenei often speaks in code. I would expect Khamenei's public commentary to continue to hedge in this direction that you've seen political and security elites hedging. But the bind that the Islamic Republic is in today is because the Israelis have been able to gut the regime's ability to engage in deterrence by denial, by going after their air defenses and their ability to engage in deterrence by punishment in the medium to long-term by going after domestic ballistic missile production. And when you remove these two pillars, the regimes, the success behind this national security strategy, that forward deterrent has now just been set back majorly.

ROBBINS: Okay. We'll take a few more questions and then wrap it up. Saeed as discussed, Israel's strike exclusively targeted military sites, not nuclear, not infrastructure sites, likely in response to pressure from the administration. But if Israel makes a future strike that takes out Iran's oil production capabilities, what will the effect be on the world's oil markets in your estimation?

GHASSEMINEJAD: Before answering that, I want to say that what I see that is that Iranians are getting the information through satellite TV and internet. And that's why it's so important for our information warfare to give Iranian access to both internet and satellite TV. And as a result of that, Khamenei actually asked the judiciary and law enforcement to go and persecute people who are scaring people, in his words. And Iran announced that anyone who uploaded picture or videos of Iranian sites being hit or and targeted, they will be prosecuted.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

On the oil market, so Iran is exporting 1.7 million barrels per day. And if you look at the OPEX, excluding Russia and two other countries, the spare capacity, that's more than 5 million barrels per day. So Iran's oil going out of the international market is not going to have a lasting effect on the market and the spare capacity can quickly come in. The question is whether we can prevent Iran from hitting the Saudis and Emiratis and Kuwaitis. So that would be the main question for the international global market on the energy market.

ROBBINS: Okay. Last question to Jon, and I'll have you take us home. For years now Iran's strategy has been to protect itself from direct attack by developing Hezbollah's firepower in Lebanon, essentially holding it over Israel's head like a sword of Damocles. But Israel has appeared to degrade Hezbollah in recent months such that Israel felt comfortable carrying out this attack. So my question is, what should Israel's end goal be with regard to its Northern campaign? You spoke a few minutes ago that Israel is looking at wrapping things up, and Barak Ravid tweeted this morning that Israeli leadership is meeting internally to devise a diplomatic solution to the war in Lebanon. So again, how degraded do you think Lebanon needs to be before Israel will agree to wrap it up on its Northern border?

SCHANZER: Sure. Well, I mean, we're hearing some very interesting reports out of Lebanon today that at least some in Israel are saying that the operations in Southern Lebanon that were designed to degrade Hezbollah's ground capabilities, the Radwan Forces and their plans to invade Israel, that they've been effectively dismantled. That means the tunnels have been destroyed, some of the bunkers have been destroyed, massive amounts of weapons have been found and confiscated. And that's on top of the top leadership that has been killed through various, I would call them ingenious operations, the pagers and the walkie-talkies, but also some of the aerial strikes where Israel was able to display some capabilities that we didn't even know they had, being able to hit targets well beneath the ground in fortified bunkers. So what we're watching really is an evisceration of the capabilities at a ground forces level, chaos at a ground forces level as well, leadership in total disarray.

What's not changed, and I think this is really the key to understanding whether we get to some kind of an agreement in Lebanon. What's not changed is those long distance capabilities. Some of the precision guided munitions that Hezbollah has stockpiled, they still exist. So in other words, if the Iranian regime wants to deploy Hezbollah to use those weapons, we could see a very dangerous escalation on the Northern front. If that does happen, of course, that would likely mean that Israel would truly unleash on Hezbollah as opposed to a very surgical operation that they've been carrying out up until now. I think that would change drastically overnight if we began to see some of these longer range rockets and more precise munitions. If they're deployed, it really changes the war. I think we've arrived at an intersection where the Israelis are saying, look, as long as our people can return home to the North, those 150,000 people, if they can return home to the North of Israel, then they're going to be happy.

And if Hezbollah fights or lives to fight another day, that may be enough for Hezbollah and for the regime itself. But this is kind of a moment of truth. We have hit a very interesting crossroads in this war where Iran has to think about its response, whether it chooses to escalate further, whether Hezbollah in its weakened position wants to escalate and almost certainly invite a disastrous response from Israel that would also do a lot of damage to Lebanon, which up until now has been largely spared. So there's a lot of choices that need to be made right now by some of this top leadership. I think the Israelis are, from what I can tell, listening to the Biden administration, allowing for that off-ramp to its enemies. Even though they have the upper hand from what we can tell, we'll see whether the Iranian regime and we'll see whether its proxies are willing to comply.

FDD Media Call: Israel's Retaliatory Strike on Iran and What's Ahead

October 29, 2024

Featuring Jonathan Schanzer, Bradley Bowman, Behnam Ben Taleblu, and Saeed Ghasseminejad

Moderated by Elizabeth Robbins

ROBBINS: Thanks. We'll end it there. Thanks again to Jon, Benham, Brad, and Saeed, and to all of you for joining. Thanks also to FDD's, Joe, Ellie and Mariam for the backend support. In closing, a reminder that FDD is a nonpartisan research institute focused on national security and foreign policy. We closely monitor the email press at FDD.org. Shoot us an email, and we'll be glad to connect you with our experts. Also, we'll be happy to send you a transcript of this engagement. Thanks and this concludes our call.