

**Focus: The War-Torn Middle East:
The Iran War and Its Implications (Summary)**

1 Stalemate of the “New Middle East” and its dive into Ontological battle Against the “Old Middle East”

Keiko Sakai (Professor, Center for Advanced International Studies, Chiba University; Director, Center for Relational Studies on Global Crises)

The Iran war and the Gaza war that preceded it were attempts to violently and impulsively break the deadlock resulting from the failure of the “New Middle East” initiative — pursued in the region over the past 30 years — on both the Israeli-Palestinian front and the Persian Gulf front simultaneously. Missing from Israel’s vision of a “New Middle East” since the Oslo Accords and sought to normalize its relation with the Arab states is coexistence with Palestine and, since October 7, 2023, Israel has been showing increasingly expansionist tendencies, premised on its hegemony as the region’s sole dominant power. The Arab Gulf monarchies, which intervened in the region’s civil wars following the Arab Spring and emerged as regional powers in the “New Middle East” through proxy wars, had maintained a precarious stability while waging a new Middle Eastern Cold War against Iran, a power that had extended its influence in the region following the Iraq War and the fight against ISIS. Since common ground was established between Israel and the Gulf states through the Abraham Accords, these monarchies tend to synchronise with Israel through a battle for survival during the ongoing war with Iran.

2 Is Autonomous Security Possible for the Gulf States?

Shuji Hosaka (Senior Researcher [Professor], Waseda University Research and Innovation Center; Member of the Qatar Chair Project)

The Iran War, which broke out on February 28, 2026, has had severe economic and diplomatic impacts on the Gulf Cooperation Council (GCC) countries and has significantly shaken the regional security framework. Iran’s blockade of the Strait of Hormuz has also exposed the vulnerability of the global energy security system and highlighted the need for resilient supply chains that bypass the Strait of Hormuz. Furthermore, Iran’s saturation attacks using low-cost missiles and drones, coupled with its “cost-imposing tactics,” have caused extensive damage not only to military bases within the Gulf states but also to energy facilities and civilian infrastructure, clearly exposing the limitations of the defense capabilities of GCC member states that rely on US security. This paper elucidates the process by which Gulf states are seeking new survival strategies—including the diversification of external partners—while maintaining the framework of the US-centered security system, noting in particular how the lack of unity among GCC member states, centered on the conflict between Saudi Arabia and the UAE, is hindering the GCC’s ability to establish a unified stance toward the war with Iran.

3 The Trump Administration’s Middle East Policy and Gulf Security

Chie Ezaki (Professor, Department of International Relations, School of Humanities and Social Sciences, National Defense Academy)

The first Trump administration took office amid fears among Gulf allies that the Middle East policy of the previous Obama administration—which had concluded a nuclear agreement with Iran—would lead

to the US “abandoning” them. The Trump administration sought to dispel these fears by brokering the Abraham Accords, which were viewed as a containment strategy against Iran, but remained reluctant to engage militarily. Consequently, Gulf states continued to harbor concerns about the US’s commitment to protecting its allies. The second Trump administration returned the US to a stance of direct military engagement for the Gulf countries. The administration commended Israel’s attacks on Iran started in June 2025 and, having gained confidence from its swift and overwhelmingly successful “decapitation operation” in Venezuela in January 2026, decided to launch an attack on Iran at February 28th. However, as a result of the war with Iran that Trump chose to wage, Iran gained the upper hand by blocking the Strait of Hormuz. Restoring the pre-war conditions required ending the war. The US’s provisional ceasefire agreement with Iran in April, which was reached without having achieved most of her war objectives, cast a shadow over US influence.

4 The Transformation of Iran’s Revolutionary Regime: What Did the Two Wars Change and How?

Yasuyuki Matsunaga (Professor, Graduate School of Global Studies, Tokyo University of Foreign Studies)

On February 28, 2026, Iran’s head of state and the Commander-in-Chief of the Revolutionary Guards were killed in an airstrike. Despite enduring 40 days of attacks by the United States and Israel, Iran’s Islamic revolutionary regime continued its military counterattacks. Leveraging its de facto blockade of the Strait of Hormuz, it succeeded in negotiating a memorandum of understanding—including an agreement to end the war—through diplomatic negotiations. Although attacks by both sides have continued since then and the ceasefire agreement has stalled, Iran’s political system remains intact. However, the June 2025 Twelve-Day War and the ongoing war that began in February 2026 have forced the system to undergo transformation. Based on what had become clear as of the end of July—five months after the outbreak of war—this paper discusses how these two wars are transforming Iran’s Islamic revolutionary regime, with a focus on two aspects: the growing influence of the Revolutionary Guards, which are responsible for maintaining the regime, and the substantive changes in the rule of Islamic jurists brought about by the selection of the assassinated Supreme Leader’s second son as his successor.

5 The Middle East Crisis and Its Impact on Global Energy Markets

Takafumi Yanagisawa (Executive Analyst, Research Strategy Group Manager and Gas Group Manager, The Institute of Energy Economics, Japan)

The current crisis in the Middle East since the end of February 2026, particularly the blockade of the Strait of Hormuz, is imposing constraints on crude oil and LNG exports, which account for about 20 percent of global trade volume respectively. Crude oil is currently being exported via detour routes, primarily via the Red Sea from Saudi Arabia and via the Port of Fujairah from the UAE; however, volumes have fallen to about half of pre-crisis levels and, with the situation around the Red Sea deteriorating further, the outlook remains uncertain. Regarding LNG, exports from Qatar and the UAE have become difficult, and there are no viable detour routes at this moment for LNG unlike crude oil; moreover, delays in the LNG expansion projects of both countries are also concerns. Crude oil and LNG prices have also surged, and price volatility remains high. While reduced imports by some countries and increased supply from outside the Middle East have mitigated price increases to a certain extent, risks such as policy changes and political instability exist outside the Middle East as well. Japan has been relatively managing the related disruption through the release of oil reserves, alternative procurement, and the utilization of other energy sources, but it needs to continue diversifying procurement,

strengthening public-private partnerships, and pursuing dialogue with exporting and importing countries for its energy security.

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