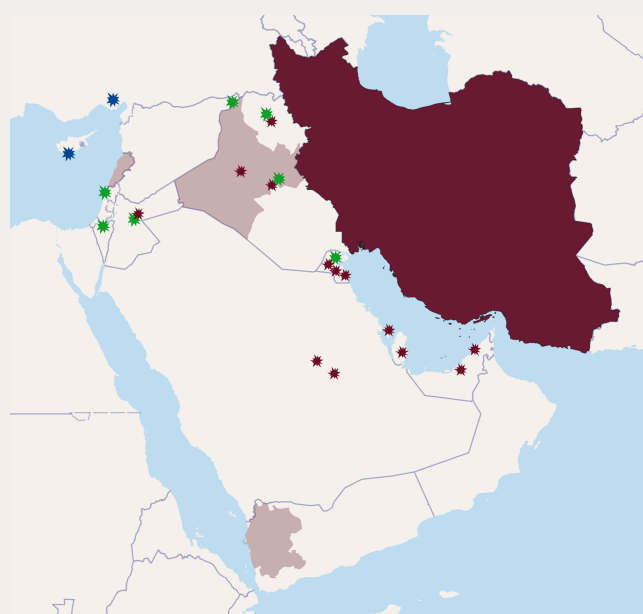






CEASEFIRE IN THE MIDDLE EAST: WHAT EVOLUTION PROSPECTS?

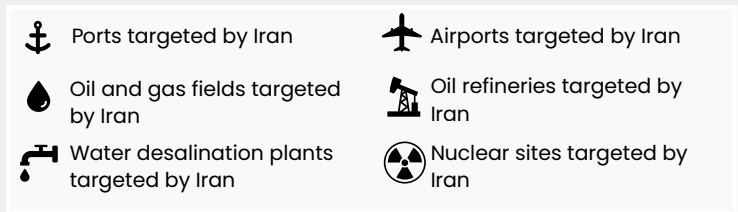
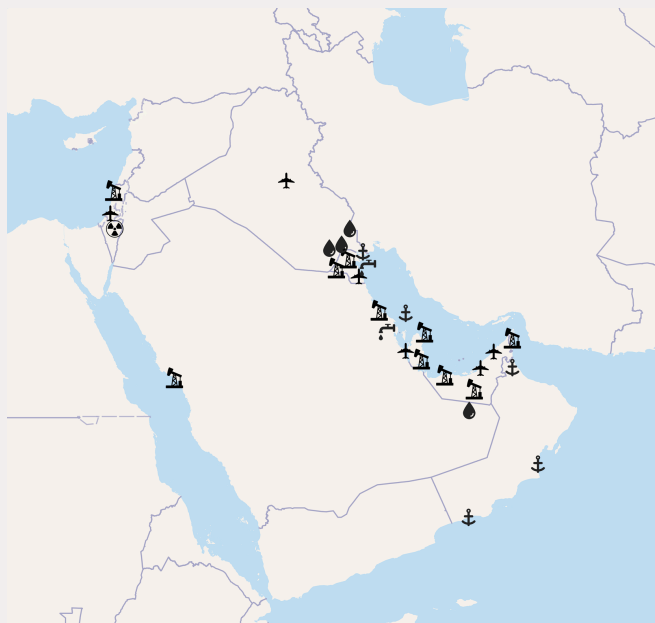
Since the beginning of the war on Iran on 28/02, Israel and the US, who launched joint military offensives, have had diverging objectives: Israel openly pursued regime change, while the US initially targeted Iran's nuclear program, only later alluding to the possibility of regime collapse. In total, 2,076 Iranians are reported dead and 26,500 injured (last recorded on 03/04). Key regime figures such as Supreme Guide Ayatollah Ali Khamenei have been killed. In retaliation, Iran has conducted sustained strikes against Israel and US forces across the region before expanding its campaign to transport and energy infrastructure in the Gulf on 02/03 and closing the Strait of Hormuz (SoH) on 03/03. Iran's strategy sought to paralyse the region's economy and halt oil and gas exports, particularly targeting GCC countries that have partnerships with the US.

Iranian proxies joined the conflict, specifically **Hezbollah** in Lebanon, which targeted Israel, and **Shia Iran-backed militias** in Iraq, which struck US and US-allied interests in Iraq. In Yemen, the Houthis only entered the conflict on 31/03, keeping their involvement limited by targeting Israel solely and not resuming their strikes on ships in the Red Sea (2023–2025).

On 07/04, the US government announced a two-week truce. The announcement came one hour before the expiration of US President Donald Trump's ultimatum for Iran to reopen the Strait of Hormuz, which had been closed since 03/03. Donald Trump had notably threatened to erase the Iranian civilisation if the Strait was not reopened. The US justified this truce by affirming that regime change had already been achieved following the death of Supreme Guide Ali Khamenei and the nomination of his son Mojtaba Khamenei. However, the government's ideological line has not changed. Nonetheless, the truce appears fragile as Iran's and US' demands diverge greatly. The US submitted a 15-point plan in which it demanded **Iran close its nuclear program, stop funding its regional proxies and reopen the SoH**. Iran rejected this plan and reportedly demanded a **full US withdrawal from the region, its acknowledged sovereignty over the SoH, and a US-paid financial reparation for damages** caused by the war. Iran also asked for **Lebanon to be integrated within the deal**, as Israel continues to strike Hezbollah across Lebanon (more than 500 dead since 07/04) and no agreement has been found as of this date. Although Israeli Prime Minister Benjamin Netanyahu backed the US-brokered deal, his decision was criticised by Israeli government and Parliament members who believe the war objectives in Iran had not been completed. Despite the implementation of the truce, Iranian strikes were reported in Kuwait and the UAE on 08/04, highlighting the situation's volatility and the risks of renewed violence in the region.



-  US interests targeted by Iran
-  US allied base targeted by Iran
-  Targets of Iran-aligned armed groups
-  Territories where groups of the Axis of Resistance operate



OUTLOOK

Three days after the ceasefire was implemented, its fragility remains exacerbated by Israel's continued and intensified strikes on southern Lebanon and Beirut since 07/04. Although Israeli PM B. Netanyahu reportedly engaged in negotiations with Lebanon on 09/04, Iran threatened to withdraw from the deal and has refused to take part in the negotiation talks with the US set to begin on 10/04 in Islamabad, until Israel stops its strikes on Lebanon. Similarly, the Iran-backed Shia militias in Iraq threatened to resume strikes on US interests in the country, deeming Israeli attacks as violations of the ceasefire.

In the event of continued violations of the agreement and as tensions rise between the two parties, strikes from either side may resume, along with a new blockade of the Strait of Hormuz by Iran. Since 08/04, Iran has notably halted several tankers attempting to cross the SoH in response to the ongoing Israeli strikes in Lebanon.

However, even if Israel reduces its attacks on Lebanon and talks do take place between the US and Iran in Pakistan, some negotiating points may complicate and stall the peace process. More specifically, control over the SoH may become an important point of contention as Iran reportedly demands recognition of its supremacy over the Strait. Similarly, the question of the Iranian stocks of enriched uranium may raise tensions as B. Netanyahu demanded they be handed over.

Moreover, even if the two-week truce is maintained and further negotiations for a lasting peace are engaged, hostilities persist. In addition, the fact that all parties have engaged in diplomatic talks does not exclude the potential planning of new military operations in parallel or the resumption of attacks. This was notably the case on 28/02 when the US and Israel launched joint military offensives on Iran while the US was engaged in talks with Iran on its nuclear program.

In the Gulf, GCC countries such as Kuwait, Saudi Arabia, the UAE, and Qatar may continue to be struck sporadically by Iran as Tehran tries to pressure the US into accepting its peace conditions. In the long term, these countries may choose to reinforce their strategic military partnerships with countries other than the US, as the American military presence on their soil does not guarantee their security anymore. If a deal is concluded between Washington and Tehran, with significant US concessions, the conflict would have highlighted how Gulf states can be used as an adjustment variable for Iran to obtain relative victories.