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#### **Ronald Reagan Library**

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Withdrawer

DLB 5/18/2006

File Folder IRAN (10/06/1983-03/14/1984)

FOIA

37

**Box Number** 

F01-113

MCDERMOTT,

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| ID Doc Type  | Doc          | ument Description                     | 1                        | No of | Doc Date   | Restrictions |
| 24594 MEMO   |              | RLES HILL TO WIL<br>IAN THREAT        | LIAM CLARK, RE:          | 2     | 10/6/1983  | B1           |
| 24595 MEMO   |              | FORTIER TO JOHN                       | POINDEXTER, RE:          | 1     | 10/6/1983  | B1           |
| 24596 MEMO   |              | TIER TO POINDEXT                      | TER, RE: IRANIAN         | 1     | 10/6/1983  | B1           |
|              | D            | 10/21/2011                            | F2001-113/1              |       |            |              |
| 24597 CABLE  | #0511        | 148Z OCT 83                           |                          | 1     | 10/5/1983  | B1           |
|              | D            | 10/21/2011                            | F2001-113/1              |       |            |              |
| 24598 REPORT |              | I-IRAQ WAR: INCR<br>IIAN GULF OIL EXI | EASED THREAT TO<br>PORTS | 10    | 10/13/1983 | B1 B3        |
|              | PAR          | 7/11/2008                             | <i>NLRRF01-113</i>       |       |            |              |
| 24599 FORM   | SITU         | ATION ROOM NOT                        | E, RE: IRAN              | 1     | 10/27/1983 | B1 B3        |
|              | D            | 3/28/2007                             | NLRRF01-113              |       |            |              |
| 24600 NOTE   | ROBI<br>REPO |                                       | FARLANE, RE: IRAN        | 1     | 2/14/1984  | B1 B3        |
|              | D            | 7/11/2008                             | NLRRF01-113              |       |            |              |
| 24601 REPORT | IRAN         | I: SPREADING ISLA                     | AM AND TERRORISM         | 36    | 2/1/1984   | B1 B3        |
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24602 MEMO

FORTIER TO MCFARLANE, RE: MISCELLANEOUS PROJECTS

2 3/13/1984 B1

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Freedom of Information Act - [5 U.S.C. 552(b)]

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24594 MEMO 2 10/6/1983 B1

CHARLES HILL TO WILLIAM CLARK, RE: IRANIAN THREAT

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24595 MEMO 1 10/6/1983 B1

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KEYWORDS IRAN

PERSIAN GULF

INTELLIGENCE

SUBJECT IRANIAN THREAT TO GULF

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24596 MEMO

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FORTIER TO POINDEXTER, RE: IRANIAN THREAT TO THE GULF

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NLRR FOI -113 # 24598
BY CU NARA DATE 7/11/08

Special National Intelligence Estimate

# Iran-Iraq War: Increased Threat to Persian Gulf Oil Exports

**Key Judgments** 

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for the President

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SNIE 34/36.2-83 13 October 1983

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## SNIE 34/36.2-83

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# IRAN-IRAQ WAR: INCREASED THREAT TO PERSIAN GULF OIL EXPORTS

## **KEY JUDGMENTS**

The full text of this Estimate is being published separately with regular distribution.

## THIS ESTIMATE IS ISSUED BY THE DIRECTOR OF CENTRAL INTELLIGENCE.

## THE NATIONAL FOREIGN INTELLIGENCE BOARD CONCURS.

The following intelligence organizations participated in the preparation of the Estimate:

The Central Intelligence Agency, the Defense Intelligence Agency, the National Security Agency, and the intelligence organizations of the Departments of State, Energy, and the Treasury.

#### Also Participating:

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The Assistant Chief of Staff for Intelligence, Department of the Army

The Director of Naval Intelligence, Department of the Navy

The Assistant Chief of Staff, Intelligence, Department of the Air Force

The Director of Intelligence, Headquarters, Marine Corps

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The seemingly endless war with Iran and Iraq's worsening financial problems are forcing Baghdad to consider drastic military measures. The French sale of five Super Etendard aircraft to Iraq increases the possibility of an escalation of the Iran-Iraq war that could disrupt Persian Gulf oil exports vital to the West. Iraq first will seek to exploit the threat posed by the Super Etendard aircraft through diplomatic steps both to gain financial relief and to pressure Iran to end the war, but we believe these moves are likely to fail. We believe Iraq ultimately will attack oil tankers calling at Iran's Khark Island but most likely after a series of intermediate escalatory steps to increase the military pressure on Iran.

Iraq might delay a military strike if its renewed discussions with Syria on reopening the Iraq-Syria pipeline prove successful. Such a move would gain Baghdad some financial relief.

We are unable to confirm press reports that France has delivered the Super Etendards to Iraq, but we believe that, even if the aircraft have not yet been delivered, Iraq eventually will receive them. Once delivered, the aircraft probably would be combat-ready within a month. France believes the survival of the Iraqi regime is critical to Gulf stability and that delivery of the aircraft may precipitate events to Iraq's advantage, possibly even ending the war. France's reliability as a military supplier is also at stake.

Moreover, late next year France will deliver to Iraq new Mirage F-1 aircraft configured to carry the Exocet missile. As a result, even if delivery of the Super Etendards is canceled, Iraq probably will gain the same capability to hit tanker traffic by late 1984. Finally, Iraq already has Super Frelon helicopters armed with Exocet missiles which could be used in desperation to attack tankers, although Iraq reportedly believes their slow speed makes them too vulnerable.

Iraq would have three objectives in attacking Iran's oil lifeline: to impair Iran's warmaking capacity by denying it revenues, to encourage Iran to begin negotiations to end the war, or, failing that, to force the West to intervene in the Culf. If Iran retaliated against other Culf oil exporters, Baghdad would hope the Western powers would intervene to ensure the safety of all oil exports from the Culf, including those from Iraq.

Iraq may intend initially to use the Super Etendards as a defensive deterrent to shield repairs—which would take six months—on its damaged oil export installations in the Gulf. Iran at any time could take military action to prevent Iraq from repairing its facilities or resuming oil exports from the Gulf. Nonetheless, Iraq then would argue that this places the onus on Tehran for further escalation of the war in the Gulf—giving Baghdad greater justification for using the Etendards to shut down Iran's oil exports.

Baghdad probably would choose to prepare the way for attacks by the Super Etendards on oil tankers by initiating a series of less drastic measures. Such actions would be likely to include renewed public warnings to Iran and neutral shipping, bombing raids against Iranian oil installations—including Khark Island—and increased attacks against Iranian cities, naval units, and shipping in the Gulf. We do not believe such attacks on Iran would encourage it to negotiate for peace.

Once Baghdad began using the Super Etendards against oil tankers, we believe it would conduct several attacks and then pause to assess Iranian and international reaction. Iraq would have difficulty stopping Iranian oil exports for an extended period unless it is prepared to conduct repeated attacks against tanker traffic. International oil tankers would stay away from Khark Island initially, but would be likely to resume loading at Khark if Baghdad were unable to sustain its attacks. Moreover, Iran is likely to reduce its oil prices to offset increased insurance and chartering rates in hopes of encouraging shipowners to continue serving Khark.

We believe Iraq would intensify its attacks on tankers if the initial strikes with the Super Etendards did not result in movement either to end the war or to alleviate Iraq's financial difficulties. Should the Iraqis seriously damage or sink a number of tankers, they would virtually shut down Iranian oil exports from Khark Island. Repeated Iraqi attacks would make it impossible for Iran to entice even cash-starved shipping firms to send their ships to Khark despite substantial price discounts on Iranian oil.

Given our lack of information on Iranian plans and the decision-making process in Tehran, we cannot be confident about the nature of Iran's likely military response. Ayatollah Khomeini has warned publicly that Iran will retaliate against all oil shipping in the Gulf if its own oil exports are disrupted.

We believe that Iran will not strike lower Gulf oil targets or close the Strait to oil exports except as a last resort, and that it probably will take measured responses commensurate with Iraq's phased escalation. Iran has sufficient foreign exchange assets to survive a short cutoff of eil exports. Moreover, by showing restraint, Tehran would place on Iraq the onus of threatening international oil shipping. In addition, Iran probably would want to avoid provoking Western military intervention—in part because it has limited capability to defend itself against a likely Western military reaction.

On the other hand, we cannot rule out the possibility that Khomeini may view Iraqi strategy as the logical culmination of the West's desire to intervene in the Gulf and destroy the Iranian Revolution. He might therefore feel obligated to rapidly escalate the conflict through attacks on Arab oil producers—especially Saudi Arabia—in an attempt to close shipping, regardless of the prospect of military defeat at the hands of the West.

Nonetheless, we expect some Iranian military response. Should Iran retaliate directly against Iraq, it might try to bomb the airbase where the Super Etendards were stationed or attack the Iraq-Turkey oil pipeline. Should Iran decide to retaliate in the Gulf it could choose from several options. Given Iran's capabilities, these are the most likely:

- · Attack Kuwaiti oil facilities.
- Harass shipping in the Gulf or the Strait of Hormuz.
- Strike the oil facilities of Saudi Arabia, the United Arab Emirates, Qatar, or Bahrain.
- · Close the Strait of Hormuz by mining or blockade.

Iran has some capability to initiate any of these actions and even a few attacks against well-chosen targets could do considerable damage to Gulf oil facilities. However, Iran has little capability to sustain coercive measures in the Gulf or in the Strait in the face of Western military opposition.

If Iraq were able substantially to reduce Iranian oil exports, Iran would consider drastic escalatory reactions, including attacks on oil facilities in the lower Gulf or closure of the Strait of Hormuz to all shipping. Iran's Navy is handicapped by numerous problems, but it has the capability to close the Gulf by mining or blockading as long as the action is not contested by Western navies.

Enough excess oil production capacity exists outside the Persian Gulf to absorb the loss of Iranian oil exports and the effect of moderate damage to oil facilities in the southern Gulf. Severe damage to the main Saudi facilities or closure of the Strait of Hormuz, however, would create a worldwide oil shortage and push up oil prices substantially. The

impact on oil markets and the extent of damage to the world economy would depend on the size of the oil supply disruption and how long it was expected to last. It is impossible to make precise predictions without specifying the economic, political, or military scenario involved.

The United States has a large stake in the continued flow of oil from the Persian Gulf in spite of the fact that US oil imports from the Gulf are small (only about 2 percent of US oil consumption). Gulf oil constitutes about 30 percent of oil demand in the non-Communist world as a whole, 40 percent in Western Europe, and 60 percent in Japan. Denial of all or most of the source of supply for a substantial period of time would create a worldwide oil shortfall much greater than that in 1973 or 1979. The United States could not insulate itself from the disruption of the world oil market. In addition, the United States under the International Energy Agency agreement is obligated under certain circumstances to share the burden of a supply shortfall. The longer term impact would depend on how the Persian Gulf political and military situation was finally worked out.

An Iranian blockade or mining of the Strait of Hormuz would impact directly on Oman, whose territory is involved. Oman probably would appeal for Western support, and the other Gulf states would not impede such a move. Direct Iranian air, naval, or commando attacks on the Gulf states would produce varying reactions—from appeals to Iran for forbearance to requests for Western military intervention—depending on the installation attacked and the number and intensity of the attacks. Syria and Libya as allies of Iran would be expected to provide increased political, propaganda, and material support to Iran.

Escalation of military activity in the Gulf would have serious implications for the United States. We believe the Iranians would attack Western naval ships attempting to break an Iranian blockade or to clear mines from the Strait of Hormuz. Although Iran knows it could not halt Western intervention, it would feel its credibility as a revolutionary state was at stake and that, in any case, the West would not invade Iran.

The Khomeini regime also is likely to view even lesser forms of US military intervention as a threat to its interests. We believe, however, that Iran would not call for Soviet assistance, even if the United States directly intervened in the Gulf. If the confrontation in the Gulf were prolonged, Iran's attitude toward Soviet aid would be less certain. Soviet pressure on South Yemeni and Ethiopian leaders to grant base facilities to counter the United States would be likely to increase as a consequence of US military intervention.

The Soviets would welcome any disruption of Western economies, however short lived, caused by an interruption of Persian Gulf oil exports. They also could acquire additional hard currency from oil sales. The USSR would try to capitalize on a Western-Iranian confrontation, probably by offering military aid to increase its influence in Tehran, but such offers are unlikely to overcome basic Soviet-Iranian frictions.

On the other hand, the USSR would be concerned about any buildup of Western military forces in the Persian Gulf. Moscow would increase its intelligence-gathering efforts in the region as tensions mounted and Soviet naval forces in the area probably also would be augmented. If Western airpower in the region were increased, some Soviet forces—particularly air and air defense units in the southern USSR—would probably be placed on alert.

Limited Western strikes against Iranian airfields or ports are likely to prompt the Soviets to admonish the West against invading Iran. Militarily, the Soviets would probably step up air defense activities within their borders and might alert and mobilize airborne units and ground forces in military districts bordering Iran. They almost certainly would do so if they believed a Western threat to invade Iran were emerging.<sup>1</sup>

<sup>&</sup>lt;sup>1</sup> For more information on Soviet military capabilities to respond to events in the West, see forthcoming NIE 11/S9-83, Soviet Forces and Capabilities in the Southern Theater of Operations.

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Box Number

24600 NOTE

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ID Document Type
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ROBERT GATES TO MCFARLANE, RE: IRAN REPORT

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IRAN: SPREADING ISLAM AND TERRORISM

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- B-7 Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]
- B-8 Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
- B-9 Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]
- C. Closed in accordance with restrictions contained in donor's deed of gift.

NSC/S PROFILE CECRET

ID 8402083

UNCLASSIFIED UPON REMOVAL OF CLASSIFIED ENCLOSURERS

RECEIVED 14 MAR 84 09

TO MCFARLANE

FROM FORTIER

DOCDATE 13 MAR 84

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IRAQ

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COMMENTS

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**MEMORANDUM** 

SECRET

NATIONAL SECURITY COUNCIL

INFORMATION

March 13, 1984

MEMORANDUM FOR ROBERT C. MCFARLANE

FROM:

DONALD R. FORTIER

ROM HAS SEEN

SUBJECT:

Miscellaneous Projects

Some random points:

- 1) At the last CPPG on Iran-Iraq we asked the CIA to update their SNIE on threat scenarios. That has now been done. State and Defense are now to key on that paper to refine our options for dealing with four scenarios: a) complete collapse of the Iraqi position; b) a flanking move into Kuwait; c) conventional strikes on the Gulf states; and d) closure of the Straits. We have enriched our thinking on these possibilities over the last week and will give you more substance on this later. For now, procedurally, we will have another CPPG on Monday or Tuesday; and, hopefully, an NSPG toward the end of next week to finally marry the options with final force closure decisions; and the energy strategy with a consultation effort.
- 2) We are encouraging some creative private thinking on Soviet options. It seems increasingly probable to me that the Soviets in the event the Straits are closed will want to carve out a role for themselves. Some of our allies might be sympathetic. The best way to foreclose the opportunity for pressure to develop on that point is to move very quickly ourselves. This is an argument you might wish to use in your private initiatives on reducing force closure times.
- 3) The broader foreign policy strategy memo we discussed privately should be ready by the end of the week.
- 4) An action plan is being worked on the Afghan defector issue pursuant to our directive. Raymond and Sestanovich are following this with guidance from me. Stilwell is campaigning to head the delegation that meets with Zia. On this particular issue, I think that may not be so bad. State does not object, provided they have a man on the team. Do you have a problem with this?
- 5) John asked me to hold a CPPG on Radio Marti this week in his absence -- the theory being to save you until the end. I am planning to do so on Thursday if this meets with your approval.

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NLRR F01-113 # 24602

BY LOT NARA DATE 5/29/08

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## SECRET

- 6) Some time ago we got a very credible intelligence report of an F-15 arriving at a Libyan air field. This issue has suddenly been forgotten by the bureaucracy. Unless you object, I intend to call Ikle to ask him to pursue this report through Defense contacts in Saudi Arabia. It may turn out that we cannot even adequately inventory F-15 movements in Saudi Arabia. If so, we ought to find that out sooner rather than later and correct the deficiency.
- 7) We are detaining a shipment of potassium flouride (used as an ingredient in chemical weapons and insecticides) bound for Iraq. I have been in touch with State and Commerce to ensure that necessary actions are taken to hold this material at Kennedy Airport.
- 8) Your further comments on the foreign policy speech draft would be welcomed.
- 9) The Turkish legislative strategy effort is making some headway.