



Strategic Assessment of US-Israel War On Iran

Policy Brief



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CISS Strategic Assessment of U.S.-Israel War on Iran

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The Center for International Strategic Studies (CISS) Islamabad conducts original policy research, analyses, and strategic outreach, and aims to highlight evolving regional and global strategic issues to promote peace and stability. This policy brief assesses the post-war Middle Eastern strategic order.

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EXECUTIVE SUMMARY

This policy brief analyzes the pre-war drivers, key strategic aspirations of the actors involved, and post-war trajectories of the 2026 U.S.-Israel-Iran war. The scope of the war has engulfed the entire region and would shape new regional realities after the end of hostilities. The complex nature of regional dynamics means the future order would be shaped by enduring structural drivers and a limited number of high-impact uncertainties. The future of Middle Eastern geostrategic order after the end of the war would not converge towards a single, strategic equilibrium.

The war was not triggered by a single incident but resulted from a convergence of several factors: collapse of nuclear diplomacy, intensifying regional rivalries, and the normalization of force as statecraft. The Strait of Hormuz emerged as a central economic and geopolitical flashpoint, while Israel's regional military posture and Washington's regime-change ambitions further escalated tensions. The issue of Iran's nuclear programme underlay the U.S.-Iran tensions.

Post-war dynamics are defined by fundamentally incompatible objectives. The U.S. and Israel seek the dismantlement of Iran's nuclear and missile capabilities, while Iran prioritize regime survival, strategic deterrence and sanctions relief. Gulf states demand stability and energy flows. In all this, Pakistan has emerged as a key mediator seeking peace and regional stability.

The future regional order will be driven by three structural variables: Iran's nuclear decision (restraint vs. weaponization), the strategic status of the Strait of Hormuz, and evolving Middle East dynamics. These drivers produce multiple plausible scenarios ranging from managed stability to a fragmented arms race, with varying levels of cooperation or discord.

Overall, the region is entering a phase of “competitive fragmentation,” characterized by persistent instability, technological militarization, and weakened international norms. A durable settlement remains contingent on a negotiated nuclear framework, stabilization of maritime security in Hormuz, and sustained multilateral diplomacy – within which Pakistan’s mediatory role remains a critical enabling factor.



**THE ISSUE OF IRAN’S NUCLEAR
PROGRAMME UNDERLAY THE U.S.-IRAN
TENSIONS**



PRE-WAR STRATEGIC ASSESSMENT

The outbreak of war in the Middle East emerged as a result of cascading events spanning over last few decades. It was not triggered by a single factor but there were multitude of drivers behind the start of hostilities. These factors were: the collapse of nuclear diplomacy, intensifying regional rivalries, and increasing normalization of force as a form of statecraft. From war in Gaza to attack on Iran's nuclear facilities in June 2025, the region entered a sustained escalation cycle in which deterrence threshold weakened and military actions increasingly replaced negotiation as a mode of conflict management.

The primary driver of war has been the collapse of nuclear diplomacy between the U.S. and Iran. Although, both states signed the Joint Comprehensive Plan of Action (JCPOA) in 2015, the U.S. unilaterally withdrew from the agreement in 2018.[1] Recently, during the second term of Trump's presidency negotiations between the U.S. and Iran were unable to reach a consensus on the enrichment limits.

Iran maintained that its program was for peaceful purposes with President Masoud Pezeshkian reiterating that Tehran has "no intention to use its nuclear capabilities for military purposes." [2] Moreover, the International Atomic Energy Agency (IAEA) and the U.S. Intelligence Agency Chief Tulsi Gabbard have also endorsed Tehran's position on nuclear enrichment.[3] Despite the assurances, policymakers in Washington and Tel Aviv constantly emphasized that Iran is developing a nuclear bomb and has to be stopped at all costs.[4]

The situation further deteriorated when the U.S. and Israel jointly conducted military strikes on Iran's Nuclear facilities in June 2025, an event later dubbed as "12 Days War." [5] After the strikes, both states engaged in diplomatic talks regarding the Highly Enriched Uranium (HEU) of Iran and the future of Iran's nuclear program. However, during the talks, the U.S. and Israel attacked Iran starting the war.

Another major trigger for the war was the consistent aspiration of the U.S. and Israel for a regime change in Tehran. This aspiration played an important role in the decades-long rivalry between the U.S.-Israel and Iran. The U.S. sought to strengthen its position in the region by maintaining strong defence cooperation with Gulf countries and establishing military bases across the region.[6]

At the same time, Israel had been the closest ally of the U.S. and yielded great influence over foreign policy decision making in Washington. Similarly, Iran was put under heavy economic sanctions with an attempt to make it a pariah state.[7] Iran, at the same time, to counter the threats, strengthened a network of proxies throughout the region including Hezbollah in Lebanon, and Houthis in Yemen.

Israel had been excessively using force in Gaza since October 2023 in clear violation of all international and human rights laws. The muted response of the international community over the Israeli genocide in Gaza emboldened Tel Aviv to carry out attacks across the region in Lebanon, Syria and Iran. Israel has been continuously attacking Lebanon and Southern Syria over the past few years.

Moreover, the weakening of Iran's deterrence threshold and the increasing use of force by Israel in the region also played an important role in the outbreak of war. Israel had been excessively using force in Gaza since October 2023 in clear violation of all international and human rights laws.

The muted response of the international community over the Israeli genocide in Gaza emboldened Tel Aviv to carry out attacks across the region in Lebanon, Syria and Iran. Israel has been continuously attacking Lebanon and Southern Syria over the past few years.

At one moment, Israel carried out attacks against Iran's embassy in Damascus that resulted in the first direct Iranian response in the form of Operation True Promise 1.[8] Similarly, Israel's continuous aggressive attacks across the region led to small crisis episodes between Tel Aviv and Tehran before the breakout of full-fledged war on 28 Feb 2026.



POST-WAR ASPIRATIONS OF KEY ACTORS

FOLLOWING SIX WEEKS OF THE U.S.-IRAN WAR, EACH PRINCIPAL ACTOR IS SIMULTANEOUSLY PROSECUTING A WARTIME STRATEGY AND ARTICULATING A DISTINCT VISION OF AN ACCEPTABLE POST-WAR ORDER. THIS SECTION MAPS THE WARTIME STRATEGIES AND POST-WAR END-STATE OBJECTIVES OF FIVE KEY ACTORS: THE UNITED STATES, ISRAEL, THE ISLAMIC REPUBLIC OF IRAN, THE GULF COOPERATION COUNCIL (GCC) STATES, AND PAKISTAN, WHOSE EMERGENCE AS A PRIMARY MEDIATOR HAS BECOME A DEFINING FEATURE OF THE DIPLOMATIC PHASE. UNDERSTANDING THESE DIVERGENT AND IN SEVERAL CASES, MUTUALLY INCOMPATIBLE END-STATES IS ESSENTIAL FOR ANTICIPATING WHETHER A DURABLE POST-WAR ORDER IS ACHIEVABLE IN THE NEAR TERM.

UNITED STATES

Dimension	Assessment
Security	Permanent and complete end to uranium enrichment, as well as the full dismantlement of Iran’s key enrichment facilities, many of which had already sustained damage during the conflict, in addition to the surrender of Iran’s existing stockpile of enriched uranium. ¹¹ Suspension of Iran’s ballistic missile programme; ¹² freedom of navigation and shared control of the Strait of Hormuz; ¹³ removal of Iranian-backed proxy networks across Iraq, Syria, Lebanon, and Yemen. ¹⁴
Economic & Energy	Stabilize global oil markets and reverse domestic fuel price surge; leverage post-war reconstruction contracts; reassert dollar dominance in Gulf energy trade. The naval blockade is designed to flip Hormuz’s leverage by denying Tehran the economic benefits of selective transit control. ¹⁵
Territorial & Political	Facilitate a governing transition in Tehran willing to engage diplomatically; ¹⁶ limit Chinese and Russian strategic gains in a post-war Iran; ¹⁷ and extract a durable regional security architecture with Gulf allies.

ISRAEL

Dimension	Assessment
Security	Permanent neutralization of Iran’s nuclear programme and long-range missile capability; full degradation of Hezbollah’s military capacity via the ongoing Lebanon ground operation, explicitly excluded from the ceasefire by Israel. ¹⁶ Planned creation of a permanent security zone up to the Litani River in Lebanon. ¹⁷
Economic & Energy	Post-war normalization dividends with additional Gulf states; reduced shipping and insurance costs in the Red Sea and Eastern Mediterranean; access to Gulf sovereign wealth reconstruction financing.
Territorial & Political	A Lebanon where Hezbollah is fully disarmed, pursued via direct talks with the Lebanese government (first since 1983) while simultaneously striking Hezbollah and refusing any ceasefire with the group; ¹⁸ consolidation of the Abraham Accords, potentially including Saudi Arabia; ¹⁹ a fragmented Iranian state incapable of funding proxies for a generation. ²⁰

IRAN

Dimension	Assessment
Security	Preservation of Iran’s governing system and IRGC institutional primacy; retention of a deterrent missile and drone force; reconstruction of air defense networks destroyed in the war. ²³ The right to a civilian nuclear programme, not full weapons capability, is Iran’s principled position.
Economic & Energy	Sanctions relief; war reparations; restoration of oil export capacity; Hormuz control as a bargaining chip. Iran has demanded \$6 billion in frozen asset releases and the right to charge Hormuz transit tolls. ²⁴
Territorial & Political	Maintain ideological leadership of the Axis of Resistance, the Iran-led network of allied state and non-state actors across Lebanon, Iraq, Syria, Gaza, and Yemen opposed to U.S. and Israeli regional influence; preserve IRGC influence in Iraq and Syria; resist any settlement that dismantles its nuclear programme or legitimizes the U.S.-Israeli campaign. Lebanon ceasefire coverage is also a non-negotiable demand. ²⁵

GCC STATES

Dimension	Assessment
Security	Permanent end to Iranian missile and drone attacks on Gulf infrastructure; a regional security framework not requiring full military alignment with the US. ²⁴ Kuwait, Bahrain, Qatar, UAE, and Saudi Arabia have all sustained direct Iranian strikes. A Bahrain-sponsored UNSC resolution authorizing maritime Hormuz protection, backed by all six GCC states, was vetoed by Russia and China. ²⁵
Economic & Energy	Unconditional reopening of the Strait of Hormuz, the GCC's existential economic priority. ²⁶ 230+ oil tankers stranded inside the Gulf; Brent above \$100/barrel; ²⁷ Qatar Energy force majeure on all LNG exports; 70% of Gulf food imports disrupted. ²⁸ Saudi Arabia is diverting oil via the East-West pipeline to Yanbu; the UAE via the Abu Dhabi pipeline to Fujairah, both partial and vulnerable alternatives. Qatar's LNG has no alternative route. ²⁹
Territorial & Political	A weakened but governable Iran, state collapse on the Gulf's doorstep is feared more than Iranian aggression. Saudi Arabia is potentially leveraging a post-war moment to finalize normalization with Israel under a formal US security guarantee. ³⁰ The GCC-wide concern is that any deal conceding Iranian Hormuz control would be a strategic defeat regardless of military outcomes. ³¹

PAKISTAN

Dimension	Assessment
Security	Preservation of its mediator role without military entanglement; ³² maintenance of bilateral relationships with both Iran (shared border, functional ties) and Saudi Arabia (SMDA partner); ³³ avoidance of commitments that compromise its India-focused deterrence posture.
Economic & Energy	Continued access to Gulf remittance flows (2.6 million Pakistani workers in Saudi Arabia); protection of energy import routes through Hormuz; post-war economic dividends from its elevated diplomatic profile.
Territorial & Political	Consolidation of Pakistan's emergence as an indispensable regional broker; strengthening of SMDA credibility through active crisis management; demonstration of strategic autonomy as a non-Western mediator acceptable to both Washington and Tehran. ³⁴

THE FUNDAMENTAL DEADLOCK

The sources indicate that these aspirations currently create two insurmountable “fault lines:”

- The U.S.-Israel Gap: The U.S. desire for a negotiated exit is undermined by Israel’s refusal to halt operations in Lebanon, which is the exact issue Iran considers a deal-breaker.[35]
- The Nuclear Binary: Washington demands an affirmative commitment from Iran to never seek nuclear weapons, which Tehran considers an unacceptable surrender of sovereign rights.[36]

Until these conflicting post-war visions are reconciled, particularly regarding the Lebanon Theater and the Strait of Hormuz, the war is likely to remain at a dangerous inflection point. The 2026 Iran war is at its most dangerous inflection point since hostilities began on 28 February.

The Islamabad Talks demonstrated that direct negotiation is possible and partial progress achievable, but the nuclear issue, the Lebanon theatre, control over the Strait of Hormuz Iranian mistrust of U.S. commitments remained insurmountable in a single round.

A durable settlement requires U.S. pressure on Israel to halt Lebanon operations, a verifiable nuclear framework that stops short of full dismantlement, and sanctions relief sufficient to give Tehran a political rationale for compromise. Pakistan’s role as the trusted channel between Washington and Tehran is now the most important diplomatic asset in the region. Its preservation and utilization is the immediate priority for all parties seeking an exit.

“ PAKISTAN’S ROLE AS THE TRUSTED CHANNEL BETWEEN WASHINGTON AND TEHRAN IS NOW THE MOST IMPORTANT DIPLOMATIC ASSET IN THE REGION ”

STRUCTURAL DRIVERS OF THE POST-WAR MIDDLE EASTERN ORDER

THE TRAJECTORY OF THE POST-WAR MIDDLE EASTERN ORDER WILL BE DETERMINED BY A SET OF STRUCTURAL DRIVERS THAT ARE SHAPING BEHAVIOUR, STRATEGIC CHOICES, AND SYSTEMIC CONSTRAINTS OF ALL THE ACTORS INVOLVED. THIS ASSESSMENT IDENTIFIES THREE SUCH DRIVERS AS DECISIVE: THE FUTURE OF IRAN'S NUCLEAR AND MISSILE PROGRAMME, THE EVOLVING STATUS OF THE STRAIT OF HORMUZ, AND THE ROLE OF MAJOR POWERS IN THE REGIONAL SECURITY ARCHITECTURE. THE INTERACTION BETWEEN THESE THREE VARIABLES WOULD DEFINE THE BOUNDARIES WITHIN WHICH ALL PLAUSIBLE POST-WAR SCENARIOS UNFOLD.

FUTURE TRAJECTORY OF IRAN'S NUCLEAR AND MISSILE PROGRAMME

The major structural driver of the post-war Middle Eastern order would be the decision of Iran regarding its nuclear programme and also its broader strategic programme. This variable would directly impact the future trajectory of regional security architecture as it has been the major root cause of the ongoing war. There are multiple decisions that Iran can make regarding its nuclear weapons programme which can either lead to nuclear restraint under International oversight or moves towards weaponization, either overtly or through a latent breakout capability.

In a restraint scenario, Iran may agree to limit enrichment levels, except a moratorium on enrichment, accept intrusive monitoring mechanisms under the IAEA, and re-engage in a sanctions relief framework. The degradation of key nuclear facilities during the conflict could reinforce such a decision by raising the material and technical costs of rapid weaponization.

Under these conditions, Iran would prioritize economic recovery, restoration of oil exports, and reintegration into global financial systems. This pathway would reduce immediate proliferation pressures in the region, particularly among Gulf states, and reopen the possibility of a negotiated nuclear arrangement, albeit under stricter verification regimes than previous agreements.

However, multiple structural and political factors may push Tehran in the opposite direction. The military targeting of its nuclear infrastructure, coupled with sustained external pressure, may reinforce the perception within Iranian strategic circles that nuclear capability is the only credible guarantee of national survival. In this context, withdrawal from the Nuclear Non-Proliferation Treaty (NPT) would represent a decisive escalation, removing legal constraints on enrichment and inspection, and significantly reducing transparency regarding Iran's nuclear activities.

Also because of a transition in Iran’s leadership with the election of a new Supreme Leader this could significantly influence the strategic decision-making of Tehran. A major hindrance to Iran’s pursuit of a weapon programme was a religious fatwa given by the previous Supreme Leader, Syed Ayatollah Khamenei,[37] which if not reiterated by the new supreme leader can signal a potential shift in preference. Such a move would likely trigger a rapid deterioration in regional security, intensify Israeli and U.S. pre-emptive postures, and increase the probability of a horizontal proliferation cascade, particularly involving Saudi Arabia and potentially other regional actors. [38]

The future of Iran’s stockpile of Highly Enriched Uranium (HEU) remains a critical variable within this driver. Retention of HEU would provide Tehran with latent nuclear capability, enabling rapid breakout if strategic conditions demand it. Conversely, any agreement requiring the removal or dilution of HEU stockpiles would serve as a key measure regarding a restraint policy.

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**THE FUTURE OF IRAN’S STOCKPILE OF HEU REMAINS
A CRITICAL VARIABLE WITHIN THIS DRIVER**
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Parallel to its nuclear trajectory, Iran's missile and drone programmes are expected to expand irrespective of nuclear outcomes. The war has demonstrated the operational utility of these capabilities, reinforcing their role as central components of Iran's deterrence architecture. Even under a nuclear restraint scenario, Tehran is likely to compensate by enhancing its missile capabilities, accuracy, and survivability, alongside scaling its drone capabilities for asymmetric warfare applications. At the same time, Gulf countries would also increase their investment not only in anti-missile and anti-drone defense systems but would also likely develop such long-range precision weapons themselves.

Taken together, the future of Iran's nuclear and strategic programme does not present a binary outcome but a spectrum ranging from constrained compliance to accelerated weaponization. Each pathway carries distinct implications for regional stability, proliferation risks, and great power involvement. As such, this driver remains the most consequential variable shaping the boundaries within which the post-war Middle Eastern order will evolve.

THE FUTURE OF THE STRAIT OF HORMUZ

This conflict has fundamentally altered the strategic and legal character of the Strait of Hormuz, transforming it from a globally regulated maritime chokepoint into a contested arena. Known as world's most vital energy corridor, the Strait has carried nearly 20 percent of global oil and LNG supplies,[39] and has emerged as the most important leverage point for Iran.

In this context, the post-war trajectory of the Strait can be understood through three plausible scenarios, each shaped by the interplay of military capacity, political resolve, and international coordination.

Iran's parliament is advancing legislation to formalize sovereignty claims and institutionalize toll collection, while the IRGC has implemented a system requiring vessels to submit manifests and crew details through approved channels, with transit fees reportedly reaching \$2 million per ship, payable in yuan or bitcoin.[40]

Maritime traffic has declined by approximately 90 percent, leaving nearly 2,000 vessels stranded. [41] The cost of crude and Brent oil has increased significantly, showcasing the importance of the strait for the U.S.

STRAIT OF HORMUZ



BEFORE THE WAR

DURING THE WAR

SCENARIO A: CONTESTED DETERRENCE

The most probable near-term outcome is a condition of contested deterrence, in which neither Iran nor external powers achieve decisive control. Under this scenario, the U.S. and its partners succeed in partially reopening the Strait through sustained naval presence and limited military operations, but fail to eliminate Iran's asymmetric denial capabilities, including mines, drones, and coastal missile systems, which remain dispersed and difficult to target comprehensively. Iran retains sufficient leverage to selectively control access and threaten disruption, ensuring the Strait remains neither fully closed nor fully secure.

The result will be a new equilibrium characterized by intermittent disruptions, elevated insurance premiums, and fragmented transit arrangements, where access is determined by political proximity rather than international law. This condition does not resolve the underlying crisis; it institutionalizes instability, allowing Iran to preserve the Strait as a long-term strategic bargaining tool in broader negotiations over sanctions, nuclear policy, and regional influence.

From the perspective of smaller states and developing economies, particularly those in Asia and South Asia that depend on Gulf energy, this outcome imposes disproportionate economic costs without offering a corresponding voice in the governance of the waterway. Any durable solution must therefore incorporate the legitimate interests and representation of these affected states.

SCENARIO B: IRANIAN DOMINANT CONTROL

Another plausible scenario is Iran's sustained control, in which Tehran successfully consolidates its wartime gains into permanent governance over the Strait. Iran formalizes its parliamentary legislation, enforces a sustained toll system, and normalizes selective transit through mechanisms such as vessel vetting and exclusion lists.

Such an outcome would represent a historic shift in the global maritime order, effectively undermining the transit passage regime established under international law^[42] and setting a precedent for similar assertions in other strategic waterways.

The implications extend well beyond the immediate parties to the conflict. Energy markets would face structurally higher costs, global supply chains would fragment along political rather than commercial lines, and the credibility of externally imposed maritime security architectures would be significantly weakened.

Moreover, the economic benefits derived from toll revenues would strengthen the IRGC's institutional role, while reducing Iran's domestic incentives for diplomatic compromise on nuclear and regional issues.

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STRAIT HAS CARRIED NEARLY 20 PERCENT OF GLOBAL OIL AND LNG SUPPLIES AND HAS EMERGED AS THE MOST IMPORTANT LEVERAGE POINT FOR IRAN

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SCENARIO C: INTERNATIONALISATION OF THE STRAIT

The most desirable, and at present least probable, outcome is the internationalisation of the Strait, whereby a negotiated governance framework restores freedom of navigation under multilateral or institutional oversight. This scenario would require sustained diplomatic convergence among major powers, active Chinese participation in mediation, and sufficient political flexibility within Iran to accept a framework that provides it legitimate recognition without coercive authority.

Under such an arrangement, the Strait would operate under internationally recognized rules, potentially granting Iran a limited and clearly defined role in coastal management, while eliminating unilateral control mechanisms incompatible with international law.

The benefits of this outcome would be systemic, i.e., the restoration of stable energy flows, the reinforcement of the transit passage as a foundation of maritime order, and the reduction of escalation risks in one of the world's most volatile regions. This scenario also offers the greatest benefit to energy-dependent developing economies, which stand to lose most under continued instability.

Given the alignment of incentives required to achieve it, sustained and principled multilateral diplomacy, rooted in the U.N. Charter and the principle of sovereign equality, remains the most effective instrument.

Dimension	A: Contested Det.	B: Iranian Control	C: Internationalised
Danger Level	High	Critical	Low
Hormuz Status	Partial, elevated risk	Toll regime codified	Free passage restored
Energy Cost	+15–25% premium	+30–40% structural	Returns to pre-war
Developing Economy Impact	High — disproportionate burden	Severe — structural harm	Significantly alleviated
Nuclear Risk	Iran hedges continue	Breakout incentive rises	Deal pathway opens
Legal Impact	Norms weakened	UNCLOS transit nullified	Norms reinforced

Collectively, these scenarios suggest that the post-war status of the Strait of Hormuz may not revert to its pre-conflict normalcy. Instead, it will remain a contested and strategically weaponized chokepoint, with partial control, weakened legal norms and persistently elevated risks.

GREAT POWER REPOSITIONING

The war has served as the most revealing indicator of the actual capacity of the major powers to shape regional outcomes within the contemporary multipolar international system.

The end of the war may not restore regional equilibrium; it may accelerate the transition toward contested multipolarity, defined by a relative recalibration of U.S. influence, the continued expansion of Chinese economic and strategic engagement, and a Russian posture shaped by structural constraints and strategic opportunism.

The most likely post-war trajectory points toward competitive fragmentation, characterized by high competition, limited coordination, and enduring instability.

The result could be a consolidation of what may be described as multipolar incoherence i.e., a regional order in which no single power possesses the capacity to impose stability, and existing multilateral institutions struggle to enforce it.

In this context, the management of disorder would increasingly shift towards selective coalitions.

This structural condition would disproportionately disadvantage states lacking autonomous military capacity, thereby reinforcing the imperative for more inclusive and effective international governance mechanisms over competitive security architectures.

THE UNITED STATES

Washington is recalibrating its regional strategy toward offshore balancing, [43] driven by the financial cost of the conflict, growing domestic war fatigue, and increasing congressional resistance to open-ended military commitments.

In this evolving framework, the U.S. is shifting its role from a direct security provider to a security enabler, retaining naval dominance, deepening bilateral security agreements with key Gulf partners, sharing intelligence, and supplying arms, while encouraging regional actors to assume greater responsibility for their own security.

The U.S. continues to function as the ultimate security guarantor in the region, particularly in enforcing red lines related to nuclear escalation and the closure of the Strait of Hormuz.

However, its reduced forward military presence risks generating perceptions of declining credibility, thereby encouraging regional actors to hedge their strategic positions through diversified engagements with alternative powers.

These dynamic underline a broader structural tension in U.S. regional policy i.e., efforts to reduce direct engagement while retaining influence may result in neither a credible long-term commitment nor a complete disengagement, but rather a contested middle ground that fails to optimally serve the enduring interests of any actor.

However, a reduced external military footprint may also create space for genuine regional ownership of security arrangements, an outcome more consistent with the principle of non-interference.

CHINA

China's post-war posture is unlikely to conform to that of a conventional security guarantor. Instead, Beijing is expected to adopt a layered strategy that safeguards core interests, particularly energy security, economic continuity, and geopolitical positioning, while avoiding direct military entanglement in a volatile regional environment. Its gradual expansion beyond a primarily economic role is driven less by strategic ambition than by structural necessity.

As the world's largest importer of Gulf hydrocarbons, [44] any sustained disruption in the Strait of Hormuz would generate macroeconomic vulnerabilities that Beijing cannot afford to passively absorb. At the operational level, China is likely to pursue a strategy of functional accommodation toward Iran's emergent control mechanisms, tacitly accepting yuan-denominated transit frameworks and enhanced vetting procedures, provided these contribute to supply predictability, while stopping short of formally endorsing Iran's legal claims.

Concurrently, Beijing is expected to intensify structural hedging by accelerating the development of overland energy corridors through Central Asia, including those that intersect with regional connectivity initiatives such as the CPEC, [45] expanding strategic petroleum reserves, and investing in maritime alternatives. These measures are intended to reduce the Strait's potential as a source of coercive leverage over Chinese supply chains.

Diplomatically, China may seek to position itself as a selective stabiliser, advocating de-escalation and negotiated access arrangements, leveraging its expanding political capital in the Gulf, and avoiding leadership roles in enforcement mechanisms that could entail confrontation with either Iran or the U.S.

RUSSIA

Russia's post-war posture in the Middle East would be shaped by a convergence of strategic interests, structural constraints, and its deepening relationships with key regional actors. With the formalization of its partnership with Iran through the Comprehensive Strategic Partnership Treaty of October 2025[46], Moscow enters the evolving regional landscape as a politically engaged actor with clearly defined priorities; sustaining energy market conditions favourable to its domestic economy, preserving existing security relationships in the region, and maintaining a consequential diplomatic role within multilateral frameworks, particularly the United Nations Security Council. These interests are neither exceptional nor inherently illegitimate; they reflect the behaviour of major powers pursuing economic and strategic objectives through available instruments. Russia's continued engagement in regional affairs, through arms supply relationships,

diplomatic positioning, and coordination within energy markets, conforms to the logic of great power competition.

What distinguishes Russia's post-war position is not the nature of its intentions but its constraints; the ongoing Ukraine conflict has imposed sustained pressure on its military capabilities, economic resources, and diplomatic bandwidth, thereby limiting the scale and effectiveness of its regional engagement.

The interaction among the U.S., China, and Russia is likely to produce a regional order characterized by overlapping spheres of influence rather than coherent governance, reinforcing a condition best described as competitive fragmentation. In such an environment, the Middle East is expected to experience an increased reliance on proxy warfare. Diplomatic engagement, inclusive of all regional stakeholders, remains the only sustainable response.

STRATEGIC SCENARIOS: MAPPING THE POST-WAR MIDDLE EASTERN ORDER

Instead of mapping a single deterministic future scenario, a systematic exploration of different plausible certainties can be a better approach to understanding the post-war Middle Eastern order. In this strategic assessment, four different strategic scenarios are identified based on core drivers and organized them along two critical uncertainties: the level of regional cooperation, and the degree of nuclearization.

There are certain enduring drivers that would remain central to all of the future scenarios. The varying degree of structural diffuseness of these geopolitical and technological drivers would shape the realities of the region. This study identifies four baseline drivers of the post-war order that include; continued proliferation of missiles and unmanned aerial vehicle (UAV) technologies, trajectory of Iranian nuclear programme, role of Strait of Hormuz, and role of Major Powers.

In the ongoing war, the role of missile systems, drones, and missile defense systems has emerged as an important factor in the cost-benefit calculus of the states.

After the war, an increased proliferation of missiles, drones and counter-missiles and counter-drone systems would become a defining feature of regional military landscape. Moreover, the future trajectory of Iran's nuclear programme would play an important role in defining the regional landscape.

Further, the Strait of Hormuz would remain as an important chokepoint with global implications.

Finally, the relative role of the U.S., China and Russia in the region would steer the post-war order towards a more competitive rather than hegemonic one. These structural variable can generate four distinct scenarios for regional order: Managed Stability (Cooperation with Low Nuclearization), Nuclearized Stability (Cooperation with High Nuclearization), Persistent Grey-Zone Conflict (Rivalry with Low Nuclearization), and Fragmented Arms Race (Rivalry with High Nuclearization). Each scenario represents a coherent but contingent pathway for the post-war order.

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**THE VARYING DEGREE OF STRUCTURAL
DIFFUSENESS OF THESE GEOPOLITICAL AND
TECHNOLOGICAL DRIVERS WOULD SHAPE THE
REALITIES OF THE REGION**

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SCENARIO 1: MANAGED STABILITY

One plausible outcome of the ongoing war can be of managed stability: limited cooperation among the regional actors and low probability of nuclear proliferation. In this scenario, deterrence would remain largely conventional with a high probability of proliferation of missile and UAV systems.

One important feature of this scenario would be the emergence of an informal or semi-formal security arrangement between the actors. This arrangement can be in the form of security assurances to all the regional actors in any form to reduce the possibility of flaring up of conflict.

The Strait of Hormuz can evolve as a managed but contested space.

It can lead to a continuation of military posturing but as a source of coercive signaling by Iran to deter any future attacks. The role of major powers can be stabilizing with the U.S. retaining a reduced but credible security presence.

An agreement, similar to JCPOA can emerge in this scenario where some sanctions on Iran can be rolled back for removing the stockpiles of Highly Enriched Uranium (HEU).

Although, the ideological drivers of conflict may remain, this scenario can produce a managed stability in which rivalry persists but is bounded by mutual recognition of escalation risks.

SCENARIO 2: NUCLEARIZED STABILITY

Another possible post-war order can be in the form of limited cooperation with a high probability of nuclear proliferation. In this scenario, Iran decides to build its nuclear weapons and dash towards a strategic deterrent.

This can augment the risks of horizontal nuclear proliferation with Saudi Arabia and the United Arab Emirates following a similar path. The presence of nuclear capabilities can change regional dynamics, with cooperation driven less by trust and more by necessity.

This can increase the role of major powers in facilitating nuclear risk-reduction measures and managing the risks of a nuclearized conflict. The role of the Strait of Hormuz would remain vital but will become shrouded under the broader logic of strategic deterrence.

This scenario would reduce instability in the region, with the possibility of conventional war reduced; however, any breakdown in deterrence can have catastrophic consequences.

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THE PRESENCE OF NUCLEAR CAPABILITIES CAN CHANGE REGIONAL DYNAMICS, WITH COOPERATION DRIVEN LESS BY TRUST AND MORE BY NECESSITY
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SCENARIO 3: PERSISTENT GRAY-ZONE CONFLICT

One probable outcome of the ongoing war in the Middle East is a fragile ceasefire agreement with end of hostilities. In this scenario, a gray-zone asymmetric conflict prevail in the region with sustained rivalry between the principal regional actors. This scenario is highly unstable with an increased risk of resumption of hostilities. There would be an increased proliferation (both horizontal and vertical) of missiles, drones, missile defense and counter drone systems.

The possibility of nuclear proliferation is lower because any attempt of uranium enrichment by Iran can lead to escalation and use of force by the U.S. and Israel.

Moreover, the already stockpiled HEU would be removed by Iran as part of the negotiations to end the war. Maritime tensions in the Strait of Hormuz would intensify, with periodic incidents involving harassment and temporary closure of strait. The role of U.S. would only increase further with more troops stationed in the region to keep a sustained pressure on Tehran.

There would be less probability in easing of sanctions on Iran. This kind of situation would not bode well for China as it can disrupt its energy security supply chain.

SCENARIO 4: FRAGMENTED ARMS RACE

The most destabilizing outcome of the ongoing war can be fragmented Arms Racing, combining rivalry with high chances of nuclear proliferation. In this scenario, the cessation of hostilities and a fragile ceasefire are followed by an increased effort to develop nuclear weapons by Iran. The difference from the previous scenario would be that Iran will retain its already existing stockpile of HEU, providing it with the capability to achieve nuclear latency in a relatively shorter period of time. Moreover, Iran can formally withdraw from the Non-Proliferation Treaty (NPT).

This can lead to an overt nuclear arms race in the region with Saudi Arabia, UAE, and Turkey striving for their own deterrent. Similarly, Israel can further strengthen its nuclear forces in this scenario by pursuing a nuclear powered submarine to augment its second-strike capabilities.

Oil price shocks, capital flight, and sanctions regimes interact to produce systemic financial stress. Food security deteriorates sharply in import-dependent states, increasing the risk of domestic unrest. Great powers, rather than stabilizing the system, become participants in competitive alignment structures. The U.S. reinforces security commitments to select partners, China deepens its engagement to protect energy interests, and Russia leverages instability for geopolitical gain.

The region effectively becomes an arena of overlapping and competing spheres of influence. The Strait of Hormuz becomes a focal point of strategic competition, with frequent disruptions and a high risk of escalation. Maritime security deteriorates as multiple actors engage in coercive signaling and interdiction.

	Low Nuclearization	High Nuclearization
Cooperation	<p>Scenario I: Managed Stability</p> <ol style="list-style-type: none"> 1) Iran gives up its HEU stockpile 2) Informal regional security arrangements 3) Stabilized Strait of Hormuz 4) Great powers act as balancers 	<p>Scenario II: Nuclearized Stability</p> <ol style="list-style-type: none"> 1) Iran weaponizes or reaches a credible breakout 2) Limited nuclear multipolarity (Saudi Arabia, others) 3) Emergence of deterrence equilibrium 4) Possible arms control mechanisms
Rivalry	<p>Scenario III: Persistent Grey-Zone Conflict</p> <ol style="list-style-type: none"> 1) No overt nuclearization (Iran gives up its HEU stockpile) 2) Proliferation of Missile and UAV technologies 3) Hormuz sees intermittent tensions 4) Chronic but contained instability 	<p>Scenario IV: Fragmented Arms Race</p> <ol style="list-style-type: none"> 1) Regional nuclear cascade (Overt and Covert Nuclearization efforts) 2) Weak/non-existent arms control 3) Highly militarized Hormuz 4) Frequent crises with escalation risks

POST-WAR SCENARIO'S STRATEGIC MATRIX

PAKISTAN'S STRATEGIC ASSESSMENT IN A U.S.-ISRAEL AND IRAN WAR

In the ongoing U.S.-Israel and Iran war, Pakistan is dealing with three key interconnected strategic challenges, the severity of which changes across different scenarios, from managed stability to a fragmented arms race. First, Pakistan's strong dependence on Gulf oil passing through the Strait of Hormuz makes it highly vulnerable. This risk is relatively manageable in stable scenarios but can turn into serious economic trouble during conflict and escalation.

Second, Pakistan faces a difficult balancing act in its foreign policy, as it tries to maintain good relations with both the U.S. and China, while also preserving its close ties with Iran and important Gulf partners like the United Arab Emirates and Saudi Arabia, something that becomes harder as great power competition intensifies.

Third, Pakistan is concerned about the possibility of nuclearization in the Middle East, since any expansion of nuclear capabilities in the region, especially in more unstable scenarios, could weaken global non-proliferation efforts and affect the strategic balance in South Asia.

Overall, these challenges highlight the need for Pakistan to adopt a flexible and scenario-based approach to effectively respond to both stable and conflict-driven regional developments.

SCENARIO I: MANAGED STABILITY

COOPERATION AND LOW NUCLEARIZATION

Under the scenario of managed stability, Pakistan's strategic assessment would be cautiously optimistic, as this outcome offers a relatively stable external environment while preserving Islamabad's room for diplomatic and economic maneuverability. The persistence of low nuclearization aligns with Pakistan's interest in preventing a wider proliferation cascade in the Middle East, particularly avoiding pressures that could arise from potential nuclearization of Gulf states; however, the increasing diffusion of missile and UAV technologies would still necessitate a gradual enhancement of Pakistan's conventional and counter-drone capabilities.

From an energy security perspective, the managed but contested nature of the Strait of Hormuz ensures continuity of energy flows, thereby shielding Pakistan from severe balance-of-payments crises,

although moderate price volatility and elevated shipping costs would require prudent economic management, including long-term energy contracts and the development of strategic petroleum reserves.

The stabilizing yet competitive role of major powers, where the U.S. maintains a limited security presence, China expands as a geo-economic stabilizer, and Russia acts as a selective balancer, creates a favorable multipolar setting that complements Pakistan's long-standing hedging strategy, allowing it to deepen economic engagement with China while sustaining functional ties with the U.S. and Gulf partners.

Moreover, the emergence of pragmatic coordination between Iran and U.S.-aligned actors, potentially through a JCPOA-like arrangement, could open limited avenues for Pakistan to cautiously expand trade and energy cooperation with Iran without triggering sanctions risks.

In this context, Pakistan's optimal approach would be one of active neutrality, leveraging diplomatic balance to position itself as a bridge between competing regional actors, while capitalizing on geoeconomic opportunities such as Gwadar's role in regional connectivity, and simultaneously strengthening economic resilience and selective military capabilities to hedge against residual uncertainties inherent in a managed but still contested regional order.



SCENARIO II: NUCLEARIZED STABILITY

COOPERATION AND HIGH NUCLEARIZATION

Under the scenario of nuclearized stability, Pakistan's strategic assessment would be markedly cautious, as the emergence of a nuclear-capable Iran and the potential for horizontal proliferation among Gulf states would fundamentally alter the regional security architecture. While the presence of multiple nuclear actors may reduce the likelihood of large-scale conventional war through deterrence, it simultaneously normalizes nuclearization in the Middle East, thereby weakening global non-proliferation norms.

From an energy security perspective, the Strait of Hormuz would remain operational but increasingly embedded within a deterrence framework, ensuring continuity of energy flows while heightening systemic risk premiums in global oil markets; this would translate into manageable but persistent economic pressure for Pakistan through elevated prices and insurance costs.

The enhanced role of major powers, particularly the U.S. and China, in managing nuclear risk and enforcing stability would reinforce a structured multipolar order, allowing Pakistan to continue its hedging strategy, though with greater scrutiny on its nuclear posture and export controls. In this context, Pakistan's optimal approach would be to reinforce its commitment to credible minimum deterrence while avoiding any association with Middle Eastern nuclearization dynamics, and advocate for nuclear risk-reduction measures at regional and global forums.

Simultaneously, Islamabad should prioritize energy security through diversification and long-term agreements, while maintaining strategic neutrality and carefully expanding economic engagement with both Iran and Gulf states, ensuring that it benefits from relative stability without being drawn into the strategic vulnerabilities of an increasingly nuclearized regional order.

SCENARIO III: PERSISTENT GRAY-ZONE CONFLICT

RIVALRY AND LOW NUCLEARIZATION

Islamabad would view this scenario as a prolonged instability trap in the Middle East, characterized by persistent gray-zone conflict between the U.S. and Iran, without crossing the nuclear threshold but with sustained risks of escalation. Islamabad would assess that continued tensions in the Strait of Hormuz pose a direct threat to global energy flows, thereby exposing Pakistan's import-dependent economy to price volatility, supply disruptions, and balance-of-payments pressures.

The deepening U.S. military footprint and Iran's alignment with Russia would be seen as reinforcing great-power competition in the region, while also indirectly affecting China's energy security, an important consideration for Pakistan given its geoeconomic linkages under CPEC.

Pakistan would further assess that the persistence of gray-zone warfare, through precision strikes, proxy engagements, and maritime harassment, lowers the threshold for limited conflict while increasing unpredictability, creating a structurally unstable regional environment.

Although nuclear proliferation risks remain low in this scenario, Islamabad would recognize that sustained conventional and sub-conventional conflict dynamics could disrupt regional stability.

Additionally, expanding military cooperation between Iran and Russia, alongside Ukraine's defense engagements with Gulf states, would be viewed as contributing to a broader interconnected conflict system, where technological diffusion (e.g., drones, missile defense) accelerates militarization across regions.

Overall, Pakistan's assessment would frame this scenario as one of chronic instability with high economic costs and moderate security spillover risks, requiring careful management of external dependencies, particularly in energy and remittances, while avoiding entanglement in an increasingly polarized regional order.

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PAKISTAN'S OPTIMAL APPROACH WOULD BE ONE OF ACTIVE NEUTRALITY, LEVERAGING DIPLOMATIC BALANCE TO POSITION ITSELF AS A BRIDGE BETWEEN COMPETING REGIONAL ACTORS

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SCENARIO IV: FRAGMENTED ARMS RACE

RIVALRY AND HIGH NUCLEARIZATION

Under the scenario of a fragmented arms race, Pakistan's strategic assessment would be deeply alarmed, as this outcome represents the most destabilizing convergence of rivalry, overt nuclear proliferation, and systemic economic disruption in the Middle East. The likelihood of Iran advancing toward rapid nuclear latency, potentially coupled with withdrawal from the NPT, and the subsequent pursuit of nuclear capabilities by Saudi Arabia, the UAE, and Türkiye would normalize a multi-actor nuclear competition, severely undermining global non-proliferation norms and increasing the risks of miscalculation. From an energy security perspective, the consequences would be severe: recurrent disruptions in the Strait of Hormuz would trigger sharp oil price spikes, inflate shipping and insurance costs, and exacerbate Pakistan's balance-of-payments vulnerabilities, potentially leading to inflationary shocks, currency depreciation, and increased reliance on external financing.

The risk of capital flight and declining remittances from an economically strained Gulf would further compound domestic economic pressures, while food and energy insecurity could generate internal instability. In such a high-risk environment, Pakistan's optimal strategy would center on crisis management and resilience: maintaining strict strategic neutrality while intensifying backchannel diplomacy with Iran and Gulf states to avoid entanglement; strengthening export control to preclude proliferation concerns; urgently enhancing energy security through diversification and strategic reserves; and reinforcing internal economic and security buffers to withstand external shocks. Ultimately, this scenario would compel Islamabad to prioritize economic survival and internal stability over external ambitions, as the regional order shifts from managed competition to volatile fragmentation with potentially catastrophic consequences.

REGIME CHANGE

REGIONAL INSTABILITY AND CROSS-BORDER SPILLOVER

A potential U.S. plan to pursue regime change in Iran would significantly complicate Pakistan's strategic environment across all four scenarios, but especially push the region toward the more destabilizing trajectories. Recent developments already indicate that Washington is willing to escalate pressure on Tehran, including threats against critical infrastructure and engagement with a "new, more reasonable" political setup.[47]

From Pakistan's perspective, regime change would likely produce instability rather than immediate stability, as internal political fragmentation in Iran could spill over into neighbouring regions.

Given Pakistan's shared border with Iran, any breakdown of state authority could trigger cross-border security challenges, refugee flows, and sectarian tensions, all of which historically tend to spill beyond national boundaries.

Economically, such a transition would heighten uncertainty in the Strait of Hormuz, amplifying oil price shocks and disrupting energy supplies thereby intensifying Pakistan's existing vulnerability. Strategically, regime change would also sharpen Pakistan's geopolitical dilemma: overt or perceived support for a U.S.-backed transition could strain ties with Iran and domestic constituencies, while opposition could complicate relations with Washington and key Gulf partners.

Moreover, from a nuclear perspective, the collapse or weakening of central authority in Iran could either accelerate covert nuclearization or lead to loss of control over sensitive materials, increasing proliferation risks. Consequently, Pakistan would strongly prefer regime stability over externally imposed change, as a controlled status quo, however adversarial, is more predictable than a volatile transition.

In such a scenario, Islamabad's optimal approach would be to maintain strict neutrality, enhance border and internal security preparedness, and prioritize diplomatic efforts aimed at preventing state collapse in Iran, given that the costs of instability would disproportionately fall on immediate neighbours like Pakistan.

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**PAKISTAN HAS ENHANCED ITS IMAGE AS A RESPONSIBLE
MIDDLE POWER CAPABLE OF CRISIS MANAGEMENT AND
CONFLICT DE-ESCALATION**
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PAKISTAN'S ROLE AS A BRIDGE-BUILDER

DIPLOMATIC LEVERAGE AND REGIONAL MEDIATION

Pakistan's mediation efforts in U.S.-Iran talks have highlighted its role as a credible bridge-builder between adversaries, leveraging its balanced relations with both sides to facilitate dialogue and reduce escalation. By hosting negotiations and engaging in sustained diplomatic outreach, in which the U.S. and Iran held first-time direct talks in 47 years, Pakistan has enhanced its image as a responsible middle power capable of crisis management and conflict de-escalation.

This proactive diplomacy has consequently elevated Pakistan's international standing and relevance in West Asian geopolitics, positioning it as a key interlocutor in high-stakes negotiations.



POLICY RECOMMENDATIONS FOR PAKISTAN

1. Pakistan should continue to adopt active neutrality as a core state policy. By pushing for calibrated diplomacy rather than passive disengagement, it can preserve its strategic value and avoid entanglement in regional conflicts. While it hosts U.S.-Iran talks, it should continue to reaffirm its commitment to peaceful dispute resolution and non-interference, avoiding military alignments, and maintaining the policy of balanced ties with the Islamic Republic of Iran, the GCC, and the U.S.

2. Pakistan should continue facilitating dialogue as a bridge-builder, through both formal and backchannel diplomacy. While hosting ceasefire talks as a mediator, Pakistan should avoid taking any role as a guarantor or enforcement actor. By coordinating mediation with neutral partners such as China and the U.N., Islamabad can retain and elevate diplomatic relevance without incurring strategic liabilities in the future.

3. Pakistan should clearly ring-fence itself from military entanglement by setting firm red lines. It should guarantee that no troop deployment, operational assistance, or base access is provided to any party involved in the conflict. Security cooperation with Gulf States in defensive areas should continue, but Islamabad's priority should remain its India-centric deterrence posture. It will ensure its national resources are not diverted and escalation risks are avoided.

4. Pakistan should reduce its reliance on the Strait of Hormuz by strengthening energy security through building strategic petroleum reserves and diversifying imports, especially from Central Asia and Russia. At the same time, it should invest more in renewable energy and improve its domestic energy mix to minimize external vulnerabilities. This will help lower Pakistan's dependence on the Strait of Hormuz, which is a major structural risk for the country's energy security. Nuclear Energy can also play an important role in this regard.

5. Pakistan should protect its economy from Gulf-related shocks by creating contingency mechanisms for remittances and currency arrangements, while also diversifying export markets and strengthening food and energy reserves. This would help reduce its dependence on external factors and make the economy more resilient to geopolitical disruptions.

6. Pakistan should strengthen border and internal security by improving management along the Balochistan frontier, preparing for possible refugee inflows, and preventing sectarian tensions within the country. This is important to contain spillover risks from instability in Iran and protect domestic stability.

7. Pakistan should take a diplomatic stance against further nuclearization in the Middle East while promoting regional nuclear restraint frameworks that do not limit its own strategic interests. At the same time, it should support IAEA-based monitoring to help maintain stability and prevent the weakening of non-proliferation norms.

8. Pakistan should use its geo-economic position to turn the crisis into an opportunity by developing Gwadar as a long-term logistics hub, linking Middle East recovery with CPEC routes, and participating in post-war reconstruction on a civilian and economic basis. This approach helps translate diplomatic engagement into economic gains without getting strategically entangled.

9. Pakistan should avoid taking sides in any regime change discourse by opposing external intervention and supporting sovereignty and territorial integrity. It should also refrain from rhetoric that aligns it with either the U.S. or Iran, ensuring consistency with its established foreign policy principles based on international law and U.N. Charter.

10. Pakistan should establish a dedicated policy cell to monitor key developments like the Strait of Hormuz, Iran's nuclear trajectory, and great power involvement, while preparing responses for different scenarios. This would help shift Pakistan towards a more proactive and anticipatory strategy.



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