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Folder: IRAN-IRAQ WAR (05/31/1984)

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WITHDRAWAL SHEET

Ronald Reagan Library

Collection Name EXECUTIVE SECRETARIAT, NSC: COUNTRY FILE

Withdrawer

LOJ 9/29/2006

File Folder IRAN-IRAQ WAR (5/31/84)

FOIA

F1718

Box Number 36

BATTLE

45

ID	Doc Type	Document Description	No of Pages	Doc Date	Restrictions
28189	MEMO	FORTIER/TEICHER TO ROBERT MCFARLANE, RE IRAN AND IRAQ (3 PAGE 2S)	4	5/31/1984	B1
28191	MEMO	PHILIP DUR TO JOHN POINDEXTER, RE ESSENTIAL ELEMENT...	1	5/31/1984	B1
28192	OUTLINE	RE ESSENTIAL ELEMENTS...	1	ND	B1
28193	MEMO	DUR TO POINDEXTER, RE CONCEPT PAPER: CONTINGENCY PLANNING...	1	5/31/1984	B1
28194	PAPER	CONTINGENCY PLANNING... (HEAVILY NOTATED)	6	ND	B1
28195	OUTLINE	SCENARIOS	1	ND	B1

Freedom of Information Act - [5 U.S.C. 552(b)]

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ID	Doc Type	Document Description	No of Pages	Doc Date	Restrictions
28196	PAPER	CONTINGENCY PLANNING... (SAME AS 28194 WITHOUT NOTATIONS)	6	ND	B1
28197	BRIEFING BOOK	RE IRAN-IRAQ	39	5/31/1984	B1
28198	MEMO	RICHARD BEAL TO MCFARLANE, RE THREAT SITUATION SUMMARY R 1/8/2008 NLRRF1718	1	5/31/1984	B1
28199	SUMMARY	IRAN-IRAQ SITUATION (WITH ATTACHMENTS)	9	5/31/1984	B1

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205
9/29/06

NSC/S PROFILE

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ID 8404088

RECEIVED 21 MAY 84 17

TO MCFARLANE

FROM MARTIN

DOC DATE 31 MAY 84 /

ROBINSON

31 MAY 84

KEYWORDS: PERSIAN GULF

OIL VULNERABILITY

SUBJECT: IMPACT OF 3 MONTH DISRUPTION OF PERSIAN GULF OIL

ACTION: FOR INFORMATION

DUE: 23 MAY 84 STATUS IX FILES PA

FOR ACTION

FOR CONCURRENCE

FOR INFO

MCFARLANE

COMMENTS

REF#

LOG

NSCIFID

(DW)

ACTION OFFICER (S) ASSIGNED

ACTION REQUIRED

DUE

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C MAY 22 1984

Mcfarlane noted

WM, RO

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National Security Council
The White House

1172

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Package #

4088

04 MAY 21 P 3: 25

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Dep. Exec. Sec'y	1	✓	
Bob Kimmitt	2	K	
John Poindexter	3		
Tom Shull			
Wilma Hall			
Bud McFarlane	4	M	I
Bob Kimmitt			
NSC Secretariat	5		N
Situation Room			

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cc: VP Meese Baker Deaver Other _____

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(Date/Time)

~~SECRET~~

4088

3

MEMORANDUM

NATIONAL SECURITY COUNCIL

~~SECRET~~

May 21, 1984

INFORMATION

MEMORANDUM FOR ROBERT C. McFARLANE

FROM: WILLIAM F. MARTIN ^{WFM}
ROGER W. ROBINSON ^{RWR}

Thank you
RCM HAS SEEN

SUBJECT: Impact of 3 Month Disruption of Persian Gulf Oil

Summary. At the request of John Poindexter, we are providing this brief analysis of the impact of an uncontested 3 month disruption of Persian Gulf oil supplies. Although the Arab oil exporters of the Persian Gulf have the financial capability to withstand a complete halt of oil exports for 3 months or more, such an event could plunge the world economy back into recession. Expectations play a central role in determining the oil market response to a disruption. At the outset of a major supply interruption in the Persian Gulf, the market will not know how long access to Arab oil will be restricted, especially in the absence of any Western response to restore oil flows. The uncertainty generated by such a situation would leave us in an indefensible position. Our strategy for relying on cooperation among our allies to promote market calm, primarily through the release of stocks, would probably collapse.

Past Experience. The situation after the Iranian Revolution in 1979 provides the best example of the central role played by perceptions. Iranian crude oil exports were halted for 3 months. Oil companies drew down inventories to meet winter demand, reducing stocks to near minimum acceptable levels. Uncertainty over future suppliers and fear of a spreading Islamic revival subsequently caused a massive increase in demand for precautionary inventories. As a result, prices rose from less than \$13 per barrel in 1978 to a peak of nearly \$35 by 1981.

Current Situation. Under current circumstances, there is insufficient excess productive capacity available outside the Persian Gulf to offset a complete loss of oil exports from the region. Although the release of oil stocks, including the U.S. Strategic Petroleum Reserve, will help restrain price increases, the uncertainty inherent in the market will serve to drive prices upward even in the absence of any physical shortage. Only if we are able to demonstrate that the interruption will be short-lived can we expect to be able to restrain price increases.

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Authority F96-120/3 #4478 CAS 2/16/01
BY LBJ NARA DATE 9/29/06

Lack of a firm Western response would serve to reinforce notions of uncertainty. Oil prices could triple, triggering a major recession and a new round of inflation. The international debt crisis, already a major problem, would significantly worsen. For every \$1 increase in oil prices, the oil import bill of the 10 largest debtor developing countries increases \$750 million. Increasing oil prices, combined with rising interest rates, could lend impetus to calls for a politicized debtor cartel like the one recently advocated by Argentina's President Alfonsin.

Furthermore, if a three month disruption were resolved and the flow of oil restored without a clear removal of the Iranian threat, the oil market would probably react on the expectation of future disruptions. An anticipatory inventory build would result, driving prices upward even further. Government statements urging calm would lose credibility.

Conclusions. Our effectiveness in handling the market reaction to a disruption will in large measure depend on our ability to demonstrate that the interruption will be of limited duration and that it will not be repeated. In the absence of such perceptions, companies will respond by building inventories. Furthermore, our allies -- especially Japan -- will be unwilling to continue to cooperate with us internationally if they believe it will endanger their vital interests. Failure to permanently remove the threat of a disruption after Iran has demonstrated a willingness and capability to stop Persian Gulf oil flows will leave us in an untenable position and further undermine our credibility in the Middle East.

cc: Don Fortier
Richard Beal
Geoff Kemp
Howard Teicher
Dave Wigg
Ben Bonk

UNCLASSIFIED UPON REMOVAL
OF CLASSIFIED ENCLOSURE(S) *707 9/29/00*

5

SYSTEM II PROFILE

~~SECRET/SENSITIVE~~

ID 8490647

RECEIVED 13 JUN 84 18

TO MCFARLANE

FROM FORTIER

DOCDATE 31 MAY 84

TEICHER

31 MAY 84

KEYWORDS: IRAN

IRAQ

SAUDI ARABIA

SUBJECT: SIGNALLING IRAN & IRAQ

ACTION: FOR DECISION

DUE:

STATUS C

FILES SII

FOR ACTION

FOR CONCURRENCE

FOR INFO

MCFARLANE

COMMENTS

REF#

LOG

NSCIFID

(B / B)

ACTION OFFICER (S)

ASSIGNED

ACTION REQUIRED

DUE

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	<i>JUN 13 1984</i>	<i>Mcfarlane approved</i>		<i>DP HT</i>

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National Security Council
The White House

1194 JLF

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Package # 90647

7

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Dep. Exec. Sec'y	<u>1</u>	<u>✓</u>	
Bob Kimmitt			
John Poindexter	<u>2</u>	<u>[Signature]</u>	
Tom Shull			
Wilma Hall			
Bud McFarlane	<u>5</u>		<u>A</u>
Bob Kimmitt	<u>4</u>		
NSC Secretariat			
Situation Room	<u>3</u>		<u>DACOM</u>

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(Date/Time)

This is worth a try.
[Signature]

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90649
8

CLASSIFICATION

CIRCLE ONE BELOW

MODE

PAGES 3

IMMEDIATE

84 MAY 4

P 7: SECURE FAX # 52

RELEASER _____

PRIORITY

NON-SECURE FAX # _____

DTG 042103Z JUN 84

ROUTINE

ALL INFORMATION CONTAINED
HEREIN IS UNCLASSIFIED
DATE 11/29/06 BY 785

TTY # _____

FROM/LOCATION/

1. White House Situation Room

TO/LOCATION/TIME OF RECEIPT

1. Robert Kimmitt for Mr. McFarlane / LONDON

/ TOR: 042241Z
JUN 84

2. Robert Kimmitt / SITTO #91 /

3. _____

4. _____

INFORMATION ADDRESSEES/LOCATION/TIME OF RECEIPT

2. _____

SPECIAL INSTRUCTIONS/REMARKS: ATTACHED:

SIGNALLING IRAN AND IRAQ

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OF CLASSIFIED ENCLOSURE(S)

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CLASSIFICATION

785
9/29/06

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ID 8490654

RECEIVED 01 JUN 84 12

TO POINDEXTER FROM DUR
DUR

DOCDATE 31 MAY 84 **B**
31 MAY 84

KEYWORDS: IRAN IRAQ
MILITARY POSTURE PERSIAN GULF

SUBJECT: CONCEPT PAPER CONTINGENCY PLANNING ESCALATION IN IRAN - IRAQ WAR

ACTION: FOR INFORMATION DUE: STATUS IX **FILES SII**

FOR ACTION FOR CONCURRENCE FOR INFO
POINDEXTER

COMMENTS

REF# LOG NSCIFID (K *K*)

ACTION OFFICER (S)	ASSIGNED	ACTION REQUIRED	DUE	COPIES TO
<i>Poin Dexter</i>	<i>5/31</i>	<i>a/o for information</i>		
	<i>20/4</i>	<i>Poin Dexter Noted</i>		

DISPATCH _____ W/ATTCH FILE _____ (C)

National Security Council
The White House

1193 GTF

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Package # 90654 follow on

MAY 31 P 7: 51

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Dep. Exec. Sec'y	<u>1</u>	<u>J.</u>	<u>14</u>
Bob Kimmitt			
John Poindexter	<u>2</u>	<u>J</u>	
Tom Shull			
Wilma Hall			
Bud McFarlane			
Bob Kimmitt			
NSC Secretariat	<u>4</u>	<u>B</u>	<u>N</u>
Situation Room	<u>3</u>	<u>Pat</u>	<u>I</u>

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28191	MEMO PHILIP DUR TO JOHN POINDEXTER, RE ESSENTIAL ELEMENT...	1	5/31/1984	B1

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28192	OUTLINE RE ESSENTIAL ELEMENTS...	1	ND	B1

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The White House

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Package #

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04 MAY 31 P 7: 51

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Dep. Exec. Sec'y	1	<i>[Signature]</i>	
Bob Kimmitt			
John Poindexter	2	<i>[Signature]</i>	
Tom Shull			
Wilma Hall			
Bud McFarlane			
Bob Kimmitt			
NSC Secretariat	3	<i>B</i>	<i>N</i>
Situation Room			

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TAB

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~~TOP SECRET~~

71

MEMORANDUM

NATIONAL SECURITY COUNCIL

~~TOP SECRET UMBRA ORCON~~

INFORMATION

May 31, 1984

MEMORANDUM FOR ROBERT C. MCFARLANE

FROM: RICHARD S. BEAL *RSB*

SUBJECT: Threat Situation Summary for Iran-Iraq
May 31, 1984

The attached threat situation summary describes the status of our current crisis planning activities for Iran-Iraq.

Attachment

Tab I - Threat Situation Summary

~~TOP SECRET UMBRA ORCON~~
Declassify on: OADR

~~TOP SECRET~~

DECLASSIFIED

NLRR F1718 #28198

BY CU NARA DATE 1/8/08

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- B-6 Release would constitute a clearly unwarranted invasion of personal privacy [(b)(6) of the FOIA]**
- B-7 Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]**
- B-8 Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]**
- B-9 Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]**

C. Closed in accordance with restrictions contained in donor's deed of gift.