

POST-IRAN WAR



How Regional Players Will Shape the Strategic and Security Environment

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INTRODUCTION:

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KEY TAKEAWAYS:

The post-war regional order is unlikely to be defined by a clear case of a conventional win or loss for the combating parties, given that the evolution of this conflict has undercut preconditions for a clear-cut victory for either side.

Following the recently concluded round of talks that were convened in and mediated by Islamabad, there is at this time no formal agreement that has been reached, while the ceasefire is due to remain in place for the full fortnight. Pursuant to this, there are four likely scenarios according to which the conflict may resolve itself:

- The ceasefire either collapses or is not renewed, leading to a return to full-scale war or a possible escalation.
- The conflict resolves on terms that are favorable to the United States and Israel.
- The conflict resolves on terms that Iran deems are favorable to itself.
- The conflict remains frozen in a state of managed stalemate.



A near-term return to hostilities or escalation of the conflict is a scenario that – while it cannot be ruled out entirely – is the least likely, primarily due to the severe political, economic, infrastructural and military costs that have been absorbed not only by Iran, the United States and Israel, but also by key regional and extra-regional actors. Despite Iranian conventional capabilities having suffered serious damage, the country has shown its capacity to absorb pressure, inflict punishment and sustain against any internal pressure. A return to conflict or approach to escalation would likely feature a continued use of the Strait of Hormuz as an economic weapon, increasing use of emerging technology to offset the conventional American advantage, and continuation of proxy networks. The objective would be to make the war politically untenable for Washington. On the part of Washington, it is increasingly likely to manifest in further intensification of strikes against Iran’s civilian and military infrastructure alike, and possibly usher in a ground invasion. Given the strengthened disruption this would cause to the global energy supply and the global economy, the stakes for regional and extra-regional actors would rise dramatically.



For Pakistan, should the conflict become a long-drawn out one, things would quickly become untenable, and the posture would shift from strategic diplomacy to crisis management. The emphasis would be on activating back channels and direct lines to key actors to bring about rapid de-escalation and renewed cessation of hostilities, while continuing to offer its good offices to facilitate a mediated settlement; as well as on emergency economic contingency planning.



Given the above, it is in the interests of all actors and their allies to maintain a cessation of hostilities and not return to a repeat of the last six weeks of active conflict. The conflict, as it stands currently, is also less likely to resolve itself on terms that are cleanly favorable for either Iran or the United States. Both sides must be able to declare a victory both domestically and for an international audience, and would essentially be built around a mutually acceptable compromise.

The most likely outcome is a managed stalemate in the near-term, which eventually resolves into a settlement that is partially favorable to both sides over the next few years, but without being settled fully on either Iranian or American terms.



The conditions favoring a near-term managed stalemate include the cost to regional and global actors as discussed above, and include recognition of the fact that it is difficult for either side to achieve a maximalist position. Even with damaged infrastructure and military capabilities, and repeated attacks against its top leadership, the Iranian government's political will and authority remain intact, as does its technological capability; the surrender on terms demanded by the White House is highly unlikely to materialize. At the same time, all sides need breathing space for strategic recovery, which a stalemate provides. There is also the matter of pressure from regional and extra-regional actors, whose capacity to bear the severe economic, infrastructure and energy costs is degrading rapidly.

A near-term outcome of a managed stalemate would be framed by the Iranian leadership as standing on principle and continued resistance to American-Israeli aggression. The Strait of Hormuz will likely be managed with calibrated openings and closures that continue to enlist the support of Iran's allies while also preventing a resumption of hostilities and potential escalation. The objective would be to outlast the political timeline that keeps the Trump administration in a decisive position of power. However, over the next few years, the conflict would likely be settled on terms that are partially favorable to both primary warring parties, which each side can present as a win domestically without provoking a return to aggression and retaliation.



ROLE OF REGIONAL ACTORS:

For Pakistan, the priority would be to translate the current ceasefire facilitation and related efforts into a structured negotiation framework before the stipulated end of the ceasefire. Pakistan will be focused on institutionalizing its position as the standing venue and mediator, rather than simply a one-time convener of talks. Given the role it has played in the lead

up to and in the execution of the Islamabad talks, given the trust of the warring parties and the support of regional allies, and given the global acknowledgement of Pakistan's capacity to play this role effectively, this objective is achievable. It is also essential for Pakistan to translate the diplomatic goodwill it has accrued into economic gains which also strengthen its position domestically, possibly including securing debt-restructuring and investment commitments, IMF program flexibility, etc. This is also an opportunity for Pakistan to undercut Indian hostility towards its current success by reiterating its strategic value to concerned great powers. At the same time, Islamabad would be working to ensure that any unexpected sudden return to hostilities does not place it in an untenable position viz-a-viz its relationship with regional allies and the great powers. What is critical for the long-term is that any of the potential gains Pakistan is able to make are strong enough to survive any future changes in leaderships.



China's priority in the immediate term will be to ensure against disruption in energy flow through the Strait of Hormuz, while consolidating its role in the regional security architecture. In keeping with its policy of non-military intervention, it will likely offer any reconstructive financing support to Iran

– for energy infrastructure, telecommunications, transportation, etc. – with the expectation that the Strait of Hormuz not remain permanently closed. To that end, it would also call on Washington to restrain itself with the expectation of Chinese cooperation on global economic stability measures. Beijing would also continue to apply international pressure through multilateral forums in the near term, urging key players in the global South and the region to coalesce around a framework of responsible actor behavior – in contrast to American unilateralism against Iran. While in the long run, it may well move towards formalizing its role in the post-war region by being included in multilateral monitoring mechanisms and reconstruction governance frameworks. A role as co-guarantor along with the United States would not be unlikely.



Turkiye, having played an important role in mediating efforts, will likely seek a formalized role in any ongoing or future settlement framework, extracting institutional recognition from the process, for its role as a major regional player and not a mere peripheral actor. Turkiye’s unique value lies in its NATO membership, its functional albeit strained relationships with both Israel and Iran, and a shared border with Iran that creates immediate

security implications for it due to spillover potential. It would also be keen to play a key role in ongoing efforts in order to prevent a post-war order from emerging that potentially empowers Kurdish groups operating in the region. Gaining recognition beyond the immediate term as a Muslim majority NATO member that bridges Western concerns and regional politics in a Muslim majority region would be of value.



For the GCC countries, the priority in the near-term would be to manage the severe damage incurred during armed hostilities and find pathways to limit their dependency on external security guarantors. Over the last six weeks, these countries found themselves becoming more dependent on the US security umbrella at precisely a time when that umbrella's reliability came severely under challenge. While a focus on building indigenous defence capability would likely be a long-term outcome, in the immediate term, these countries would catalyze or strengthen efforts to diversify the umbrella beyond the US, as is already being seen in the case of the Pak-Saudi defense agreement. It is also important to note that the GCC countries

do not necessarily act as a cohesive unit, and different countries within it may take different approaches, prioritizing ending the conflict.



CONCLUSION:

What the current conflict has done is that it has accelerated evolving geopolitical alignments and strengthened the ongoing great power geostrategic competition. The US-led regional order, which prior to the war was taken for granted and viewed as difficult to challenge, appears to have become a foregone conclusion, increasingly likely to be replaced by a security architecture where regional actors have well-defined roles to play. The post-war regional order, then, would not be a new Pax Americana, a Chinese century in the Middle East, nor a clear Iranian victory. What will likely emerge is a structured multi-polarity in which no single actor dominates but where multiple actors hedge.