

GLOBAL SECURITY AND DEFENSE DEVELOPMENTS DAILY

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Executive Assessment

U.S. military operations against Iran are intensifying through the combined use of strategic bombers, precision strike capabilities, and expanded regional force deployments. B-2 stealth bombers employing Massive Ordnance Penetrators against hardened IRGC underground facilities in Tehran indicate a deliberate focus on high-value, deeply buried targets, while accompanying strikes on air defense systems and infrastructure such as Kharg Island suggest a broader effort to degrade Iran's defensive network and economic nodes. The sustained flow of airlift, aerial refueling assets, and additional force elements, including F-35A deployments and the movement of a field artillery brigade, reflects preparations for prolonged and scalable operations across multiple domains.

Escalation dynamics are becoming more pronounced as U.S. leadership signals willingness to expand target sets to include critical national infrastructure, including transportation and energy systems. This shift toward strategic coercion is matched by Iranian warnings of proportional and regionally expansive retaliation, with an emphasis on both direct and proxy-based responses. Iranian missile and UAV activity against Israel remains controlled but persistent, reinforcing deterrence while avoiding immediate large-scale escalation. At the same time, Israeli operations continue to systematically degrade Iranian capabilities and disrupt reconstruction efforts, indicating a sustained attritional strategy.

The regional security environment is increasingly unstable, particularly across the Gulf, where attacks and sabotage targeting energy infrastructure have reduced processing capacity and heightened vulnerability. Maritime conditions remain contested, with electronic interference and increased naval presence contributing to disruptions in commercial shipping and routing decisions. These developments are driving continued volatility in global energy markets and prompting Gulf states to elevate military readiness, reinforce air defenses, and expand coordination with U.S. forces. International actors are calling for de escalation, but diplomatic engagement remains limited and indirect, with major powers emphasizing the risks to global trade and energy stability.

Defense industrial activity reflects parallel preparation for sustained high-intensity conflict, with significant U.S. investments in missile stockpiles, next-generation systems, and production capacity expansion. Procurement efforts spanning Tomahawk and SM-6 missiles, PAC-3 interceptors, and advanced guidance systems highlight an emphasis on rebuilding inventories under operational strain. Allied and partner developments, including European production expansion, Asian procurement programs, and advancements in autonomous naval and drone systems, indicate a broader trend toward rapid capability enhancement. Emerging technologies such as AI-enabled targeting, autonomous platforms, and next-generation interceptors are increasingly shaping the operational environment, reinforcing the multidomain character of the conflict.

U.S. ATTACK ON IRAN - MIDDLE EAST DEPLOYMENT

- The U.S. Air Force has begun conducting strike missions against Iran using bombers deployed to RAF Fairford in the United Kingdom. Two B-1B and three B-2A strategic bombers reportedly carried out strike missions and B-1Bs subsequently returned to RAF Fairford.
- U.S. B-2 Spirit stealth bombers struck an underground Islamic Revolutionary Guard Corps compound in Tehran with GBU-57 Massive Ordnance Penetrators during Operation Epic Fury, a campaign that also included the rescue of a downed American airman inside Iran..
- U.S. Air Force logistical airlift operations to the Middle East and the Gulf continue. C-17 and C-5 cargo aircraft are conducting regular flights to support regional deployments.
- Additional aerial refueling tanker aircraft have been deployed to multiple bases across the Middle East and Europe.
- The U.S. Army 142nd Field Artillery Brigade is heading to the Middle East.
- Two U.S. Air Force F-35A fighter jets have been deployed from the continental United States to RAF Lakenheath in the UK.
- The Israeli Air Force has released footage showing strikes targeting a 5P85TE2 TEL and a 64N6E2 radar from an S-300PMU2 air defense system in Tehran.
- The U.S. Air Force is reported to have carried out large-scale strikes targeting air defense systems on Kharg Island.

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- U.S. President Donald Trump intensified escalation rhetoric by stating that the United States could strike Iranian bridges and energy infrastructure as early as Tuesday if Tehran does not alter its current posture, explicitly expanding the potential target set beyond military facilities.
- In subsequent statements, Trump further escalated messaging by warning that continued Iranian resistance could result in the destruction of what he described as the foundations of Iran's "civilization," signaling a shift toward strategic coercion through threats against national infrastructure and economic systems.
- U.S. officials indicated that contingency planning is underway for expanded strike packages targeting transportation networks, energy production sites, and command infrastructure, reflecting preparation for a broader campaign scope.
- Iranian leadership condemned these statements, warning that any attacks on critical infrastructure would trigger proportionate and regionally widespread retaliation against U.S. forces, allied assets, and energy networks across the Middle East.
- Iranian military officials emphasized that escalation thresholds remain flexible and that response options include both direct strikes and indirect actions through regional networks, maintaining ambiguity in retaliation planning.
- Israeli leadership confirmed the continuation of sustained strike operations against Iranian military infrastructure, with targeting cycles focused on degrading long-term capability and preventing reconstruction of previously damaged facilities.
- Israeli operations also continued across secondary theaters, including Syria and Lebanon, targeting logistics corridors, weapons storage sites, and IRGC-affiliated infrastructure supporting regional force projection.
- Iranian missile and UAV activity against Israeli territory persisted at a controlled but continuous tempo, prioritizing deterrence signaling, air defense saturation testing, and operational persistence rather than immediate large-scale escalation.
- Energy infrastructure across the Gulf region experienced additional disruptions, with reports of strikes and sabotage affecting refinery operations and processing facilities in multiple states, increasing regional vulnerability.
- Several refineries and associated energy installations in Gulf countries were either damaged or temporarily shut down following attacks attributed to Iranian-linked actors, contributing to reduced processing capacity and heightened market uncertainty.

- Maritime security conditions in the Persian Gulf and surrounding waters remained highly unstable, with continued electronic interference, vessel tracking disruptions, and elevated naval presence by regional and external actors.
- Commercial shipping activity continued to adjust, with rerouting and delays driven by elevated threat perceptions and uncertainty regarding further attacks on energy and transport infrastructure.
- Global energy markets reacted sharply to the combined impact of infrastructure threats and actual disruptions, with oil prices showing continued volatility tied to escalation risks and supply concerns.
- Gulf states increased military readiness levels, reinforcing air defense systems, deploying additional security forces to protect critical infrastructure, and enhancing coordination with U.S. forces stationed in the region.
- European governments issued renewed calls for immediate de escalation, warning that sustained attacks on energy infrastructure could trigger broader economic consequences beyond the region.
- Russia and China reiterated opposition to further escalation, emphasizing the need for restraint while highlighting risks to global energy stability and international trade routes.
- Regional diplomatic channels remain active at a limited level, with intermediary states attempting to facilitate indirect communication despite continued public confrontation between Washington and Tehran.

GLOBAL DEFENSE DEVELOPMENTS

- The U.S. Army launches procurement of the XM30 infantry fighting vehicle with a \$547 million FY2027 budget request for 19 units.
- Newly released footage from Larissa in Greece provided one of the clearest public views yet of the aircraft widely believed in open-source defense reporting to be the RQ-180.
- The U.S. Navy seeks \$7.3 billion for 785 Tomahawks and 540 SM-6 missiles to rebuild fleet firepower and stocks.
- Huntington Ingalls Industries announced that its Newport News Shipbuilding division had redelivered USS New Jersey (SSN-796) to the U.S. Navy after completing post-shakedown availability.
- The U.S. Air Force has published a solicitation announcing its intent to award a sole-source contract to Boeing for the remanufacture of a critical guidance component inside the AGM-86B Air Launched Cruise Missile, keeping the nuclear-capable weapon operational for nearly another decade. The contract is structured as a seven-year Indefinite Delivery Indefinite Quantity agreement spanning one one-year ordering period and three two-year ordering periods, with a contemplated period of performance running from July 2026 through July 2033.
- The U.S. Department of War has awarded RTX Corporation a contract for the production and delivery of the 12th production lot of GBU-53/B StormBreaker guided bombs. The agreement has a maximum value of \$709 million and is scheduled for completion by February 2030.
- The U.S. Navy has requested a buy of 405 Patriot PAC-3 MSE interceptors to be utilized on U.S. Navy Guided Missile Destroyers.
- Lockheed Martin details NGI interceptor capabilities as next-generation system for U.S. missile defense architecture.
- 4iG and Northrop Grumman sign agreement for Hungary's first communications satellite under HUSAT programme.
- Next-generation YFQ-42A combat drone crashes in test flight, prompting investigation and flight pause.
- The Israeli Ministry of Defence has signed an approximately \$48-million contract with Elbit Systems for tens of thousands of locally produced 155mm artillery shells.

- Hanwha Aerospace has announced a €1.3 billion investment package to expand defence production capabilities in Romania.
- Japan's order for hundreds of U.S.-made Tomahawk cruise missiles is facing potential delays as American inventories are depleted by ongoing military operations in Iran. U.S. officials have indicated that deliveries scheduled through March 2028 could be disrupted.
- Kraken Robotics Inc. announces the successful integration and demonstration of its KATFISH towed synthetic aperture sonar and autonomous launch and recovery system (LARS) from SEFINE's RD-22 unmanned surface vessel (USV) in coordination with SEFINE SISAM (Strategic Unmanned Systems Research Center). The demonstration took place in Q1 2026 off the coast of Istanbul, Turkey.
- A newly identified Ukrainian sea drone fitted with a remotely operated machine-gun mount was spotted during a recent strike attempt on Russia's naval base at Novorossiysk.
- The Royal Navy has fielded Adventure, an autonomous minehunting system designed to detect and destroy naval mines remotely.
- South Korea is transferring a KF-21 Boramae prototype to Indonesia, accelerating negotiations for a 16-aircraft deal.
- Iranian forces are using AI-enhanced satellite imagery from Chinese firm MizarVision to refine targeting of U.S. military installations across the Middle East, according to U.S. defense intelligence.
- The Royal Thai Navy has awarded a contract to Spanish company Indra to procure a Lanza 3D long-range air surveillance radar to enhance defence of one of its key naval facilities.
- The US Department of Defense (DoD) has signed multiple framework agreements with four major defence contractors to increase production of missiles and their components. The agreements will invest in production facilities for Precision Strike Missiles (PrSM), Terminal High Altitude Air Defense (THAAD) seekers, Patriot Advanced Capability-3 (PAC-3) seekers, and other electronic components, according to multiple recent statements.

FORWARD LOOK – NEXT 7 DAYS

- Continued U.S. and Israeli air operations targeting Iranian military infrastructure, including command networks, logistics corridors, and dual-use facilities.
- Increased integration of electronic warfare capabilities, particularly EA-37B platforms, to suppress Iranian air defenses and enable follow-on strike packages.
- Expansion of U.S. naval presence in the Gulf, including carrier strike group deployment and mine warfare operations aimed at securing the Strait of Hormuz.
- Sustained volatility in maritime traffic, with further rerouting or delays of commercial vessels depending on threat perceptions and security incidents.
- Continued elevation of military readiness levels among Gulf states, including enhanced air defense deployments and naval patrol operations.
- Ongoing diplomatic signaling and indirect mediation efforts, with limited prospects for immediate de-escalation despite conditional messaging from both sides.
- Additional defense procurement and industrial announcements reflecting increased demand for air defense, strike systems, and autonomous capabilities.