

GLOBAL SECURITY AND DEFENSE DEVELOPMENTS WEEKLY

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

Date: 29 March – 4 April 2026

Scope: Security | Energy | Diplomacy | Defence Industry

Classification: Client Confidential

Executive Assessment

The conflict between the United States, Israel, and Iran has escalated into a sustained high-intensity confrontation marked by expanding air campaigns, increased force deployments, and direct losses of high-value assets. U.S. operations continue despite the downing of an F-15E during a strike mission over Iran, with combat search and rescue efforts conducted under contested conditions. Strategic bombing remains central, supported by a mix of long-range bombers, electronic warfare platforms, and close air support aircraft, indicating a comprehensive effort to suppress and penetrate Iranian air defenses. Iranian retaliation has demonstrated the ability to target critical enablers, including the destruction of airborne early warning and refueling assets in Saudi Arabia, exposing vulnerabilities in U.S. force protection.

The operational environment is increasingly shaped by multi-domain pressure. Amphibious and ground forces, including Marine Expeditionary Units and elements of the 82nd Airborne Division, are positioned to support potential escalation scenarios, while special operations forces enhance flexibility for high-risk missions. Iran is simultaneously reinforcing internal control through wartime security measures, reflecting concern over internal stability and intelligence penetration. The persistence of U.S. operational tempo alongside these risks suggests a deliberate strategy to maintain pressure while preparing for broader contingencies.

Maritime dynamics have become a critical axis of escalation, with the Strait of Hormuz emerging as both a military and economic center of gravity. U.S. naval deployments, including carrier rotation and mine countermeasure capabilities, aim to secure maritime routes, while Iran leverages asymmetric tactics such as drone strikes and conditional access policies to disrupt commercial shipping. The targeting of energy infrastructure and tankers signals a deliberate expansion into economic warfare, increasing global market vulnerability and reinforcing the strategic significance of maritime security.

Geopolitically, the conflict is generating friction within the Western alliance and extending pressure into other theaters. Divergences between the United States and European allies, alongside coercive diplomatic signaling, indicate strains in coalition cohesion. Concurrent developments in the Indo-Pacific and the Russia-Ukraine war highlight the persistence of multi-theater competition. Defense procurement trends emphasize long-range strike capabilities, missile systems, unmanned platforms, and electronic warfare, underscoring a broader shift toward high-end, technology-driven conflict preparedness across major powers.

U.S. ATTACK ON IRAN - MIDDLE EAST DEPLOYMENT

The military confrontation between the United States, Israel, and Iran has entered an increasingly contested and high-risk phase, characterized by strategic bombing, tactical aircraft losses, and massive force deployments.

- **Downed U.S. Aircraft and CSAR Operations:** A U.S. Air Force F-15E Strike Eagle was downed over western Iran during a strike mission in contested airspace. U.S. Central Command initiated a high-risk Combat Search and Rescue (CSAR) operation involving special operations aviation and aerial refueling assets to recover the crew under the threat of Iranian air defenses. While Iran claimed responsibility for the downing, the U.S. has maintained its operational tempo.
- **Strategic Bombing and Air Power:** The U.S. continues sustained long-range strikes using B-1B and B-52H bombers from RAF Fairford, alongside B-2A stealth bombers operating from the U.S. mainland. The U.S. Air Force has also deployed 18 A-10C attack aircraft and advanced EA-37B electronic warfare platforms to the region to suppress increasingly adaptive Iranian air defenses.
- **Asset Losses in Saudi Arabia:** An Iranian drone attack on Prince Sultan Air Base in Saudi Arabia successfully destroyed a U.S. E-3G Sentry AWACS aircraft and a KC-135R tanker. The U.S. has since deployed a replacement E-3G via the United Kingdom.
- **Ground and Special Operations:** Elements of the 82nd Airborne Division have begun deploying to the Middle East. Additionally, Tier 1 special operations forces, including the 160th SOAR, have been positioned at various regional bases.
- **Iranian Wartime Measures:** Tehran has implemented wartime internal security measures, including capital punishment and asset seizure for individuals accused of providing intelligence to the U.S. or Israel. Over 1,000 arrests have been reported in recent weeks.

GLOBAL SECURITY & GEOPOLITICAL DYNAMICS

Naval Posture and Maritime Insecurity

The maritime domain remains a central leverage point, with strategic carrier rotations and escalating attacks on commercial infrastructure.

- **U.S. Aircraft Carrier Rotation:** The USS George H.W. Bush (CVN-77) has departed Norfolk to replace the USS Gerald R. Ford, which has been withdrawn for maintenance in Split, Croatia.
- **Amphibious Readiness:** The USS Tripoli and USS Boxer Amphibious Ready Groups, supported by Marine Expeditionary Units, remain in the CENTCOM area for potential ground contingencies. The 31st MEU recently conducted live-fire amphibious exercises at Diego Garcia.
- **Maritime Escalation:** An Iranian drone strike targeted a Kuwaiti-flagged oil tanker near Dubai, causing significant damage and marking an escalation into commercial maritime energy infrastructure.
- **Hormuz and Mine Warfare:** The U.S. Navy has deployed Independence-class Littoral Combat Ships (LCS) equipped with Mine Warfare Systems to secure the Strait of Hormuz. Iran continues to use the strait as a strategic tool, allowing only conditional passage for non-aligned states.

Diplomacy and Indirect Pressures

- **Coercive Diplomacy:** President Donald Trump has threatened to expand strikes to Iranian critical energy infrastructure, including power plants and oil exports, if a ceasefire is not reached.
- **Allied Friction:** Tensions have emerged between the U.S. and its European allies. Italy denied U.S. bombers permission to use Sigonella for Operation Epic Fury missions. Furthermore, Trump has threatened to stop weapon shipments to Ukraine to pressure European allies into joining a coalition to forcibly reopen the Strait of Hormuz.
- **Indo-Pacific:** China is conducting undersea mapping operations across the Pacific, Indian, and Arctic oceans to support submarine warfare. Japan has equipped the Aegis destroyer JS *Chokai* to fire Tomahawk cruise missiles.
- **Ukraine and Russia:** Russia has intensified strikes on Ukrainian rail logistics, while Ukraine continues drone strikes against Russian fuel depots and port infrastructure.

GLOBAL SECURITY AND DEFENSE PROCUREMENT AND CONTRACTS

Project / Procurement	Value / Quantity	Source Country / Company	Details
F135 Propulsion Systems	\$3.81 Billion	RTX (USA)	Contract modification for Lot 18 and 19 F-35 propulsion systems.
AIM-260 JATM Missiles	\$3.16 Billion / 450 Units	USA / Australia	Sale approved to extend allied air combat reach.
Autonomous Surface Vessels	\$1.75 Billion	Saronic Technologies (USA)	Funding to scale production and expand U.S. shipbuilding capacity.
Conventional Prompt Strike	\$1.356 Billion	Lockheed Martin (USA)	Modification for USS Zumwalt hypersonic strike integration.
Strategic Tanker Support	\$1.1 Billion	L3Harris / Canada	Two contracts for long-term sustainment of Canada's strategic tanker fleet.
T-38C Talon Support	\$900 Million	Boeing (USA)	Contract to sustain avionics for pilot training aircraft through 2036.
120mm Multi-Purpose Rounds	\$884.9 Million	Northrop Grumman (USA)	Contract for M1147 tank rounds for Abrams and allied forces.
F-35 Helmet-Mounted Displays	\$585 Million	Collins Elbit (USA)	Lot 18 and 19 hardware for U.S. and international partners.
Virginia-class Design Support	\$1.27 Billion	GD Electric Boat (USA)	Modification for continued engineering and design support.

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Conflict and energy consultancy

Project / Procurement	Value / Quantity	Source Country / Company	Details
SEWIP Block 3 Systems	\$334.4 Million / 9 Units	Northrop Grumman (USA)	Production of electronic attack systems, including a carrier- bound unit.
CH-47F Chinook Block II	\$326 Million / 6 Units	Boeing (USA)	Modernization and delivery of heavy-lift helicopters.
C-UAS Small Satellites	€248 Million / 20 Units	OHB Sweden	Development and manufacture of satellites for EUMETSAT.
Tridon Mk2 Anti- Aircraft	\$180 Million	BAE Systems (Sweden)	Delivery of truck-mounted 40mm anti-aircraft systems.
155mm M776 Cannon Tubes	\$146 Million	BAE Systems (USA)	Additional tubes for the M777A2 howitzer.
M30A2 GMLRS Rockets	\$83 Million / 270 Units	USA / Singapore	Sale of rockets to expand Singapore's HIMARS strike capability.
Joint Assault Bridge Systems	\$44.9 Million / 20 Units	Leonardo DRS (USA)	U.S. Army contract for the delivery of assault bridge systems.
Giraffe 1X Compact Radars	£24 Million	Saab UK	Order from the UK Ministry of Defence for compact radar systems.