

If Tehran Survives: The IRGC Republic As the Gulf's Permanent Crisis





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I. Introduction

Three weeks into Operation Epic Fury, it becomes clearer the campaign has been devastating by any historical standard of sustained air operations: more than seventy percent of Iran's ballistic missile launchers neutralized, the enrichment infrastructure at Natanz further degraded and Fordow rendered inoperable, the naval capacity to threaten commercial shipping functionally eliminated, and the defense industrial base targeted with a systematic thoroughness designed to impose years-long reconstitution timelines.¹ Ayatollah Ali Khamenei is dead, and the upper tier of the Islamic Revolutionary Guard Corps (IRGC) command—the defense minister, the IRGC commander, and the secretary of the Supreme National Security Council among them—has been killed in the same campaign.² What Epic Fury has not, yet, accomplished is regime collapse.

The Islamic Republic has not fallen, and it is important to consider the possible consequences of an enduring, if severely degraded, one. Partial military success is unlikely to result in either any sort of agreement with the United States, either a Venezuela-like implicit understanding or an overt Joint Comprehensive Plan of Action (JCPOA)-like deal. Instead, it will likely yield an IRGC-dominated, humiliation-driven republic whose survival logic points toward nuclear reconstitution. This would produce a more structurally dangerous regional order with costs that distribute unevenly across the region: an accelerated Saudi proliferation timeline accelerated; an Emirati stability premium repriced in ways that the United Arab Emirates' (U.A.E.) economy cannot fully absorb; a Qatari liquefied natural gas (LNG) risk environment whose fragility European buyers have not priced into their long-term supply assumptions; and a deepening of Chinese diplomatic leverage that inconclusive American military action will have produced the conditions for.

II. The Transformation

The election of Mojtaba Khamenei as supreme leader on March 8 is the most analytically significant data point about the trajectory of the regime.³ The IRGC engineered his succession, convening the Assembly of Experts in a secret undisclosed location after its hall in Qom was bombed, bludgeoning aside reformist and pragmatist objections, and ensuring that members who might have resisted were either unable to attend or unwilling to register opposition.⁴ The appointment was delayed by hours likely because sufficient coercion of the assembly's recalcitrant members required time—which is to say, the entire constitutional mechanism of the Islamic Republic's succession was reduced to the management of internal resistance within the IRGC's own institutional subordinates.

This transformation is likely to prove to be a major doctrinal shift. The Islamic Republic was founded on Khomeini's invention of supreme clerical guardianship as the organizing principle of the Shia Islamist state. The doctrine held that legitimate political authority in the absence of the mythic figure of the Hidden Imam belongs to the most qualified jurist, whose religious learning and moral authority supersede those of any military or political institution. It was this principle that gave the supreme leader his position above the IRGC as a theological superior, not a competing power center. The late Khamenei, for all his role in generating the conditions that produced this war, retained that authority. He could authorize and restrain,

legitimate and withhold legitimation, because his office carried a claim that derived from jurisprudence rather than from force.

Mojtaba carries none of this power. His elevation was an act of institutional self-authorization by the IRGC, and no amount of post-facto clerical endorsement can obscure that the theological foundation of the office has been subordinated to the military institution that now requires it as a facade. A supreme leader whose authority derives from the IRGC rather than from independent clerical standing is not a jurist-guardian in the founder's sense—he is a figurehead performing the role that the doctrine requires while the institution that installed him governs in fact.⁵

The implication is that a surviving Islamic Republic would have quietly ceased to be a Shia Islamist state in the doctrinal sense and become something closer to what Sunni Islamist movements have long been: an organization with a military wing and a political wing whose ideological output serves organizational survival through escalated narratives of victimhood and martyrdom. Hamas has a political bureau and a military wing; the Muslim Brotherhood has its parliamentary operations and its organizational network.⁶ Neither requires a supreme jurist whose religious authority constitutes the ultimate source of legitimacy. The IRGC-republic, stripped of a functional jurist, would operate on the same principle governed by militant institutional interests rather than by the doctrinal framework Khomeini constructed to distinguish Shia political theology from every other form of Islamist politics.

III. IRGC Survival, Gulf Instability

There is no reason to assume a sufficiently degraded Iran will behave like a sufficiently degraded Iraq after 1991, seeking relief through compliance rather than vindication through resistance. This is a regime whose new supreme leader derives his authority entirely from the IRGC's wartime consolidation, and whose institutional survival is now predicated on the narrative that the Islamic Republic was attacked without provocation and remains, in its martyrdom, the vanguard of resistance against American-Zionist aggression.

Regimes organized around martyrdom and revenge cannot moderate without dissolving. A regime that acquiesces to the new regional security architecture that Epic Fury has imposed would be removing the sole basis of its own legitimacy—a legitimacy derived entirely from the war's humiliation and from the promise of ultimate vindication that humiliation generates. The IRGC will likely conclude that accommodation is not a policy option available to them without triggering the internal collapse that external military pressure has failed to produce. The operative constraint on Iranian behavior is therefore not just the military degradation the campaign has inflicted but the institutional transformation that degradation has produced. A wounded, humiliated, IRGC-governed Iran is not an Iran that accommodation can reach.

The precedent for what a regime in this position does is not comforting. Hamas after 2007, besieged, isolated, stripped of regional leverage, with no moderating institutional voice left after the military wing won every internal argument, spent seventeen years assembling the conditions for a catastrophic bet

rather than accepting organizational slow death. A surviving IRGC-Iran meets the same conditions at an order of magnitude that makes the comparison more alarming rather than instructive.

The administration may have anticipated a Venezuelan outcome: decapitate the leadership, and surviving elements calculate that accommodation is cheaper than resistance and rush towards an agreement with the U.S.⁷ In Caracas, that calculus produced a transactional offer within days of Maduro's capture, because the surviving faction held interests separable from the removed leader and could offer Washington something tangible without dissolving their own institutional position. Should the IRGC survive Epic Fury as a governing institution rather than scatter into competing factions, no equivalent transaction would be available because the IRGC's authority would rest entirely on a legitimacy claim that the transaction itself would destroy.

IV. The Gulf Under Permanently Hostile Iran

The lesson a surviving regime would draw from Epic Fury is logically inescapable: Qaddafi disarmed and was killed; Kim did not disarm and is untouchable. The military destruction of Iran's enrichment infrastructure has not removed the nuclear option from the strategic calculation of the IRGC but has elevated it to the only option that resolves the fundamental security dilemma the Republic now faces. Reconstitution of enrichment capacity in hardened, dispersed underground facilities over five to seven years, culminating in a deterrent that discontinuously transforms the entire risk architecture, is not a marginal risk but the strategically mandated response to a campaign whose lesson, from the regime's perspective, is that the only shield against further American-Israeli action is a weapon that makes its cost prohibitive. Unburdened by the late Khamenei's strategic patience, and with conventional deterrence functionally eliminated, the IRGC would pursue that shield while simultaneously pivoting to asymmetric pressure in the Gulf to demonstrate that residual deterrence survives.

Under such conditions, Saudi Arabia's position becomes the most visibly incoherent, and over the medium term, the most consequential. The war forced Saudi Crown Prince Mohammed bin Salman (MbS) to absorb the implicit logic of American-Israeli military operations that Riyadh had neither sought nor designed, and to accept the temporary solidarity with Abu Dhabi that his Yemen campaign had been systematically dismantling. The IRGC's surviving capacity for proxy activation in the Eastern Province, Bahrain, and Yemen adds a dimension of vulnerability to the intra-Gulf competition that was already the central axis of regional politics before Epic Fury. Vision 2030 is a capital-attraction proposition predicated on presenting Saudi Arabia as a stable hub in a normalizing regional environment—a proposition fundamentally compromised by the permanent presence of a hostile, IRGC-governed Iran on the other side of the Gulf. Foreign direct investment into the kingdom's non-oil sectors, sovereign borrowing for the Saudi Public Investment Fund's infrastructure ambitions, and the insurance and logistics costs associated with operating in a region where Iranian retaliation is now a permanent underwritten assumption rather than a calculable contingency each carry a political risk premium that compresses just as Vision 2030 requires the most favorable capital environment it can attract.

The nuclear dimension, however, is where Saudi exposure becomes existential. MbS has stated, publicly and on multiple occasions, that Saudi Arabia will develop nuclear capability if Iran does.⁸ American

extended deterrence commitments, however formally constituted, cannot fully substitute for sovereign capability in the Saudi political calculus, for the precise reason that the same campaign that degraded Iran demonstrated the limits of American strategic patience with regional entanglements. If Washington's commitment was sufficient to launch Epic Fury, it is not necessarily sufficient to absorb the domestic political costs of nuclear use in a second Iranian crisis a decade hence. Riyadh's insurance against that calculation gap is its own weapons program.

The implication is a Gulf nuclear dynamic that Epic Fury, in case it failed to produce a regime change, has made more likely rather than less. A surviving IRGC-Iran on a nuclear reconstitution timeline of five to seven years is also a countdown for Saudi proliferation decisions that, once initiated, cannot be reversed, and which will have cascading effects regionally and globally likely marking the end of the non-proliferation regime.

The U.A.E.'s exposure is different because the Emirati model depends less on commodity production than on the monetization of stability. Dubai functions as an entrepôt, financial center, and logistics hub on the assumption that it offers a more predictable operating environment than the alternatives around it. That comparative advantage is not abolished by war, but it can be narrowed. A surviving hostile Iran, particularly one that has demonstrated both the willingness and the capability to threaten Gulf shipping and critical infrastructure, would make it harder for the Emirates to recover the full stability premium on which that model rests.

The issue is not simply the temporary increase in war-risk premiums during active hostilities. Markets can absorb price shocks when they are understood as exceptional. The deeper problem arises when insurers, shippers, lenders, and corporate planners begin to treat disruption in and around Hormuz not as a rare contingency but as a recurrent feature of the operating environment. In that scenario, higher insurance costs, more conservative underwriting, longer planning buffers, and a wider regional risk discount would not disappear immediately when the fighting stops. They would linger to the extent that the surviving Iranian regime retains both the incentive and the residual capacity to reopen the crisis at a time of its choosing.

That matters for the U.A.E. because its advantage is reputational as much as physical. Abu Dhabi and Dubai do not need to become unsafe in absolute terms to incur strategic cost; they need only to become less predictably insulated than they were before the war. Even a modest but durable repricing of Gulf transit risk would raise costs across shipping, port operations, trade finance, and investment planning. A collapsed Iran would produce disorder, which is dangerous but potentially temporary and eventually legible to markets. A surviving IRGC-dominated Iran would pose a different problem: the persistence of a strategic actor capable of periodically reintroducing uncertainty into the Gulf's core commercial arteries. For the U.A.E., that would mean the structural erosion of the stability premium that has underwritten its regional position.

Qatar's bind may be the tightest of the three Gulf cases. The war has simultaneously weakened the Iranian hedge that long gave Doha room for maneuver vis-à-vis Saudi Arabia and exposed the physical vulnerability of Ras Laffan, the infrastructure on which Qatar's economic model disproportionately rests. The central problem is that Qatar's model becomes materially more fragile and more expensive to sustain. European buyers turned to Qatari LNG as part of post-Russia diversification on the assumption that long-term supply from Ras Laffan rested on a broadly manageable risk environment. A surviving hostile Iran, especially one that has already shown willingness to strike high-value Gulf infrastructure, weakens that assumption. Insurance, reinsurance, financing, and contractual risk allocation would all be repriced upward if purchasers conclude that future disruptions are no longer tail events but recurring possibilities. The immediate price spike after the production disruption showed how sensitive gas markets remain to Qatari supply. The longer-term issue is subtler. Even if production resumes and contracts formally remain in place, repeated exposure to war-risk repricing could gradually impair Qatar's commercial position by raising delivery costs, increasing hedging burdens, and encouraging some buyers to diversify more aggressively across suppliers and routes.⁹ That would not eliminate Qatar's role in global LNG markets. It would, however, structurally impair the low-risk, high-reliability premium on which the present model depends. In that sense, a surviving IRGC-dominated Iran would make Qatar's position persistently more vulnerable, more expensive, and strategically less autonomous than it was before the war.

The economic vulnerabilities Epic Fury has exposed across all three Gulf actors would not go unnoticed in Beijing—and China's response to them would reshape the regional order as consequentially as the campaign itself.

V. China

A surviving IRGC-Iran also creates the conditions under which Gulf states rationally diversify their security relationships in directions that erode the regional architecture the campaign was partly designed to consolidate. The United States can punish Iran; it cannot moderate it. China can exercise the leverage of a patron whose economic lifeline Tehran cannot afford to forfeit and whose diplomatic channel remains the only one the IRGC-republic is capable of using.

Beijing enters the post-campaign environment holding competing interests that a surviving IRGC-Iran simultaneously exacerbates and makes it more expensive to manage. The gray-market oil discount that a garrison-state Iran offers Chinese refiners is a real economic benefit; the permanent repricing of Hormuz war risk and the demonstrated IRGC willingness to strike Ras Laffan-scale infrastructure threatens the Gulf supply chain from which China draws at volumes that dwarf Iranian capacity. Beijing is simultaneously Iran's most important economic patron and the power with the most to lose from the erratic IRGC behavior that Iranian desperation now produces. This is not merely a contradiction but a dual exposure China must manage, and the management cost rises with every escalatory action the IRGC takes in the Gulf. Russia has no equivalent restraining interest. Moscow's strategic calculus runs in the opposite direction, because a permanent Iranian spoiler in the Gulf divides American attention, raises energy price floors, and secures a client whose desperation makes it a more reliable military-technology exchange partner than a stronger Iran would be. The divergence between Russian and Chinese interests in post-Epic

Fury Iran is therefore itself a feature of the new regional environment, and one that Gulf states will have every incentive to exploit.

The Gulf states understand China's exposure and will exploit it. The triangular dynamic that now governs Gulf security politics runs as follows: Riyadh and Abu Dhabi use the deepening American security umbrella to incentivize Chinese restraint of Iran, while simultaneously using the Beijing channel to signal to Washington that American over-commitment to Israeli military objectives without a political resolution creates space for Chinese diplomatic penetration that American influence cannot fill. MbS has been running a version of this play since the Abraham Accords began repricing Saudi strategic options; a non-conclusive Epic Fury raises the stakes without changing the fundamental logic. The kingdom's interest is not in choosing between Washington and Beijing but in ensuring that competition between them generates maximum security and economic returns for Riyadh which means that a surviving IRGC-Iran, as the permanent justification for both American security provision and Chinese diplomatic management, can be, in theory and if well utilized, an asset for Saudi leverage over both great powers simultaneously. The American strategic cost of this dynamic is the uncomfortable conclusion the operation's partial success underwrites. A surviving IRGC-Iran does not merely leave a wounded adversary in the field but also drives Gulf states toward Beijing as indispensable interlocutor for restraining IRGC behavior. Military success and geopolitical consolidation are not the same objective, and in the Gulf as currently constituted, the former may be the precondition for the partial failure of the latter.¹⁰

VI. The Strategic Implication

The operation's stated objectives have been framed as the elimination of Iran's military and nuclear threat capacity. That addresses current capability rather than future intent, and it is future intent operating inside a transformed institutional structure that will govern Gulf stability over the decade following the campaign's endpoint.

A surviving IRGC-Iran would exit this war with the inescapable lesson that the only deterrent that would have prevented it is the one it does not yet possess. Riyadh would draw the same lesson in mirror image. The nuclear reconstitution timeline in Tehran and the proliferation decision timeline in Riyadh would run in parallel, each accelerating the other. The Gulf nuclear architecture Epic Fury leaves behind may prove to be the precondition for a two-program deterrence race that neither American security guarantees nor Chinese diplomatic management could arrest once initiated.

The Gulf economies would suffer greatly from the new situation. Gulf economies rest on assumptions about the regional operating environment that a surviving IRGC-Iran would permanently reprice. Insurance floors would not normalize, sovereign borrowing costs would carry a persistent conflict premium, and the investment narratives on which all different Gulf development models depend would require a political horizon that a wounded, revenge-organized regime could not allow to form.

The operation would have removed the short-term threat without resolving the condition that produces the long-term one—leaving behind a regime organized around the promise of ultimate vindication,

pursuing the only deterrent the past weeks had made strategically undeniable, inside a regional environment where its survival had simultaneously accelerated Gulf proliferation decisions, fragmented its proxy network, and created structural conditions for Chinese diplomatic penetration of a Gulf order that American military action consolidated but could not alone sustain.

There are many signs that Gulf Cooperation Council (GCC) countries have reversed their positions and are now reaching the same conclusions about the unviability of a long-term IRGC threat.

Before Epic Fury, the GCC states we committed practitioners of strategic ambiguity. Riyadh and Abu Dhabi had spent the preceding two years constructing a framework in which normalized relations with Tehran, active engagement with Washington, and hedged alignment with neither constituted a viable long-term position. U.A.E. diplomats were in Tehran in the weeks immediately before the strikes began.¹¹ Saudi Arabia's Defense minister had visited Iran's armed forces chief as recently as April 2025.¹² The logic was that Gulf states had too much economic exposure to absorb the costs of open alignment against Iran and too much security dependence on Washington to abandon American guarantees entirely. Fence-sitting, maintained with sufficient diplomatic sophistication, preserved their options.

Iran's decision to strike all six GCC states repeatedly, and against civilian and economic infrastructure removed the foundation of that strategy. The Gulf states had calibrated their hedging on the assumption that Tehran would distinguish between American and Israeli adversaries on one side and Gulf neutrals on the other. That distinction was not honored. The consequences have been increasingly registering in Emirati and Saudi signaling over the past week, and the trajectory points in one direction.

The most significant signal is Emirati Ambassador to the United States Yousef Al Otaiba's recent op-ed in *The Wall Street Journal*.¹³ Al Otaiba has historically been among the most disciplined and calibrated of Gulf diplomatic voices in Washington; his interventions in American policy debates are deliberate instruments. The op-ed's core argument is that a ceasefire without a conclusive outcome¹⁴ would create the conditions for the next crisis and that Iran must be stripped of its nuclear capabilities, missiles, drones, proxy networks, and the capacity to close international waterways before any settlement is viable. Al Otaiba addressed directly the question of whether the U.A.E.'s economic model could absorb the current disruption, reaffirming the \$1.4 trillion investment with the U.S., pointing to sovereign wealth reserves exceeding two trillion dollars and the Hormuz bypass pipeline as evidence of Emirati preparedness. The framing was an argument that the economic architecture that the U.A.E. has built is defensible only if the Iranian threat that now endangers it is resolved rather than suspended. An IRGC and Iran that survives does not merely impose a temporary premium on the regional operating environment but permanently re-prices the assumptions on which those models depend.

Saudi signaling has followed the same trajectory. Prince Sultan Air Base is now hosting U.S. strike operations—the same base Iran targeted by Iran on March 13, damaging five American refueling aircraft on the ground.¹⁵ MbS has publicly called Iranian strikes on Saudi territory “cowardly” and reportedly told President Donald Trump privately that the campaign represents a historic opportunity that should not be squandered.¹⁶ The kingdom that entered February as a formally neutral interceptor of Iranian salvos is

now a co-belligerent in all but declaration.¹⁷ The GCC states that collectively cautioned Washington against launching this operation are now, collectively, pressing Washington not to end it short of a conclusive outcome.

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