

Type:	Threat	Version:	1.0	Classification:	Restricted
Created:	20241002			Status:	Live
Title	AMBREY THREAT CIRCULAR – 02/10/2024				



# AMBREY THREAT CIRCULAR – IRAN STRIKES ISRAEL

## Source:

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### A. Executive Summary

- On the 1<sup>st</sup> of October 2024, Iran launched missiles aimed at Israeli military and intelligence bases in response to the killing of senior figures of the Iran-led “Axis of Resistance”
- No merchant vessels or port infrastructure were damaged. Video footage reportedly depicted a gas rig burning off Ashkelon, Israel. The cause was not confirmed.
- Israeli officials stated that Israel will retaliate against the attack – an Iranian response could impact energy infrastructure and international trade in the Strait of Hormuz, Arabian Sea, Bab el-Mandeb Strait, and offshore Israel.
- Israeli shipping and offshore facilities are assessed to be at heightened risk – US shipping at elevated risk

### B. Situation

On the 1st of October 2024, Iran launched a missile attack against Israel. Iran’s Islamic Revolutionary Guard Corps (IRGC) stated to have launched an estimated 200 missiles, targeting Israeli military and intelligence infrastructure. The airstrike had been anticipated since the killing of Hamas’ political leader Ismail Haniyeh in Tehran, Iran, on the 1st of July 2024. Since Haniyeh’s death, the Iran-led “Axis of Resistance” consisting of Gaza-based Hamas, Lebanon-based Hezbollah, Yemen-based Ansar Allah (“the Houthis), “Islamic Resistance” in Iraq, and militant factions in Syria as well as Bahrain lost further leading figures. Among them were the Secretary-General of Hezbollah, Hassan Nasrallah, and the Deputy of Operations for the IRGC, Abbas Nilforoushan. Both were killed in an Israeli airstrike on Beirut, Lebanon, on the 27th of September. Compared to the first-ever direct Iranian assault on Israel on the 13th of April, more missiles were launched while no unmanned aerial vehicles (UAVs) were reportedly used. Israeli officials are not disclosing details of the missile impacts, pending investigations regarding the extent of damage sustained by Israel. Video footage from the night confirmed several impacts. Some footage indicated a gas rig offshore Ashkelon, Israel, was burning. The cause of the fire remained unknown at the time of writing. Chevron had temporarily halted operations at its Tamar gas field, 13NM off Ashkelon, in October 2023, but reportedly resumed operations in November. Chevron reportedly halted operations during the missile attack but has since resumed activity. Israel’s air defence systems were activated across Israel, with interceptions causing falling debris. The debris killed one Palestinian in the West Bank, injured two Israelis, and caused damage to buildings. Debris also fell in Jordan, indicating what was later confirmed – Jordan contributed to the interception of missiles aimed at Israel. The US, UK, and France also confirmed their involvement in the defence of Israel’s airspace with the US stating their naval assets in the region launched a dozen interceptor missiles.

Israel’s Prime Minister, Benjamin Netanyahu, issued a statement threatening an Israeli retaliation for the missile attack. Netanyahu stated: “Iran made a big mistake – and it will pay for it” adding that Israel “will keep to the rule we have determined: Whoever attacks us – we attack them.” Israel’s Defence Minister, Yoav Gallant, similarly stated: “Iran has not learned a lesson – those who attack the State of Israel pay a heavy price.” In April, Israel’s retaliation was limited and of a symbolic nature. A repeat of April’s sequence of events is assessed to be unlikely. National Security Advisor of the United States, Jake Sullivan, stated that there “will be severe consequences for this attack and we will work with Israel to make that the case.” US President, Joe Biden, stated that possible Israeli retaliation was under “active discussion”. The IRGC additionally stated that if Israel “reacts to Iranian operations, it will face crushing attacks.”

While an Israeli retaliation would highly likely have no direct impact on shipping, offshore facilities in the Arabian/Persian Gulf may be targeted. Former Israeli Prime Minister, Naftali Bennet, stated that “Israel has now its greatest opportunity in 50 years, to change the face of the Middle East.” Bennet subsequently called for retaliation against Iran’s nuclear and oil/energy

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facilities. Reportedly, Iran had been threatened with the same prior to the Iranian missile strike. While destructing Iran’s nuclear and energy facilities are presented as a once-in-a-generation opportunity, it bears risks of uncontrolled escalation. Likely alternatives for Israel’s retaliation include targeted killings of leading IRGC members and nuclear scientists in Iran. A direct attack on nuclear facilities is one of several options reportedly under review between Israel and the US. A worst-case scenario would be the inclusion of Iran’s ports onto a target list for the energy export infrastructure, increasing the threat to shipping calling Iranian ports.

Following an Israeli retaliation, Iran would likely respond in kind by targeting Israeli assets, especially energy infrastructure, throughout the region. A closure of the Strait of Hormuz has been threatened in the past and is assessed unlikely if the US refrain from actively engaging Iran. However, the targeting of Israel-affiliated shipping is possible. An unlikely direct confrontation between Iran and the US would highly likely include attacks on US military bases in the region as well as US shipping in the Arabian Sea, Gulf of Oman, and Arabian/Persian Gulf, while closing the Strait of Hormuz.

An escalation of the “Axis of Resistance” operations in wake of a potential Israel retaliation for the Iranian missile strike is assessed likely. Hezbollah and “Islamic Resistance” in Iraq are likely to increase the quantity of attacks throughout central and northern Israel. Hezbollah may also conduct operations against the Leviathan gas field offshore northern Israel. Air defences of the gas field have been sufficient on past occasions. The Houthis are highly likely to continue targeting merchant shipping. In recent weeks, the Houthis focused on launching long-range missile and UAV attacks on central Israel, however, caused physical damage to two merchant vessels in their latest attack on the day of the Iranian missile strike.

### C. Threat Update

The Houthis’ target profile is assessed to remain stable, with a focus on Israel-affiliated shipping, US- and UK-owned shipping, and companies trading with Israel. The Houthis are assessed to have the ability to increase their targeting operations to the northern Red Sea, offshore activity in the eastern Mediterranean, and expand the established target profile.

As Israel has begun limited incursions into southern Lebanon, with Hezbollah increasing missile launches toward central and northern Israel. Haifa port and offshore facilities are at increased risk of direct targeting and collateral damage. Israel-affiliated shipping is assessed to be at heightened risk throughout the region, with attacks having previously occurred in the Red Sea, Gulf of Aden, Arabian Sea, and Strait of Hormuz. US shipping is additionally assessed to be at elevated risk pending potential further escalation in the region.

### D. Mitigation

- Ambrey recommends a thorough affiliation check as part of a transit risk assessment is performed for all Red Sea, Gulf of Aden, Arabian Sea, Gulf of Oman, Arabian/Persian Gulf, and Indian Ocean voyages. This is being performed as a matter of course for all Ambrey tasks.
- Vessels assessed to be at high risk are advised to re-consider their voyage plans.
- Vessels calling Israeli ports are advised to avoid anchoring/drifted within Israeli territorial waters where feasible.
- Vessels are advised to designate a Safe Muster Point above the waterline and a central within the accommodation block as possible. It is recommended to reduce crew deck movements and bridge manning to a minimum in areas of heightened risk of aerial attack.
- Prior to a boarding, distress calls should be issued to inform relevant authorities. During a boarding by Iranian forces, the crew are advised to comply with boarding forces’ commands.
- AIS and other signals emission policies should be reviewed prior to transiting the region.
- Companies should be prepared to make decisions quickly in the event of being targeted. They should practice Crisis Management responses to likely scenarios with all relevant stakeholders.

### E. Contact Information

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