

GLOBAL SECURITY AND DEFENSE DEVELOPMENTS WEEKLY

Region: Middle East | Europe | Indo-Pacific | Global

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Scope: Security | Energy | Diplomacy | Defence Industry

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Executive Assessment

The military confrontation between the United States, Israel, and Iran has escalated into a sustained high-intensity conflict characterized by strategic bombing operations, retaliatory missile exchanges, and expanding maritime tensions. U.S. long-range strike operations are being conducted through a combination of forward-deployed and continental-based bomber forces. RAF Fairford has become the central operational hub for these missions, hosting a significant concentration of B-1B and B-52H bombers while B-2A bombers continue to operate from the United States. This forward deployment indicates a deliberate effort to maintain persistent long-range strike capacity against Iranian command infrastructure, radar networks, and underground missile facilities.

The coordinated air campaign conducted by the United States and Israel is visibly degrading Iran's ballistic missile launch capability. Iranian launch rates have declined substantially since the opening phase of the conflict, indicating the effectiveness of sustained strikes against missile launchers and associated infrastructure. Despite this degradation, Iran continues to demonstrate the capacity to conduct retaliatory attacks using both ballistic missiles and unmanned systems targeting U.S. military installations across the Gulf region. The continuation of these attacks suggests that while Iran's launch capability is being reduced, it retains enough operational capacity to sustain periodic strikes.

At the same time, Iran appears to be expanding the confrontation into the maritime and energy domains as a means of strategic pressure. Mine-laying activities and attacks on commercial vessels in the Gulf and around the Strait of Hormuz indicate an effort to threaten global energy transportation routes and raise the economic costs of the conflict. The increasing number of attacks against commercial shipping has already forced tankers to adopt evasive operational measures, including disabling AIS identification systems during transit. These developments are increasing risks to regional energy infrastructure and global maritime trade.

The conflict is also triggering a significant redistribution of international military assets toward the Middle East and Eastern Mediterranean. NATO has strengthened Türkiye's air defense posture with Patriot deployments following a ballistic missile incident near Turkish airspace. Regional military activity in the Eastern Mediterranean has intensified as multiple European states deploy advanced naval platforms, fighter aircraft, and surveillance capabilities. The United Kingdom, France, Italy, Germany, Spain, and the Netherlands are all reinforcing their presence in the region, reflecting growing concerns about escalation and the need to secure maritime routes and allied infrastructure.

Beyond the Middle East, the crisis is influencing broader global security dynamics. European security remains shaped by ongoing high-intensity fighting in Ukraine while strategic attention is simultaneously shifting toward Arctic military operations as the United States conducts under-ice submarine deployments. In the Indo-Pacific, China continues expanding its naval capabilities with the commissioning of additional advanced destroyers, while North Korea maintains an active testing cycle for sea-based cruise missile systems.

The conflict is also accelerating defense procurement and modernization efforts worldwide. Significant investments are being directed toward missile defense interceptors, precision-guided munitions, air defense systems, maritime capabilities, and advanced surveillance platforms. These procurement decisions reflect both the immediate operational demands generated by the conflict and a broader strategic trend toward strengthening military readiness and deterrence capabilities in an increasingly contested global security environment.

U.S. ATTACK ON IRAN - MIDDLE EAST DEPLOYMENT

The military confrontation between the United States, Israel, and Iran has intensified, characterized by a massive strategic bombing campaign and a widening conflict in the maritime and energy domains.

- **Strategic Bomber Operations:** RAF Fairford in the United Kingdom has emerged as the primary forward hub for the U.S. air campaign. As of March 13, the base hosts 12 B-1B and 6 B-52H bombers, representing approximately one-quarter of the total U.S. B-1B fleet. These aircraft, along with B-2A bombers operating from the U.S. mainland, have targeted IRGC command centers, radar networks, and underground missile facilities.
- **Degradation of Iranian Missile Capacity:** Coordinated U.S. and Israeli strikes have caused a steady decline in Iranian ballistic missile launches, from approximately 350 on Day 1 (February 28) to 25 on Day 13 (March 12). Despite this, Iran continues retaliatory strikes against U.S. bases in Saudi Arabia, Qatar, and the UAE.
- **Naval Warfare and Mine Threats:** Tensions in the Strait of Hormuz have escalated following reports that Iran has begun mine-laying operations to pressure global energy routes. The U.S. Navy has intensified mine countermeasure patrols and destroyed several Iranian naval assets capable of mining operations.
- **Maritime Impact:** At least 16 commercial vessels have been attacked in the Gulf region since the start of the war. Commercial tankers have begun "dark transits" by switching off AIS identification systems to avoid being targeted.
- **Operational Casualties and Risks:** A U.S. KC-135R Stratotanker crashed in western Iraq during a refueling mission following a mid-air accident with another tanker, resulting in four confirmed deaths. Overall casualty figures from the conflict have reached over 1,200 killed in Iran and 570 in Lebanon.

GLOBAL SECURITY & GEOPOLITICAL DYNAMICS

Middle East – Eastern Mediterranean

The Middle East crisis is forcing a significant redistribution of global military assets, impacting security postures in Europe and Asia.

- **Support for Turkey:** NATO has begun deploying Patriot air defense systems to Malatya Erhaç Air Base in Türkiye to strengthen its defense capacity. A ballistic missile launched from Iran toward Turkish airspace was intercepted by NATO assets, with debris falling in Gaziantep.
- **Eastern Mediterranean Deployments:**
 - **Turkey:** Deployed six F-16 fighter jets and advanced air defense systems to Northern Cyprus to strengthen its regional presence.
 - **Greece:** Deployed its new Kimon-class (Belharra) frigates and the frigate Psara. Additionally, F-16 Viper jets have been stationed in western Cyprus to protect the island's airspace.
 - **United Kingdom:** Deployed four additional Typhoons to Qatar and an AW101 Merlin helicopter to Cyprus for airborne surveillance. The nuclear submarine HMS Anson suspended a port visit in Australia to deploy to the Gulf.
 - **Australia:** Deployed an E-7A Wedgetail AEW&C aircraft, tankers, and a C-17 to the UAE.
 - **France:** Deploying a major naval force led by the aircraft carrier *Charles de Gaulle* to the Eastern Mediterranean.
 - **Italy:** Dispatched the frigate Federico Martinengo as part of a coordinated European maritime security mission.
 - **Germany:** The frigate FGS Nordrhein-Westfalen arrived in the waters near Cyprus on March 8, 2026.
 - **Spain:** Deployed the frigate Cristóbal Colón, one of its most advanced naval assets, to the region.
 - **Netherlands:** Prepared the air defense frigate HNLMS Evertsen for deployment to support allied operations.

Europe

The European security landscape is currently defined by a duality of high-intensity attrition and proactive strategic positioning. While active combat persists in Eastern Europe, major powers are simultaneously projecting force into the Arctic to secure long-term geopolitical interests.

- **Arctic Operations:** The U.S. Navy launched Operation ICE CAMP Boarfish, deploying the attack submarines *USS Delaware* and *USS Santa Fe* for under-ice training in the Arctic Ocean.
- **Ukraine-Russia War:** High-intensity fighting continues in Zaporizhzhia and Donbas. However, trilateral peace talks have been postponed at the request of the U.S. due to the prioritization of the Middle East crisis. Reports indicate Russia produced 7 million artillery shells and rockets in 2025.

Asia – Pacific

Developments in the Indo-Pacific point toward medium-term deterrence and qualitative upgrades to maritime strike capabilities.

- **China’s Naval Expansion:** The People's Liberation Army Navy commissioned two additional Type 055 guided-missile destroyers (*Dongguan* and *Anqing*), bringing the operational fleet of these advanced warships to ten.
- **North Korea:** Conducted its second sea-based cruise missile test within a week, launched from its newest destroyer.

GLOBAL SECURITY AND DEFENSE PROCUREMENT AND CONTRACTS

Project / Procurement	Value / Quantity	Source Country / Company	Details
Munition Expenditures	\$5.6 Billion	United States	Total value of munitions used during the first two days of the war with Iran.
E-7A Wedgetail Development	\$2.34 Billion	Boeing (USA)	Contract modification to support the E-7A Rapid Prototype Airborne Mission Segment.

MINTEL WORLD

Conflict and energy consultancy

C-130J (JMATS IV)	\$1.9 Billion	Lockheed Martin (USA)	Maintenance and training system contract for the U.S. Air Force.
M142 HIMARS (FMS)	\$930 Million	USA / Sweden	Potential Foreign Military Sale for Swedish artillery capabilities.
F-35A Lightning II	\$700 Million	Lockheed Martin (USA)	Initiation of production components for Danish Lot 20 and 21 aircraft.
GBU-39 SDB Purchase	\$289 Million / 5,000 Units	Boeing (USA) / Israel	Israeli deal to rebuild precision-strike stockpiles for the IAF.
SM-3 Block IB Interceptors	\$267 Million / 23 Units	Raytheon (USA)	Order to restart the production line, raising the total order to 78 missiles.
Shtil-1 VLS Missiles	\$238 Million	Rosoboronexport (Russia) / India	Procurement of ship-based surface-to-air missiles for the Indian Navy.
Maritime Support Contract	\$163 Million	BAE Systems Australia	Seven-year contract to support critical Royal Australian Navy maritime capabilities.
RCH 155 Howitzers	£53 Million / 37 Units	ARTEC GmbH / UK	Contract for the manufacture of Boxer-based artillery platforms for the British Army.
BrahMos Missile System	Not Disclosed	India / Indonesia	Agreement for the procurement of supersonic cruise missiles for Indonesian maritime forces.
Ghatak UCAV Acquisition	60 Units	India	Recommendation for deep strike and SEAD-capable unmanned combat aerial vehicles.
Project Beehive (USVs)	£10.25 Million / 20 Units	Kraken Works Ltd (UK)	Contract for uncrewed surface vessels for the Royal Navy.
IRIS-T SLM Systems	18 Units	Germany / Ukraine	Additional order to strengthen Ukrainian medium-range air defense.
ASELPOD Targeting Pods	40 Units	Türkiye / Azerbaijan	Ordered for JF-17 Block III fighter aircraft from Pakistan.
TacNet 1.0 Repair	Not Disclosed	Rockwell Collins (USA)	Contract to repair datalink radios for JSOW and Harpoon Block II+ missiles.