

GEOPOLITICAL RISK OBSERVATORY

Possible outcomes of the conflict in Iran

An overview

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GRO Overview: Possible outcomes of the conflict in Iran

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Premise

When assessing the possible evolution of the situation in Iran, several structural factors should be taken into account, as they define the realistic boundaries of current political and strategic options.

First, the United States does not appear willing to deploy ground troops. Second, there is currently no organized opposition within Iran capable of constituting a credible governing alternative in the short term.

Taken together, these two elements make the prospect of a rapid regime change unlikely. This situation places Washington before a strategic dilemma that remains unresolved. On the one hand, a regime change would require the use of instruments—most notably direct military involvement—that the United States is not prepared to employ. On the other hand, without a change in regime it appears difficult to achieve, in a durable and sustainable way, two key strategic objectives: preventing Iran from maintaining its uranium enrichment capability and eliminating its ballistic missile capacity.

Based on these premises, three possible scenarios can be outlined.

Scenario 1 - Regime Continuity with an Internal Rebalancing of Power

In this scenario the regime remains in place but undergoes an internal transformation. A rebalancing of power could occur, with greater influence exercised by the Islamic Revolutionary Guard Corps (IRGC) and the military-industrial apparatus relative to the clerical establishment.

In this regard, the designated Supreme Leader Mojtaba Khamenei's background within the Pasdaran and the Basij paramilitary forces is noteworthy. A possible reduction in the influence of the ideological religious component could be accompanied by a more pragmatic approach to foreign policy, although not necessarily a more conciliatory stance toward the West

If this scenario were to materialize, particular attention should also be paid to the potential impact of a large-scale mobilization of Kurdish Iranian militants on the ground. On the domestic front, however, the regime's repressive apparatus would likely remain largely unchanged.



Probability: 45%



Desirability: Medium. While ensuring institutional continuity, the regime could continue, in the medium term, to regard the nuclear program and ballistic missile capabilities as the core pillars of its strategic deterrence, even if both capabilities may emerge significantly weakened in the short term.

Scenario 2 - Internal Evolution of the Regime and Limited Opening to Dialogue

A second scenario envisages the medium-term emergence of more pragmatic figures within the regime who may be more willing to engage in dialogue with the international community, in a dynamic somewhat comparable to developments observed in other authoritarian contexts, such as Venezuela.

At present, however, no political actors clearly capable of playing such a role appear to be emerging.



Probability: 30%



Desirability: Medium-High. This scenario would imply a change in leadership and the formation of a government more open to international engagement, with a reduced reliance on the strategic use of the nuclear program and ballistic missile capabilities. The domestic implications would remain uncertain and could still involve restrictive conditions for the population, at least in the short to medium term.

Scenario 3 - Internal Escalation and Risk of Civil War

The third scenario involves the possibility of large-scale popular protests against the regime, driven by the expectation of achieving regime change “from below”.

The unrest is supported by Israel, potentially also in conjunction with a Kurdish armed intervention. In such circumstances, the regime could respond with widespread repression, also drawing on the support of a segment of public opinion—estimated at around 20 percent—that remains loyal to the current leadership. These dynamics could progressively open the way to an internal conflict and potentially to a civil war scenario.



Probability: 25%



Desirability: Low. A prolonged internal conflict would likely generate a significant power vacuum with broad regional repercussions, while the probability that the uprising would successfully achieve a stable regime change would remain relatively limited.

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