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Executive Summary

In this report, you will find analysis on current affairs by our team of established experts. The aim of the discussion was to share different perspectives on the US missile strikes on Iran nuclear infrastructure. Based on our varying expertise and knowledge our team shared short-term and long-term implications of the strikes, highlighted key consequences for stakeholders, and forecasted the future of the Middle-East region.

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Country-specific analysis

Below you may find analysis divided by country.

Israel:

1. Did not use the same approach as in Lebanon i.e. they agreed with Iran on a ceasefire before negotiating other issues while with Hezbollah they agreed to a ceasefire only as part of a broader agreement that included multiple assurances for Israel.
2. It is important to analyze the reasons behind such a change in the approach.
3. All signs show that Israel will have to handle multi-dimensional implications following the conflict that erupted on Oct 7, 2023:
    a. Reconstruction (massive destruction in big Israeli cities or 1st time since 1948)
    b. Economic recovery and reintegration of reservists into the workforce
    c. Political disruption and polarization stemming from efforts to assign accountability for the failures of October 7th, as well as from some of the controversial decisions made in the aftermath.
    d. Continued military pressure resulting from the low-intensity (guerilla like) conflict expected to continue in Gaza.

USA

1. Confusion at all levels
2. Domestically, confusion especially around:
    a. Powers of the President and congressional role in situations like this one
    b. Relationship between the Administration and the intelligence community (strained by leaks and misalignments with the White House's policies and priorities)
3. Internationally:
    a. Mixed messages about the scale of the damage made to the three sites targeted by US strikes
    b. Confusion whether the strike against Iran will actually expedite or impede the diplomatic efforts (negotiations with Iran)

c. Uncertainty whether the Iranians will accept and whether the US will actually be able to impose that the next round of talks addresses not only the nuclear but essentially the ballistic missiles program

Iran

1. Nuclear weapons are not the end goal. It is used as a distraction and leverage.
2. In parallel, Iran invested hugely in two other tracks that can still pose a threat (details in next section):
    a. Ballistic missiles program
    b. Proxies dispersed across the region
3. Regime proved to be resilient domestically
4. They are cultivating a sense of victory to boost their support (domestically and in the region)
5. Diplomatic honeymoon with GCC countries (since 2020) proved to be useful to Iran

MENA Region

1. While Iran's proxies in Syria have been neutralized or eliminated, the Houthis succeeded in maintaining most of their operational capabilities and continue to pose a threat to Israel, the GCC countries and maritime traffic.
2. Hezbollah lost many of its capabilities to confront Israel, but this does not mean that they cannot reconstitute their capabilities.
3. Iran's proxies in Iraq were never as effective as Hezbollah or the Houthis but can target US interests in Iraq and in Syria (clandestinely). So far, they almost hibernated since Oct 2023 for fear of being obliterated by the Israelis, but they may pose a threat to a certain extent.

Conclusion

1. Israel and the US missed a golden opportunity of completely subduing Iran like Israel did with Hezbollah before the signature of the Lebanon-Israel cease fire agreement.
2. Iran's capabilities, domestically (including nuclear and regionally (its proxies) have been severely damaged but do not seem to be irreparable.
3. Therefore, short of a sustained multidimensional (economic…) pressure and a credible military threat pending above the head of

the regime, as well as proactive and forceful impediment of Iran's attempts to recover (in Iran, Yemen, Syria, Iraq and Lebanon), Iran will recover in few years and resume its role of a regional bully.

Commentary

by Robert Cutler

Iran stands at a pivotal geoeconomic juncture, yet its path forward is obstructed by ideological rigidity and institutional inertia. What is needed is not mere diplomatic readjustment, but a full system-structural repositioning. The stakes are not confined to Iran's national orientation but extend to its international-systemic role: whether it remains a stagnating zone of strategic obstruction or evolves into a conductor linking emergent dynamic macroregions.

One such macroregion is the Pan-Caspian Corridor Complex (PCCC), encompassing Central Asia, the South Caucasus, and the trans-Caspian corridor crossing the sea itself. The PCCC is consolidating through expanding energy corridors, digital infrastructure, and logistics. Though not a formal bloc, it is emerging as a quasi-collective actor of growing systemic relevance. As legacy powers recede, the PCCC's influence will increase.

From a multi-decadal perspective, these receding powers include China as well as Russia, Iran's principal strategic patrons, both of which face long-term demographic and economic decline. Their rivalry—along with Türkiye's—for influence in the PCCC will intensify even as their structural capacity weakens.

In contrast, a new macroregional dynamic is emerging among India, Israel, and Saudi Arabia, rising powers with favorable demographics, expanding economies, and converging strategic interests. Initiatives like the India–Middle East–Europe Corridor (IMEC) illustrate a geoeconomic logic oriented toward integration. If Iran could reorient accordingly, it might help consolidate an India–Israel–Iran–Saudi Arabia Quadrilateral (I3SA Quad).

However, such a pivot is not possible under the current regime. Its outdated strategic logic cannot accommodate the antifragile repositioning now required. Yet a future counterelite—technocratic, diasporic, or internally reformist—could arise. Should such leadership emerge and mobilize Iran's latent resources, the country could reorient its trajectory. Bordering Turkmenistan and Azerbaijan, Iran is geographically positioned to serve as a strategic link between the PCCC and the I3SA Quad.

Iran now faces a decisive crossroads: decline with its Eurasian patrons, or integrate with the rising powers of a multiplex global order. This choice will shape not only Iran's development, but also the future global architecture. As the current international system approaches collapse in the early 2040s and a transitional period until its successor begins to take shape in the late 2050s,

Iran’s decision will influence how that transition proceeds and the nature of the successor international system to the current one.

A quick assessment of the Israel – Iran 12 days war and the way ahead

by RAdm (ret.) Efstathios (Stathis) Kyriakidis

From an operational perspective, after the surprisingly quick suppression of the Iranian air defence and the achievement of air supremacy of the Israeli air force, the question was for how long the Iranian forces could sustain a high operational tempo.

Apparently, either their capabilities were severely reduced, be it the ballistic missile strategic arsenal, be it the lack of replenishment, be it the launching sites' destruction, or the Iranian forces are performing a tactical maneuver since they correctly assessed there was no point to continue the fight under the circumstances.

The main problem that keeps us from having an accurate assessment on the ground, is the lack of credible information within the Iranian soil. How successful were the attacks on the nuclear sites? Was there a full damage assessment performed? Had the enriched uranium been removed prior to the attack in Fordow nuclear facility? What is the actual remaining ballistic missiles inventory of the Islamic Guards?

The way that a theocratic militarized regime agreed so quickly to the fragile cease fire, after a pseudo-retaliation attack on the US Base in Qatar, leaves us with more questions than answers. We should be very careful on the actual remaining capabilities of the Iranian Revolutionary Guard, probably kept intact to ensure the regime's survival; however, a new wave of terrorist attacks and war of attrition should not be excluded.

Discussion Overview

by Emily K. Wallerstrom

Below you may find a summary of talking points which were raised in the discussion by SI experts.

Energy and Natural Resources:

- Iran has consistently upheld its position that it will not relinquish its right to the peaceful use of nuclear energy. This commitment remains central to Iran's long-term strategic orientation. The threat to withdraw from the Nuclear Non-Proliferation Treaty (NPT) represented a significant escalation, carrying implications for regional security and the global non-proliferation regime. This led to heightened tensions and further diplomatic isolation for Iran.
- Iran's decision not to close the Strait of Hormuz is particularly noteworthy. Recognizing the critical importance of oil exports to both its national economy and the global energy market, Iran prioritized the continuity of energy flows as a means to avoid further escalation. This strategic restraint underscores a broader recognition of the energy market's potential role as a stabilizing factor and an endpoint to open conflict.

US foreign policy:

- The US decision to engage in direct attacks on Iranian nuclear facilities marked a substantial departure from previous patterns of containment, effectively signalling a willingness to project military power beyond traditional spheres.
- The election of President Trump in 2016 represented the first credible indication that regime change in Iran could become a serious policy objective. His administration adopted an unpredictable and often contradictory diplomatic approach, evidenced by unorthodox gestures such as publicly praising Iran for providing advance notice of its attack in Qatar. Such actions reflected a lack of coherent strategic grounding and raised concerns regarding the consistency of US foreign policy.

Iran regime change:

- Despite widespread recognition of the Iranian regime as a central driver of regional conflict, European states strongly opposed any efforts towards regime change. Their preference lay in preserving stability rather than risking the collapse of Iranian governance structures. Analysts contend that a sustained US offensive could have resulted in the eventual downfall of the regime; however, this outcome would likely

have precipitated significant regional chaos, for which the US would bear substantial responsibility.

- This reflects an ongoing debate on the limits of foreign intervention, and how powerful states should exercise their influence. While sentiment in Iran broadly supports a regime change, history shows that externally imposed regime changes may prolong internal conflict, fuel nationalist sentiment, and lead to long-run destabilization in the region.

Humanitarian cost:

- While strategic goals often guide foreign policy, the human cost is profound. The ongoing regional conflict has shown that soldiers and civilians alike are the first to lose their livelihoods and future prospects. Local communities face widespread suffering and instability, through displacement, economic hardship, and personal loss.

Commentary

by Lieutenant General ret. Dimokritos Zervakis

Israel took advantage of a window of opportunity to dismantle Iran's nuclear weapons acquisition capability:

1. Iran's military capabilities were overestimated. Her central deterrence capability and strategic reach were based on its proxies. Their defeat by Israel weakened Iran.
2. Israel successfully and relatively easily neutralized Iran's air defense and gained airspace superiority over Iran.

While Trump, following his MAGA doctrine and declared aim to end "all wars", gave ambivalent signals on supporting an Israeli strike on Iran's nuclear installation, it seems that in his mind he was preparing the ground. His support to the new regime in Syria, his visit in the area without Israel as a stopover, the repositioning of the US forces on the broader region, and among others (but not the least) the readiness that the financial markets to adapt to the US attack and Iran's attempt to de-escalate, are indications of this.

Short assessment:

1. Israel will take any advantage to eliminate Iran's ballistic missile capability further, and will continue until there is adequate control over Iran's nuclear program.
2. In Iran, the regime, in fighting for survival, will take any offer for de-escalation. A regime change, while welcomed, can come only through the Iranian people, who have a distinct strategic culture that should not be downplayed, e.g., it's not Libya or Syria or Iraq.
3. The United States under Trump will continue to be a "reluctant Sheriff," more eager, however, to use its might to achieve its ends, notwithstanding that post-WWII US power has been rooted mainly in cooperation rather than coercion. An Abraham Accord plus an IMEC corridor will be explored as a renewed security architecture in the region.
4. We will also need to anticipate the stances of other strategic competitors, such as Turkey, Saudi Arabia, and Egypt.
5. The EU has limited leverage in this conflict, and Russia shows an unwillingness to open a new front and to support Iran, which came to its aid against Ukraine. China comprehends its limitations, looking to the future.



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