



The Middle East Is in Flames— What Can We Expect Regarding the War in Iran?

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THE MIDDLE EAST IS IN FLAMES—WHAT CAN WE EXPECT REGARDING THE WAR IN IRAN?

The war launched by the United States and Israel against Iran has entered its third week, and there is currently no sign that the military intervention is coming to an end. Iran's military capabilities have been significantly weakened, with its navy, air defenses, and ballistic missile capacity all suffering substantial damage. Nevertheless, Tehran has chosen a strategy of escalation and prolonging the war, attempting to first regionalize and then globalize the conflict by disrupting the Strait of Hormuz—one of the world's major chokepoints. At the same time, Iran's resources are finite, yet the prospect of regime change has not yet materialized. The war could also reshape the relationship between the Arab states of the Persian Gulf and the United States.

WHERE DO WE STAND NOW?

The American and Israeli intervention against Iran, which started on February 28, 2026, and is now in its second week, has partially delivered the desired military successes. Already on the very first day of the attack, nearly 50 additional high-ranking figures were eliminated alongside Supreme Leader Ali Khamenei, thanks to outstanding intelligence. In the second week of the war, the United States and Israel destroyed sixty Iranian warships and 16 minelaying vessels; 90 percent of Iran's ballistic missile arsenal was wiped out, either by the military intervention itself or during launch attempts; the United States and Israel now control Iranian airspace; defensive capabilities have likewise been significantly degraded; and key uranium enrichment facilities, including Natanz, Fordow, and Isfahan, have sustained heavy strikes.¹ Nearly one thousand American and Israeli airstrikes have targeted mainly the country's western and southern regions, as well as the capital, Tehran.

1 U.S. Central Command (@CENTCOM), "Update from CENTCOM Commander on Operation Epic Fury," X, March 11, 2026, <https://x.com/CENTCOM/status/2031700131687379148?s=20>.

Washington has deployed B-2 heavy bombers for the second time since the June 2025 war, using them to strike underground missile launch sites. Trump put it this way: “We have won in many ways, but we haven’t won enough.” Washington most likely expected that, after establishing clear military superiority, Iran would surrender unconditionally and accept American terms.² Israeli Prime Minister Netanyahu stated that Israel would continue the offensive in order to “break the regime’s bones.”

While the U.S.–Israeli strikes have substantially weakened Iran’s military infrastructure, Tehran continues to resist the pressure of war with determination. It remains unclear, however, what internal political processes are unfolding inside Iran.

HOW STABLE IS THE IRANIAN REGIME?

Iran has been carefully preparing for war since June 2025, purchasing significant quantities of defensive equipment from Russia and further developing its missiles and drones. According to Tehran’s narrative, the protests that began last December are also a continuation of last summer’s armed conflict, and Iran had deliberately prepared for the attack. However, it was clearly a major surprise for Iran that, based on intelligence reports, Israel eliminated forty leaders of the Islamic Republic on Saturday, February 28, including Supreme Leader Ali Khamenei.

For Tehran, it was important to demonstrate that the regime had not collapsed under the attack. In accordance with the constitution, a three-member leadership council assumed Ali Khamenei’s powers. In recent days, however, it has become clearly visible even from outside the country that there is no full coordination between the various centers of power. Reformist President Pezeshkian apologized to neighboring states for the attack and indicated that Iran would no longer bomb them with missiles and drones. A few hours later, however, the Islamic Revolutionary Guard Corps (IRGC) unleashed another barrage of rockets against the military and non-military infrastructure of the surrounding Arab oil monarchies. All this indicates that the presidential office—and Pezeshkian personally—has been marginalized within the political structure. The reformists believed that the presidential position on the leadership

2 Andrew Roth, “Vague and Contradictory Trump Says Iran War ‘Won,’ But ‘Not Won Enough,’” *The Guardian*, March 10, 2026, <https://www.theguardian.com/world/2026/mar/10/trump-iran-war-over-pretty-quickly>.

council could influence the selection of the new Supreme Leader. This, however, did not happen; for the IRGC, Mojtaba represented the quickest solution in the current situation, allowing them to avoid power rivalries among the potential candidates.

Mojtaba is also a good choice because he embodies his father's martyrdom, carries forward the hardline views he represented, and at the same time steers the system toward rapid stabilization.³ Donald Trump expressed disappointment regarding the identity of the new supreme leader. Washington had calculated that if Ali Khamenei were eliminated, popular pressure would lead to a reformist cleric assuming the Supreme Leader position, one who would accept American terms and allow the military intervention to be quickly concluded with diplomatic success. In the present case, however, Mojtaba Khamenei cannot be considered a legitimate negotiating partner for either the United States or Israel, as he embodies the anti-American and anti-Israeli foreign policy of the past 37 years. In his first speech, Mojtaba indeed struck a hardline tone, stressing the continued threat to traffic through the Strait of Hormuz and the importance of Iranian resistance.⁴

Despite this outward projection of stability, the Iranian regime continues to possess a very low level of legitimacy. Supreme Leader Ali Khamenei's martyrdom and the military intervention itself have resulted a certain rallying around the regime,⁵ but once the current armed conflict ends, the fundamental social, economic, and societal problems will re-emerge, resulting once again in protests to which the regime will respond with repression.

From the standpoint of the United States and Israel's military action, it remains a problem that no political alternative to the current Islamic Republic has taken shape. The protests relaunched by university students at the end of February were halted by the war, and there is no visible individual or group that could be backed. Reza Pahlavi, who sends messages to the Iranian population from the diaspora, has also lost credibility in the eyes of many, as Iranian protesters themselves believe he sent tens of thousands of people to their deaths

3 Hamidreza Azizi, "How Mojtaba Khamenei Became the Supreme Leader?," *Iran Analytica*, March 11, 2026, <https://www.irananalytica.org/p/how-mojtaba-khamenei-became-the-supreme>.

4 According to some reports, Mojtaba Khamenei has been wounded and is in the hospital. His first speech was read on Iranian television; "Words of Defiance: Iran's New Supreme Leader Mojtaba Khamenei Lashes Out at the US," *Al Jazeera*, March 12, 2026, <https://www.aljazeera.com/news/2026/3/12/irans-mojtaba-khamenei-issues-first-statement-as-supreme-leader-amid-war>.

5 Vali R. Nasr, "A Resistance is Deepening in Iran," *New York Times*, March 12, 2026, <https://www.nytimes.com/2026/03/09/opinion/international-world/iran-supreme-leader-mojtaba-khamenei.html>.

by calling for unrest. Donald Trump personally does not consider Reza Pahlavi a suitable alternative to the current Islamist system either.

In this situation, the only option is to support minority groups within Iran or in neighboring countries. The Kurdish minority constitutes approximately 10 percent of Iran’s population, and its armed groups operate partly from Iraq. Five Iranian groups formed an alliance in the weeks before the war to act jointly against the regime. The Iraqi Kurds, however, have indicated that they do not wish to participate in such a war. It is also highly questionable whether playing the minority card would not push the population even more strongly toward rallying around the regime. The Sunni imam who in recent years regularly called for anti-regime actions spoke last Friday about cohesion and national unity. All this suggests that regime change from the outside will be difficult to achieve. It would nevertheless be a mistake to claim that the regime is stable, as the December wave of protests stemmed from genuine underlying problems.⁶

THE IRANIAN STRATEGY: ESCALATION AND PROTRACTED CONFLICT

Iran’s strategy, instead of unconditional surrender at Trump’s request, is pursuing exactly the opposite course: the temporal prolongation and spatial expansion of the war. This rests on a strategic calculation that Iran aims to transform the fundamentally trilateral conflict first into a regional and then a global one. In the opening days, Iran attacked 13 neighboring countries, with rockets striking not only the Arab states of the Persian Gulf region but also Azerbaijan, Turkey, and Cyprus. The primary purpose of these strikes is to compel those states to exert diplomatic pressure—specifically, to persuade Donald Trump to halt the war immediately. Iran is well aware that none of the 13 attacked countries has any interest in entering the war launched by the United States and Israel.⁷

This strategy will only be viable in the short term, however, because it is almost certain that these states will reconsider their relations with Iran, which had been improving in almost every case over the past few months. This is true of Azerbaijan as well: Within the framework of its new neighborhood policy, the Iranian leadership had opened up, and after the attack on the Nakhchivan enclave, the border was reopened and humanitarian aid shipments began. At the

6 Ellie Geranmayeh, “A Kurdish Rebellion in Iran Could Be a Disaster,” *New York Times*, March 11, 2026, <https://www.nytimes.com/2026/03/11/opinion/iran-kurds-us-israel.html>.

7 Robert A. Pape, “Why Escalation Favors Iran,” *Foreign Affairs*, March 9, 2026, <https://www.foreignaffairs.com/iran/why-escalation-favors-iran>.

same time, Iran fears that Azerbaijan will arm the Azerbaijani minority in the country and ultimately sees an opportunity for the reunification of territories.

Among the six member states of the Gulf Cooperation Council (GCC), the United Arab Emirates has suffered the greatest number of rocket and drone attacks. Dubai has been hit on several occasions, including its airport, hotels, and the port of Fujairah, which is critical for oil shipments. In addition, Kuwait, as well as Oman and Qatar, which both play mediating roles, have faced daily attacks. The strikes on the UAE are driven by the aim of dismantling the Abraham Accords, an objective that has not been achieved. Tehran expects that the regional escalation will weaken the close ties between the GCC states and the United States and will exert pressure on Donald Trump to bring the war to an end.⁸

THE STRAIT OF HORMUZ AND ENERGY INFRASTRUCTURE AS A WEAPON

Iranian propaganda has announced on several occasions that the Strait of Hormuz will remain closed until the end of the war, with the goal of raising the price of oil to \$200 per barrel. They will only permit passage to ships from those states that expel their American and Israeli ambassadors. Despite Iranian propaganda, the Strait of Hormuz is not officially closed. However, instead of the average 60 tankers per day, only a few have managed to pass through. In recent days, tankers flying Iraqi, Liberian, and Thai flags have come under attack, with most ships either turning back or not leaving the Persian Gulf region. Some ships have switched off their radar signals, thereby evading the vigilance of the Iranian navy. In normal times, roughly one-fifth of the world's seaborne oil trade and one-third of the liquefied gas trade pass through the Strait of Hormuz. The primary destination markets are the major Asian economies, above all China, India, Japan, and South Korea. The strait is a primary maritime chokepoint that cannot be substituted with alternative pipelines. In Saudi Arabia, the so-called East–West Crude Oil Pipeline can transport seven million barrels of oil per day, but the capacity of the Yanbu port is significantly smaller.

In addition to obstructing shipping traffic in the Strait of Hormuz, Iran is deliberately targeting oil and gas infrastructure, as well as ports that are critical for transportation. Currently, the oil price has risen from \$60 per barrel to over \$100, and if these states suffer further attacks, additional increases can

8 Ali Bakr, "Could a GCC Energy Embargo Halt the US-Israel War on Iran?" *Middle East Eye*, March 11, 2026, <https://www.middleeasteye.net/opinion/how-gcc-energy-embargo-could-halt-us-israel-iran-war>.

be expected. Shipping through the Strait of Hormuz can easily be restored, but damage to oil refineries and ports could restrict production for several months. The important question remains how long Iran will persist with these rocket and drone attacks.⁹

WHEN WILL THE WAR END?

Initially, Donald Trump counted on a four- to five-week war, a scenario that could be realistic in certain respects. Now that Iran’s military capacity has been substantially weakened, Washington can essentially write off the intervention as a success at any moment, even if no regime change takes place in Iran. As long as Iran continues to attack Israel and the neighboring Arab states, however, it is difficult to envisage the war coming to a close. In the second week, Iran launched new types of bombs toward Israel that caused serious damage to civilian facilities and injured a great many people. Even if its ballistic missiles are exhausted, the country has an almost unlimited supply of drones and explosives with which it can persistently sustain the destabilization of the Persian Gulf region. The fact that the war will most likely conclude without regime change raises the possibility of repeated military interventions.¹⁰

In the second week of the war, the United States is also considering the deployment of special commando forces. The objective is particularly to secure nuclear facilities and to locate the highly enriched uranium stockpiles present in the country. This, however, would tie down a significant number of troops, the potential casualty count could be high, and the mission’s outcome remains doubtful.

Although the United States and Israel are coordinating the conclusion of the war as well, their objectives differ to some extent. Washington primarily seeks to constrain the nuclear program and neutralize the Iranian threat. While every Israeli government also embraces these goals, regime change is being articulated as a clear expectation, through which the Jewish state aims to establish a new regional order. It remains questionable, however, whether the time for this has now arrived, or whether the Iranian issue will continue to keep and tie down

9 Phillip Brown et al., “Iran Conflict and the Strait of Hormuz: Impacts on Oil, Gas, and Other Commodities – Analysis,” *Eurasia Review*, March 11, 2026, <https://www.eurasiareview.com/11032026-iran-conflict-and-the-strait-of-hormuz-impacts-on-oil-gas-and-other-commodities-analysis/>.

10 Colin H. Kahl, “What is the Endgame in Iran?,” *Foreign Affairs*, March 10, 2026, <https://www.foreignaffairs.com/iran/what-endgame-iran>.

the United States in the region over the longer term. What emerges from the events so far is that Iran will tie down the resources of both regional states and the global powers for the foreseeable future.



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