

Inside  
The  
Middle  
East



6/18/2026

# US – IRAN MOU

## REGIONAL PERSPECTIVES & POTENTIAL RAMIFICATIONS



A SPECIAL BRIEFING  
BY AVI MELAMED



ALLIANCEBERNSTEIN

# I SESSION AGENDA

## » FRAMING | THE ROAD TO THE WAR | THE GEOSTRATEGIC CONTEXT

WEAKNESS OF NATIONAL STATEHOOD  
RISE OF ISLAMIC IDEOLOGIES & RISE OF SEMI-STATE ENTITIES  
THE AXIS OF RESISTANCE  
IRAN'S DETERRENCE TRIANGLE  
'RING OF FIRE' & 'UNIFYING OF ARENAS' DOCTRINE

## » OCTOBER 7<sup>TH</sup> DOMINO EFFECT

THE WEAKENING OF THE AXIS OF RESISTANCE  
COLLAPSE OF 'UNIFYING OF ARENAS' STRATEGY  
2025 1<sup>ST</sup> IRAN WAR

## » 2026 2<sup>ND</sup> IRAN WAR | OPERATION 'EPIC FURY, 2026 : THE POKER GAME

A MUTUAL CHOKEHOLD  
IRAN'S PRESSURE CARDS

## » US-IRAN MOU | REGIONAL PERSPECTIVES

IRAN'S HEGEMONIC ASPIRATIONS REENERGIZED?  
FRUSTRATION AND CONCERNS  
SKEPTICISM

## » LOOKING AHEAD | POTENTIAL RAMIFICATIONS

OIL BYPASSING ROUTES AND CAPACITIES  
FORMATION OF AXES



# I SESSION AGENDA

## » FRAMING | THE ROAD TO THE WAR | THE GEOSTRATEGIC CONTEXT

WEAKNESS OF NATIONAL STATEHOOD  
RISE OF ISLAMIC IDEOLOGIES & RISE OF SEMI-STATE ENTITIES  
THE AXIS OF RESISTANCE  
IRAN'S DETERRENCE TRIANGLE  
'RING OF FIRE' & 'UNIFYING OF ARENAS' DOCTRINE

## » OCTOBER 7<sup>TH</sup> DOMINO EFFECT

THE WEAKENING OF THE AXIS OF RESISTANCE  
COLLAPSE OF 'UNIFYING OF ARENAS' STRATEGY  
2025 1<sup>ST</sup> IRAN WAR

## » 2026 2<sup>ND</sup> IRAN WAR | OPERATION 'EPIC FURY, 2026' | THE POKER GAME

A MUTUAL CHOKEHOLD  
IRAN'S PRESSURE CARDS

## » US-IRAN MOU | REGIONAL PERSPECTIVES

IRAN'S HEGEMONY ASPIRATION REENERGIZED?  
FRUSTRATION AND CONCERNS  
SKEPTICISM

## » LOOKING AHEAD | POTENTIAL RAMIFICATIONS

OIL BYPASSING ROUTES AND CAPACITIES  
FORMATION OF AXES

# THE ROAD TO THE WAR | CONJUNCTION OF 3 KEY FACTORS

- » **FAILURE OF NATIONAL STATEHOOD MODEL IN THE MIDDLE EAST**
- » **MOMENTUM OF ANCIENT AND CONTEMPORARY RADICAL IDEOLOGIES**
- » **RISE OF SEMI-STATE ENTITIES**



# THE FAILURE OF STATEHOOD IN THE ARAB WORLD



# ANCIENT POWER STRUGGLE | THE SUNNI / SHIA RIVALRY

## SUNNI = MERIT BASED

Elected for the Position,  
can be ousted.



## CALIPHATE

# A GLOBAL ISLAMIC THEOCRACY RULED BY SHARIAH LAW

## SHIA = BLOODLINE

Descendant of 4<sup>th</sup> Caliph Ali,  
Empowered by Divine source.



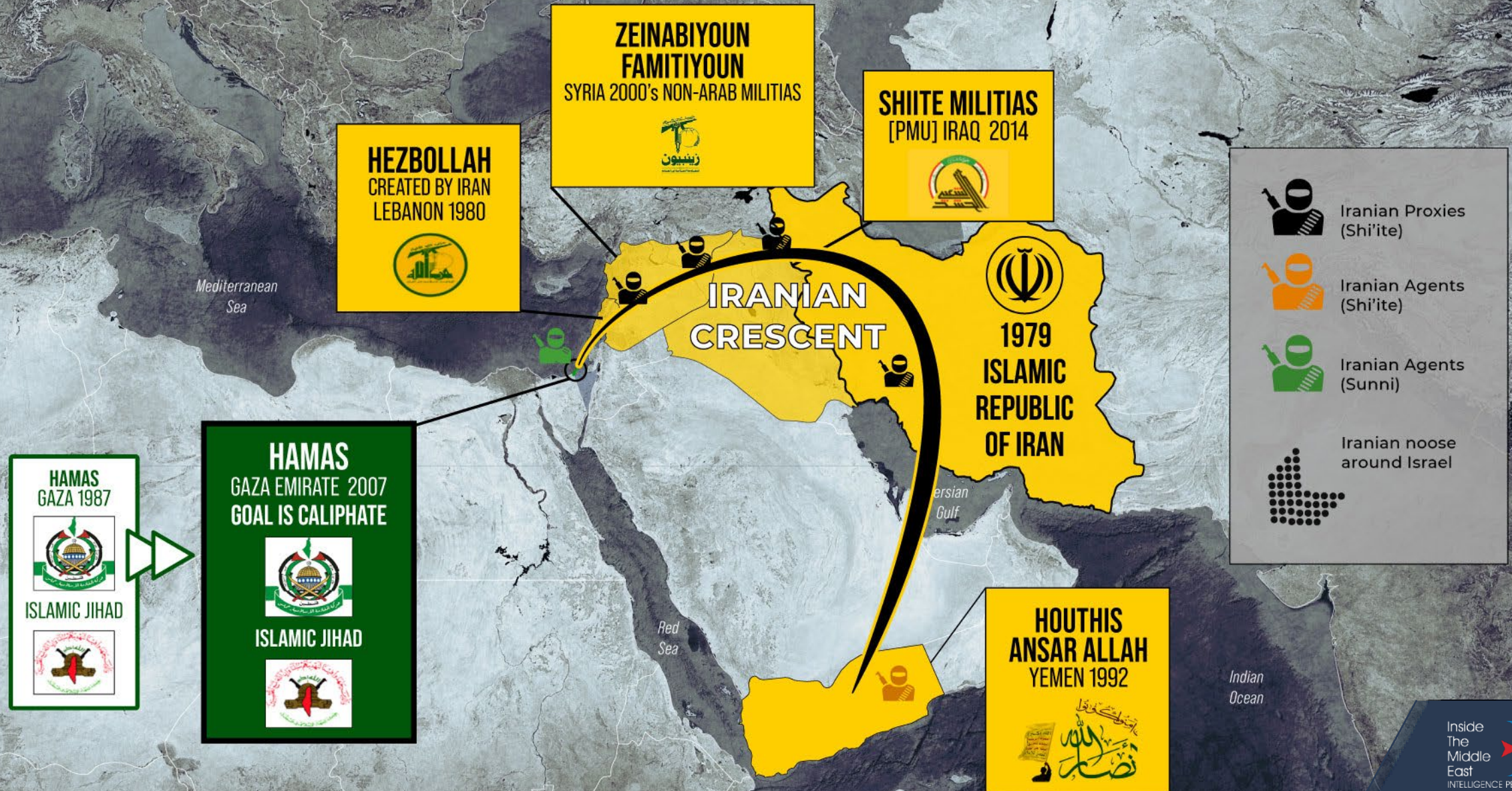
## IMMAMATE



- ❑ ANTI WESTERN VALUES
- ❑ ERADICATING WESTERN INFLUENCE IN THE MIDDLE EAST
- ❑ UNRELENTING STRUGGLE AGAINST ISRAEL UNTIL IT IS ANNIHILATED
- ❑ “LIBERATING PALESTINE”



# SEMI-STATE ENTITIES | THE IRANIAN-BACKED 'AXIS OF RESISTANCE'



# IRAN'S TRIANGLE OF DETERRENCE (PROXIES, MISSILES/DRONES, NUCLEAR)

## NUCLEAR PROGRAM



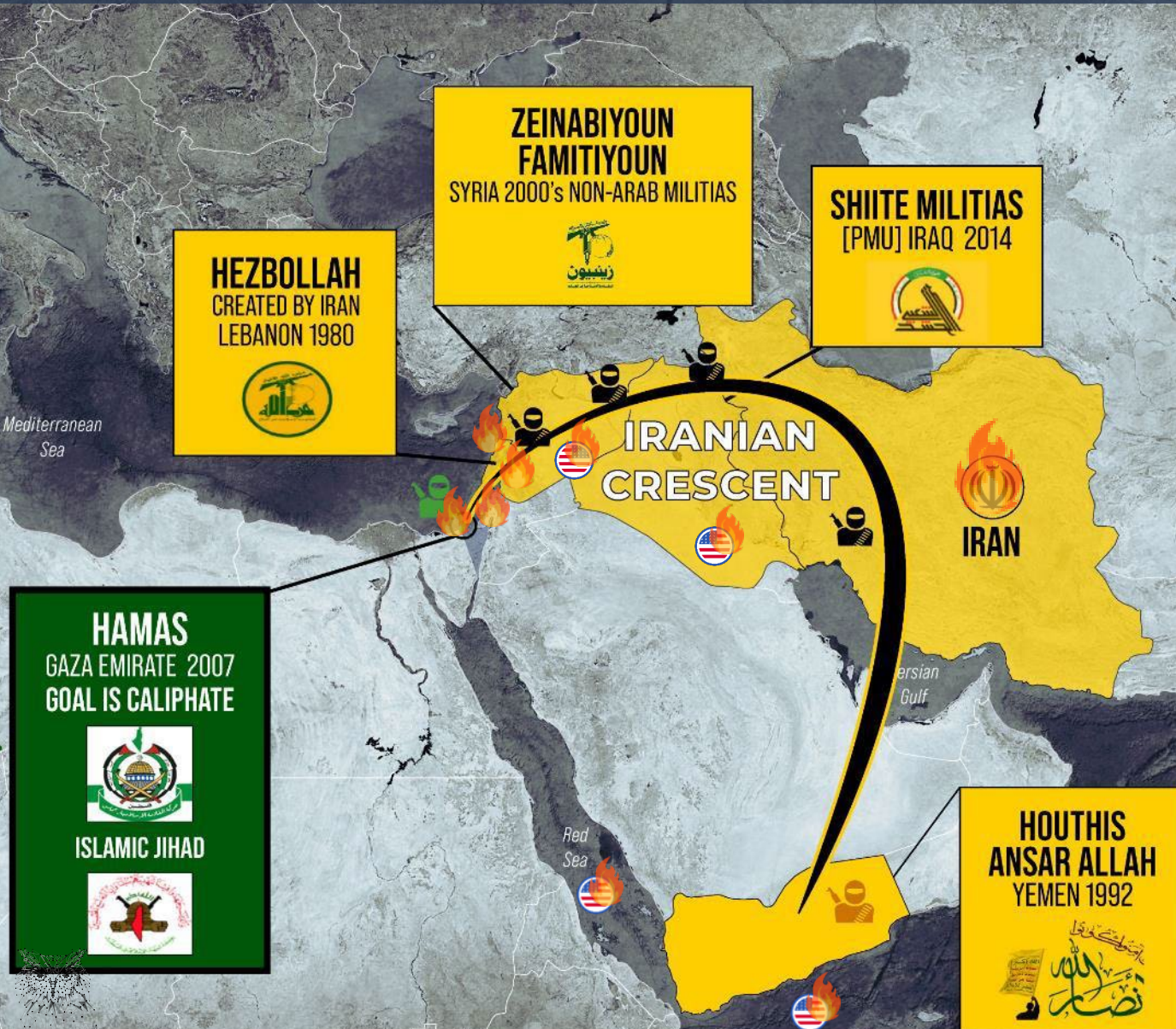
## PROXY MILITIAS



## MISSILES & DRONES



# ELIMINATING ISRAEL | 'RING OF FIRE' & THE 'UNIFYING OF ARENAS' DOCTRINE



- » **EXHAUST ISRAEL THROUGH REPEATED MILITARY ROUNDS LAUNCHED FROM GAZA**  
(2008-2009; 2012; 2014; 2018; 2019; 2021; 2023 – Now)  
= Thousands Dead & Injured + Millions Traumatized
- » **TARGET ISRAEL'S SOFT BELLY - Civilians**
- » **"RING OF FIRE" Build Massive Military Infrastructure In Areas Bordering Israel**
- » **"UNIFYING OF ARENAS" Launch Simultaneous War From All Arenas To Eliminate Israel**

# I SESSION AGENDA

## » FRAMING | THE ROAD TO THE WAR – GEOSTRATEGIC CONTEXT

WEAKNESS OF NATIONAL STATEHOOD  
RISE OF ISLAMIC IDEOLOGIES & RISE OF SEMI-STATE ENTITIES  
THE AXIS OF RESISTANCE  
IRAN'S DETERRENCE TRIANGLE  
'RING OF FIRE' & 'UNIFYING OF ARENAS' DOCTRINE

## » OCTOBER 7<sup>TH</sup> DOMINO EFFECT

THE WEAKENING OF THE AXIS OF RESISTANCE  
COLLAPSE OF 'UNIFYING OF ARENAS' STRATEGY  
2025 1<sup>ST</sup> IRAN WAR

## » 2026 2<sup>ND</sup> IRAN WAR | OPERATION 'EPIC FURY, 2026 : THE POKER GAME

A MUTUAL CHOKEHOLD  
IRAN'S PRESSURE CARDS

## » US-IRAN MOU | REGIONAL PERSPECTIVES

IRAN'S HEGEMONY ASPIRATION REENERGIZED ?  
FRUSTRATION AND CONCERNS  
SKEPTICISM

## » LOOKING AHEAD | POTENTIAL RAMIFICATIONS

OIL BYPASSING ROUTES AND CAPACITIES  
FORMATION OF AXES




# OCTOBER 7 DOMINO EFFECT



# DOMINO EFFECT OF OCTOBER 7 | DEFEAT OF AXIS OF RESISTANCE



**LEBANON  
HEZBOLLAH**



**DEFEATED  
NOVEMBER 2024**

**SYRIA  
ASSAD**



**REGIME FALL  
DECEMBER  
2024**

**IRAQ  
SHIITE MILITIAS  
SUSPEND ATTACKS**



**IRAN  
DEFEATED  
JUNE 2025**



**GAZA  
HAMAS**



**RULE WEAKENS**

**YEMEN**



# I SESSION AGENDA

## » FRAMING | THE ROAD TO THE WAR – GEOSTRATEGIC CONTEXT

WEAKNESS OF NATIONAL STATEHOOD  
RISE OF ISLAMIC IDEOLOGIES & RISE OF SEMI-STATE ENTITIES  
THE AXIS OF RESISTANCE  
IRAN'S DETERRENCE TRIANGLE  
'RING OF FIRE' & 'UNIFYING OF ARENAS' DOCTRINE

## » OCTOBER 7<sup>TH</sup> DOMINO EFFECT

THE WEAKENING OF THE AXIS OF RESISTANCE  
COLLAPSE OF 'UNIFYING OF ARENAS' STRATEGY  
2025 11<sup>ST</sup> IRAN WAR

## » 2026 2<sup>ND</sup> IRAN WAR | OPERATION 'EPIC FURY, 2026 | THE POKER GAME

A MUTUAL CHOKEHOLD  
IRAN'S PRESSURE CARDS

## » US-IRAN MOU | REGIONAL PERSPECTIVES

IRAN'S HEGEMONY ASPIRATION REENERGIZED ?  
FRUSTRATION AND CONCERNS  
SKEPTICISM

## » LOOKING AHEAD | POTENTIAL RAMIFICATIONS

OIL BYPASSING ROUTES AND CAPACITIES  
FORMATION OF AXES

# 2<sup>ND</sup> IRAN WAR | OPERATION 'EPIC FURY' | THE POKER GAME





- »» Clear strategic objective
- »» Pressure cards (global economy, Western public opinion, the World Cup)
- »» Inner-Arab frictions, competing goals, and interests
- »» Differing priorities of the United States & Israel



# 2ND IRAN WAR | JUNE 2026 | A MUTUAL CHOKEHOLD

الوضع شائك ..  
وغير متماثل!  
كله ماسك  
في ماسك!  
لكن إيران تبدو  
الأكثر سيطرة!



“All sides are exerting pressure on one another, but Iran appears to be the party in control”

~ Cartoon by Palestinian –  
Jordanian editorial  
Cartoonist, Emad Hajjaj

# SESSION AGENDA

## » FRAMING | THE ROAD TO THE WAR – GEOSTRATEGIC CONTEXT

WEAKNESS OF NATIONAL STATEHOOD  
RISE OF ISLAMIC IDEOLOGIES & RISE OF SEMI-STATE ENTITIES  
THE AXIS OF RESISTANCE  
IRAN'S DETERRENCE TRIANGLE  
'RING OF FIRE' & 'UNIFYING OF ARENAS' DOCTRINE

## » OCTOBER 7<sup>TH</sup> DOMINO EFFECT

THE WEAKENING OF THE AXIS OF RESISTANCE  
COLLAPSE OF 'UNIFYING OF ARENAS' STRATEGY  
2025 IRAN'S 1<sup>ST</sup> WAR

## » 2026 2<sup>ND</sup> IRAN WAR | OPERATION 'EPIC FURY, 2026 : THE POKER GAME

A MUTUAL CHOKEHOLD  
IRAN'S PRESSURE CARDS

## » US-IRAN MOU | REGIONAL PERSPECTIVES

IRAN'S HEGEMONIC ASPIRATION REENERGIZED?  
FRUSTRATION AND CONCERNS  
SKEPTICISM

## » LOOKING AHEAD | POTENTIAL RAMIFICATIONS

OIL BYPASSING ROUTES AND CAPACITIES  
FORMATION OF AXES

# IRAN'S HEGEMONIC ASPIRATIONS REENERGIZED?

- ›› **Deterrence Triangle** still exists
- ›› Iran feels **emboldened** to wield its dominance over the **Hormuz Strait**
- ›› Might **resume** its '**Unifying of the Arenas**' doctrine
- ›› The **ideological triumph** of the concept of the "**Resistance**" and validating its underlying claim that the **West is weak and crumbles**

*"The resilience of the Resistance camp exceeds that of the West. Allowing it to endure prolonged struggles and portray mere survival as a strategic achievement." ~ **Feras Abu Hilal, Palestinian Journalist***



# IRAN'S PROXY POSTURE | REGROUP & EMBOLDENED



**HEZBOLLAH  
REGROUPS**




**IRAQI SHIITE MILITIAS  
ON THE SIDE LINES**

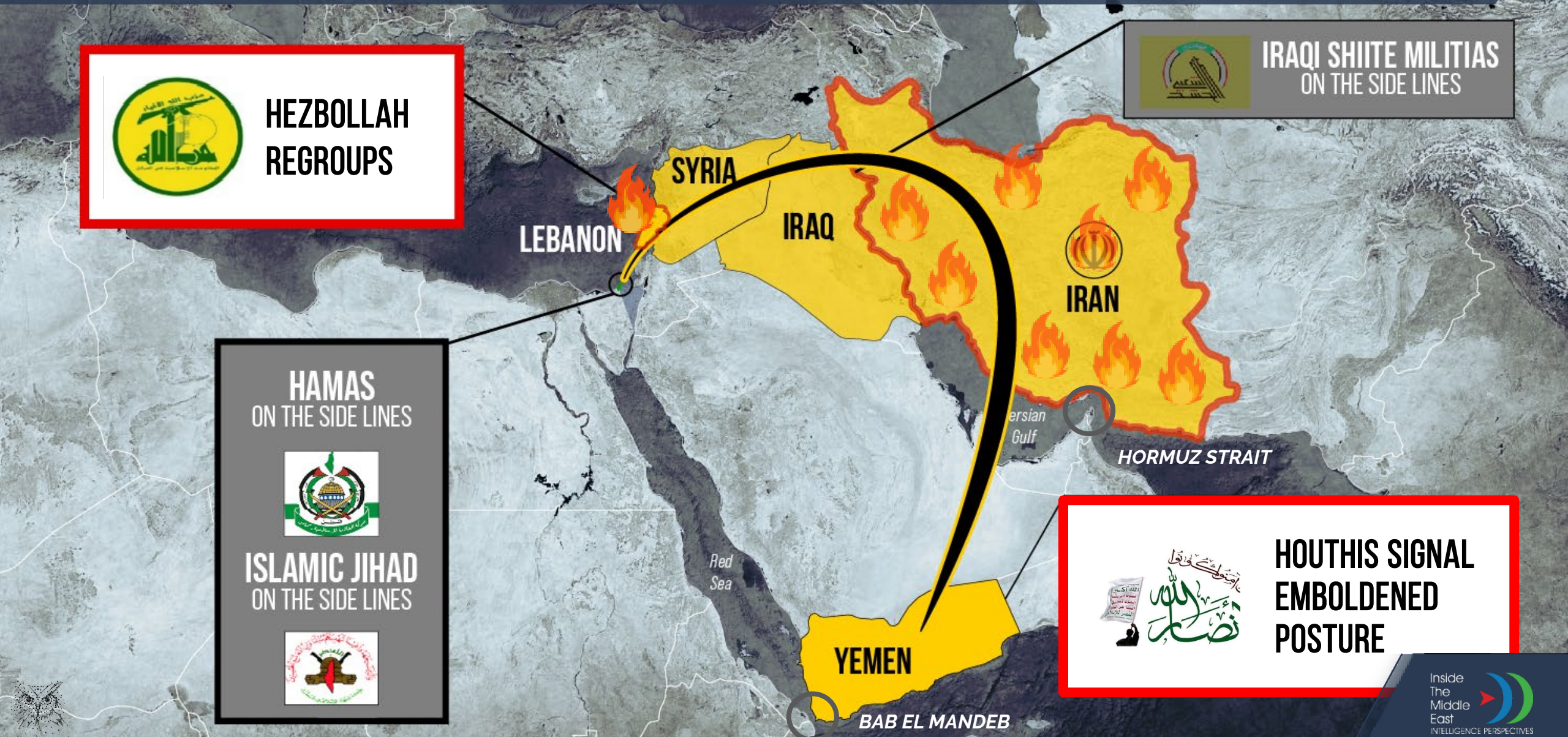
**HAMAS  
ON THE SIDE LINES**



**ISLAMIC JIHAD  
ON THE SIDE LINES**



**HOUTHIS SIGNAL  
EMBOLDENED  
POSTURE**



# US-IRAN MOU | REGIONAL REACTIONS | FRUSTRATION & CONCERN

- » The war could - and should have - been the **final nail** in the coffin of Iran's hegemonic project. The outcome of the war - as of now - might reenergize Iran's aspirations.
- » Both **Israel & Arab countries are concerned** with the possibility of a **backwind for Iran's proxies** - Hezbollah, Hezbollah, IJIP (Islamic Jihad in Palestine - the 2<sup>nd</sup> largest power in Gaza), and the emboldening of the Houthis aggression.

*'No state succeeded in establishing as broad a sphere of influence across the Arab world—through both hard and soft power—as Iran did over the course of three decades, until the events of October 7, 2023.'* **Abd al Rahman al Rashed, Veteran Saudi Journalist & Chair Al, Arabiya's Editorial Board**

- » The MOU further emphasizes the **regional narrative** (particularly in the discourse in the Arab world) that the United States is **not** a reliable ally.



# USA – IRAN MOU | REGIONAL SKEPTICISM



## “The US-IRAN TRUCE”

Cartoon by Egyptian cartoonist, Abd al-Halim

*“Both sides are presenting divergent interpretations of the interim agreement.” ~ **Abd al-Aziz al-Khamis, Saudi Journalist***

*“The cease-fire is a prelude for the next round. And it will be more severe.” ~ **Nadim Koteich, Lebanese Journalist***

*“The success of the MOU is highly questionable given that it addresses only half of the issues at stake. Each side presents only part of the truth. And each side interprets the agreement through its own lens.” ~ **Sameh Rashed, Egyptian Journalist***



# I SESSION AGENDA

## » FRAMING | THE ROAD TO THE WAR – GEOSTRATEGIC CONTEXT

WEAKNESS OF NATIONAL STATEHOOD  
RISE OF ISLAMIC IDEOLOGIES & RISE OF SEMI-STATE ENTITIES  
THE AXIS OF RESISTANCE  
IRAN'S DETERRENCE TRIANGLE  
'RING OF FIRE' & 'UNIFYING OF ARENAS' DOCTRINE

## » OCTOBER 7<sup>TH</sup> DOMINO EFFECT

THE WEAKENING OF THE AXIS OF RESISTANCE  
COLLAPSE OF 'UNIFYING OF ARENAS' STRATEGY  
2025 IRAN'S 1<sup>ST</sup> WAR

## » 2026 2<sup>ND</sup> IRAN WAR | OPERATION 'EPIC FURY, 2026 : THE POKER GAME

A MUTUAL CHOKEHOLD  
IRAN'S PRESSURE CARDS

## » US-IRAN MOU | REGIONAL PERSPECTIVES

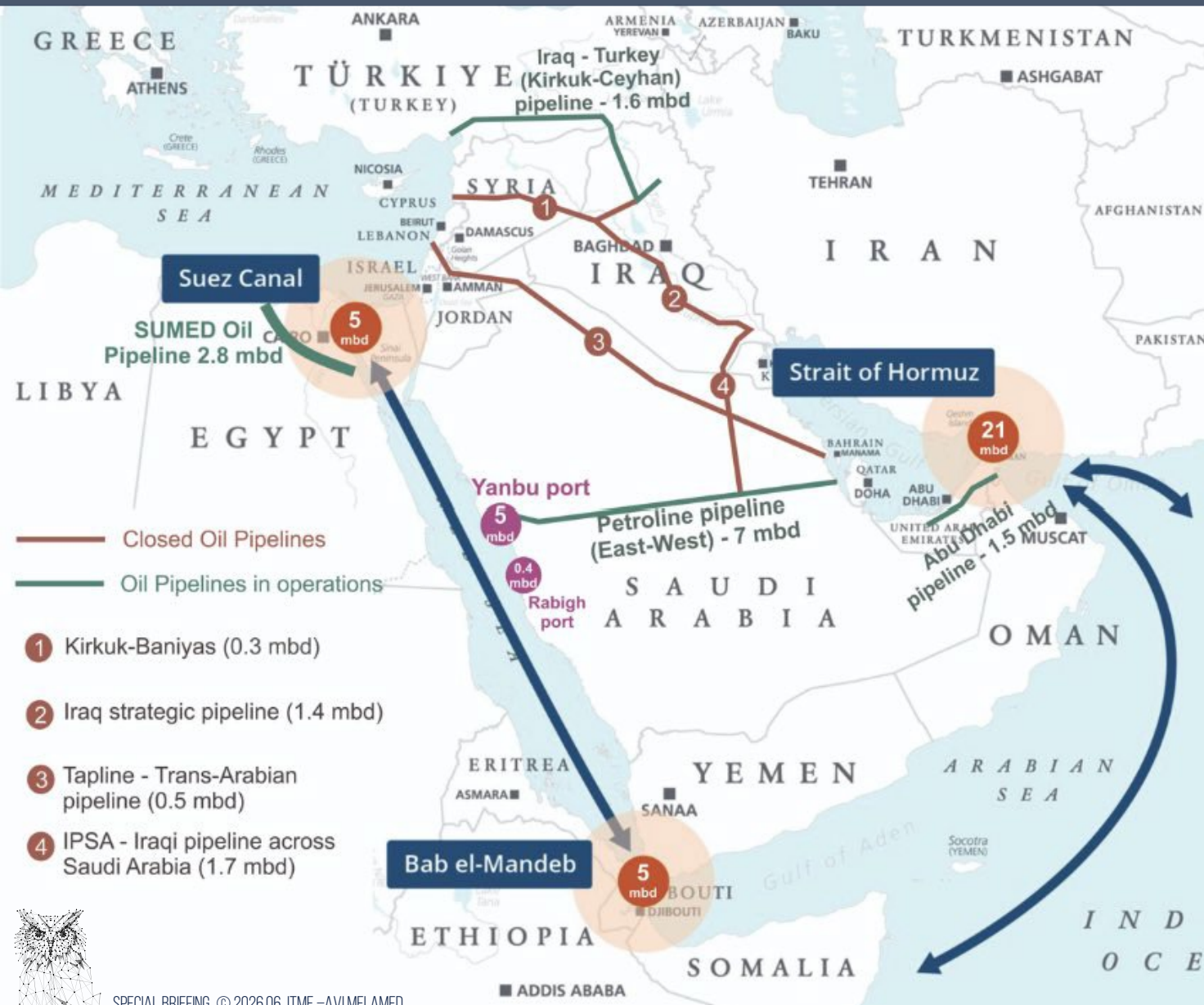
IRAN'S HEGEMONIC ASPIRATION REENERGIZED?  
FRUSTRATION AND CONCERNS  
SKEPTICISM

## » LOOKING AHEAD | POTENTIAL RAMIFICATIONS

OIL BYPASSING ROUTES AND CAPACITIES  
FORMATION OF AXES



# BYPASSING OIL ROUTES AND CAPACITIES



» **Current Alternative Export Routes.** Existing bypass routes currently allow the shipment of 6 – 7 million barrels of oil per day. This represents roughly 30% of the volume that normally transits through the Strait of Hormuz.

» **Planned Capacity Expansion.** The UAE & Saudi Arabia are investing in infrastructure designed to further reduce reliance on the Hormuz Strait. Within the next 5 years, these projects are expected to add an additional 20% to the volume of oil that currently passes through the Strait of Hormuz.

(Data by: IAE, @Kpler)



# REGIONAL RESTRUCTURE

- ») Formation of a **Sunni Axis** of **Turkey-Saudi Arabia-Pakistan** (with Lebanon, Syria and Jordan under its umbrella) to counter possible resumption of Iran's hegemonic vision
- ») Strengthening of **India-UAE-Israel Axis**
- ») A **conjunction of interests** between **Israel and the Sunni Axis** regarding **Gaza & Lebanon** could further advance current process in Lebanon and Gaza Strip towards:
  - Establishing **Lebanon's sovereignty** and ending Hezbollah's ability to dictate its - and Iran's - agenda
  - **Inner-Palestinian reconciliation between Fatah / Palestinian Authority and Hamas** resulting in curbing Hamas & IJIP's ability to dictate their - and Iran's - agenda
- ») Upcoming elections in Israel and a **likely governmental transition** could reshape diplomatic and political dynamics.



**TO UNDERSTAND ISRAEL & THE ISRAELI-PALESTINIAN CONFLICT  
WE MUST UNDERSTAND THE MIDDLE EAST**

**WWW.INSIDETHEMIDDLE-EAST.COM**



# ITME FELLOWSHIP ||| VOICES FROM THE MIDDLE EAST ABOUT THE MIDDLE EAST



**INTERESTED? CONTACT US TO APPLY FOR THE NEXT FELLOWSHIP!**



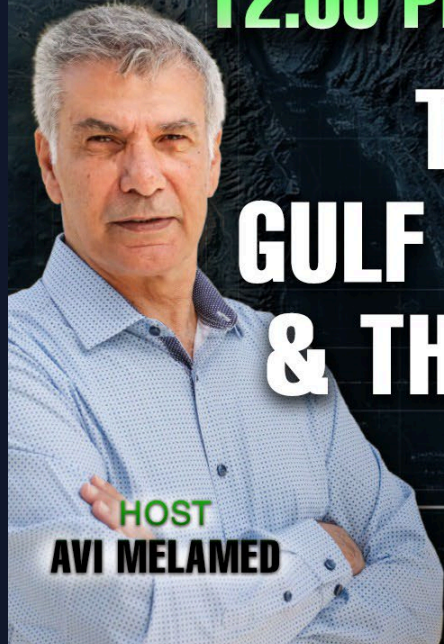
THE  
**BRIEFING ROOM**

FROM THE REGION | ABOUT THE REGION

من المنطقة | عن المنطقة | من المنطقة | عن المنطقة

**JUNE 21**  
**12:00 PM EASTERN**

**THE**  
**GULF STATES**  
**& THE WAR**



**HOST**  
**AVI MELAMED**



**GUEST**  
**ABDULAZIZ AL-KHAMIS**

**JOIN US**  **INTERVIEW + Q & A**

**NEXT ITME BRIEFING ROOM Hosted by Avi Melamed**

**The Gulf States and the War | Context. Interests. Implications.**

Join us for a special conversation with Abdulaziz Al-Khamis, a Saudi journalist, researcher, political analyst, and host on Sky News Arabia.

Al-Khamis is a respected voice on Gulf affairs, regional politics, Islamic movements, and the rapidly evolving dynamics shaping the Middle East. As the region responds to the ongoing war and shifting geopolitical realities, Al-Khamis will provide valuable insight into how the Gulf States view the conflict, their strategic interests, and the broader implications for the Middle East.

For information and to register:

<https://insidethemiddle-east.com/briefing-room-inside-the-middle-east/>