



SAGE Intelligence Brief –

IRAN: REASONS FOR OPTIMISM... WITH CAVEATS

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In the midst of alarming headlines and global tensions, a nuanced examination of Iran's internal dynamics suggests a complex landscape that challenges the prevailing narrative of imminent conflict. While the external image portrays Iran as a formidable force, internal fractures and vulnerabilities present reasons for cautious optimism.

Fragmented Internal Structure: Iran's leadership, embodied by the Ayatollahs, appear as a united and popular moral and religious authority, but their competence in economic and political management and public appeal is questionable. The Islamic Revolutionary Guard Corps (IRGC), operating as a quasi-independent entity, exploits state funds for its network of Arab proxies. This is not a popular policy option among average Iranians. Why give Iranian revenues to overseas causes when this money is badly needed at home to repair the domestic economy? This internal fragmentation between Iran's leaders and their disconnect with the general population weakens Iran. Corruption within Iran further erodes the regime's credibility, as average Iranians seek a life free from state interference.

Proxy Dynamics: The activities of the IRGC create an illusion of strength, but recent events, such as Hamas facing Israel without overt Iranian support and southern Lebanon's Hezbollah's cautious approach in dealing with Israel, reveal underlying weaknesses. Iran may run a formidable network of proxy forces, but if Iranian authorities are not able to provide direct support of their proxies, they may collapse when faced by the superior firepower of Israeli and/or U.S. forces. It should be noted that when the IDF strikes at Iranian proxies, they often take out significant proxy commanders. When Iranian proxies strike Israeli or U.S. regional interests, the damage caused by these strikes often results in light injuries among military personnel and property damage. This suggests a critical deficiency in the IRGC's identification and targeting capabilities and those of its proxy forces. This will not improve in the near-term considering Iran is a poor country with an underdeveloped local military-industrial-technology base. Iran's limited ability to mask the movement of men and material to proxy groups, especially to non-contiguous groups such as Hamas and Yemen's Houthis makes extending IRGC protection to them, problematic.

Iran's Economic Struggles: President Raisi's lack of popularity, coupled with a failing economy and soaring poverty rates, indicates the government's inability to provide basic security for its citizens. This economic distress raises questions about the feasibility of mobilizing the Iranian population for a high-intensity war.

Iran's Limited Military Experience: Iran has not engaged in a major conflict since 1988 (Iraq-Iran War – 1980-88), highlighting a 36-year gap in contemporary warfare strategies. While technological advancements have occurred, especially in drones, the utility of cyber and ballistic missiles, the necessity of a supportive population for a high-intensity war remains unchanged.

Potential Popular Support: In the event of an external attack on Iran, there might be a "rally around the flag" phenomenon, where some Iranians unite in support of their government and its objectives. However, the prolonged absence of genuine popularity for the ruling regime raises doubts about the duration and effectiveness of such a rallying were Iran to come under foreign attack.

Risk of Internal Opposition: War-induced strains on the population could lead to average Iranians turning against their own government, especially if it jeopardizes their lives and livelihoods. The fragmented Iranian government agencies recognize this risk, emphasizing the delicate balance needed to maintain regime stability.

Caveat: While there is a possibility of some level of public support in the face of external aggression, the internal dynamics of Iran, marked by fragmentation, corruption, and economic woes, suggest that the regime's cautious approach is rooted in the need to preserve its survival. In any autocracy, REGIME SURVIVAL IS THE PRIMARY GOAL. In this case, military escalation is a double-edged sword for Iran that could either bolster the regime – HIGHLY UNLIKELY – or trigger internal opposition – HIGHLY LIKELY – making the situation extremely precarious.

This analysis is subject to evolving developments in the region, and further updates may be warranted.

About SAGE International:

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