

Political and strategic scenarios after the attacks in Saudi Arabia

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In the early hours of last Saturday the Abqaiq oil-processing facility and the Khurais oilfield in Saudi Arabia were hit by a series of drones and cruise missiles. In the first instance, the Houthis claimed responsibility for the attack, and it was a reliable claim since they have repeatedly launched rockets, missiles and drones from Yemen towards populated areas in Saudi Arabia. However, later it appeared that Iran could be blamed. On 18 September Saudi Arabia's defence ministry showed the weapons' wreckage that should prove Iranian involvement. Yet, the Saudi military briefing had little to say about whether the weapons used in the attacks against the Saudi oil installations had actually been fired from Iranian soil or whether they had been fired from South Iraq by Iraqi pro-Iran Shia militias as the range of the missiles may suggest.

It is difficult to say whether this attack can be a first step in an escalation in the Gulf, whether it opens a new phase of instability in the region or whether it is just one of the numerous moment of tensions. However, we can briefly explore the political options of the actors involved.

President Donald Trump said on Wednesday that the U.S. has "many options" in addition to military strikes. The Trump administration does not appear to want an all-out war with Iran but needs to re-establish deterrence in the region and it can do it in two ways: covert options, by using drones, bombers or Special Forces; or substantially increasing economic sanctions against Iran. U.S. sanctions have already cut Iran off from the global financial system, pushing the country's inflation rate above 40 percent, so what's left to sanction? The only major economic response left would be a full secondary sanctions ban that would amount to a virtual economic blockade of Iran, that is a prohibition on countries or companies that do virtually any business with Iran from doing business with the United States, even in aspects like humanitarian aid that are nominally permitted.

Saudi Arabia is fast recovering from this attack. The attack cut the Saudis' daily oil production by 5.7 million barrels, nearly 6% of the global oil supply, but the Saudis argued that they will be able to restore the production by the end of September. However, the strikes harmed Saudi Arabia, Iran's adversary in Yemen and a key rival in the wider Gulf region, in another way. It revealed the vulnerability of the kingdom's oil industry. Moreover, the attack has showed the military weakness of a country, Saudi Arabia, which has not been able to protect critical oil facilities from drones and low-flying missiles despite the fact that it is a key ally of the U.S. with important investments in the defense sector.

Iran could also respond to possible U.S. and Saudi strikes by attempting to interrupt oil transportation. In the past months, the Islamic Revolutionary Guard Corps navy has demonstrated its willingness to seize foreign tankers in the Persian Gulf and the Corps could also disable oil tankers with mines and other explosives. Iran could also attempt to close the Strait of Hormuz, at least temporarily.

At the moment it is difficult to predict whether this attack will lead to an escalation or whether it will remain just one moment of high tension in a very complex situation. What we can certainly say is that an escalation in the Persian Gulf would also threaten Chinese and European energy security. Both German Chancellor Angela Merkel and British Prime Minister Boris Johnson have emphasized the importance of avoiding further escalation of tensions in the region; consequently, if the U.S. wants to strike Iran, it will have to do it alone. In contrast, an escalation will increase the oil price and as result it will benefit Russia with an estimated increase of \$7.5 million in revenue. Finally, the strikes have demonstrated that the strategic threat from rather inexpensive conventionally armed weapons can be a serious one, also because it can be posed by militias linked to a State, in this case Iran. And this may represent a relatively new kind of international threat.