

Iran's Massive Strike Doctrine | Prof. Pascal Lottaz

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#Pascal

Welcome, everybody, to an update on the third day of the Iran war. My name is Pascal Lottaz. I'm an associate professor at Kyoto University, and I'd like to talk to you about what we've learned during the day. It's now early evening in Japan—about midday in Tehran and nighttime in the United States—and what we're seeing is basically an expansion of the war, with more countries getting drawn in or now, for very logical reasons, actually in the line of fire. So, first of all, Hezbollah has launched rockets at Israel for the first time since the phony ceasefire that was implemented at the end of 2024, and the Israeli army, predictably, is responding by targeting Beirut.

And we're also seeing that in Kuwait, apparently, United States aircraft have been hit. The Iranians are firing missiles at basically anyone in the region. Toward the latter part of this presentation, I'll talk about why that is—I think one of the analysts has it spot on. So currently, Iran is firing at anyone, everybody who hosts any form of U.S. or Israeli military personnel or equipment, and that has rather large implications. For one, the first thing I need to point out is that we now have an announcement by Keir Starmer, which came out about half a day ago, in which he says he will be opening British air bases to the United States.

This is something he had ruled out—especially Diego Garcia. He had said those air bases couldn't be used by the United States. And, well, very predictably, he walked all of that back. I think it's important that we hear these people in their own words, so I'd like to play this for you at 1.5 speed. Please have a listen, and then we'll talk about it in a moment. The important thing, of course, is that the UK has now officially decided, politically, to join the action. But please listen to how this is framed.

#Moderator

Yesterday, I spoke to you about the situation in the Gulf and explained that the United Kingdom was not involved in the strikes on Iran. That remains the case. Over the last two days, Iran has launched sustained attacks across the region at countries that did not attack them. They've hit airports and hotels where British citizens are staying. This is clearly a dangerous situation. We have at least

200,000 British citizens in the region—residents, families on holiday, and those in transit. I ask all our people in the region to please register your presence and follow Foreign Office travel advice. I know this is a deeply worrying time, and we will continue to do all we can to support you.

Our armed forces, who are stationed across the region, are also being put at risk by Iran's actions. Yesterday, Iran hit a military base in Bahrain, narrowly missing British personnel. The death of the Supreme Leader will not stop Iran from launching these strikes. Their approach is becoming even more reckless and more dangerous to civilians. Our decision that the UK would not be involved in the strikes on Iran was deliberate, not least because we believe the best way forward for the region and for the world is a negotiated settlement—one in which Iran agrees to give up any aspirations to develop a nuclear weapon. But now Iran is striking British targets.

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And I just have to emphasize again: until now, Iran kept saying, “We don’t want any nuclear weapons.” There was a fatwa issued by Ayatollah Khamenei, who is now dead, stating that nuclear weapons are incompatible with Islam. So they’ve just killed the one person—the most important person—standing in the way of Iran acquiring nuclear weapons. Sorry, I just needed to throw that in there.

#Moderator

Interests nonetheless are putting British people at huge risk, along with our allies across the region. That is the situation we face today. Our partners in the Gulf have asked us to do more to defend them, and it is my duty to protect British lives. We have British jets in the air as part of coordinated defensive operations, which have already successfully intercepted Iranian strikes. But the only way to stop the threat is to destroy the missiles at their source—in their storage depots or the launchers used to fire them. The United States has requested permission to use British bases for that specific and limited defensive purpose. We have taken the decision...

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Sorry for stopping here, but we have to appreciate just how Mr. Starmer manages to frame the attack on Iran—and the deliberate intention to destroy military equipment in Iran—as a defensive purpose. It’s the epitome of warmongering, right? When you deliberately frame an attack on the other side as something that needs to be done to protect your own equipment. He literally, just 30 seconds earlier, said that any threat to UK equipment and personnel in the region was intolerable, whereas now he’s saying it must be absolutely tolerable for Iran to accept the destruction of its equipment and the death of its military personnel. I mean, it’s quite a fantastic statement, actually—pure doublespeak. But you can see how difficult it is for him to twist this around. Of course, a good part of the Western public will probably follow this logic. But let’s finish—let’s hear him out.

#Moderator

To accept this request is to prevent Iran from firing missiles across the region—killing innocent civilians, putting British lives at risk, and hitting countries that have not been involved. The basis of our decision is the collective self-defense of longstanding friends and allies, and the protection of British lives. That is in accordance with international law, and we are publishing a summary of our legal advice. We are not joining these strikes, but we will continue our defensive actions in the region. We will also bring experts from Ukraine, together with our own experts, to help Gulf partners shoot down Iranian drones attacking them.

I want to be very clear: we all remember the mistakes of Iraq, and we have learned those lessons. We were not involved in the initial strikes on Iran, and we will not join offensive action now. But Iran is pursuing a scorched-earth strategy, so we are supporting the collective self-defense of our allies and our people in the region, because that is our duty to the British people. It is the best way to eliminate the urgent threat and prevent the situation from spiraling further. This is the British government protecting British interests and British lives.

#Pascal

Yeah, no, you're not doing that, Starmer. You're doing the opposite. Instead of trying to tell the United States and everyone to calm down, to signal that you will not participate in any of these actions and that you're condemning the U.S. actions—instead of that, you're supporting them. And there's no such thing as a defensive attack on another country. There's no such thing as defensive attacks on military installations in another country. There is no such thing. So it's complete nonsense, of course. And the legal thing you're talking about here—you've just realized that a lot of people are going to say, "Hey, isn't this against international law?" And now you're going to put out some phony report by some phony analysts or international lawyers who'll be able to tweak it, right?

They'll use this and frame it as an instance of collective self-defense, because the other side is defending itself against the U.S. and its allies. So you can see now what the U.K.'s strategy is—and probably the Europeans will follow the same line. They'll say, "We need to defend ourselves against being attacked by Iran," focusing on the fact that Iran is shooting back, right? Shooting at anyone who's hosting, at all the military bases hosted in these countries. I mean, I must say, Iran doesn't attack the countries that host the bases—it attacks the bases, right? And there are several layers of strategy to that. One of them is, of course, to convince these countries not to host those bases anymore in the future. But we'll come to that.

The one thing where I think he's right—because another analyst used that term too—is that it's actually a scorched-earth strategy. And we'll come back to this very soon. But the interesting thing that happened today is that Iran clearly heard the prime minister. They understood what he said, and only a couple of hours after he gave that talk, the Iranians actually attacked the Royal Air Force base in Cyprus. So the Brits have a base in Cyprus. Cyprus, of course, is a member of the European

Union, and they attacked that one. At the moment, it's still being framed as a drone crashing into it, but it's pretty clear that Iran—the Iranians—have now sent a very, very strong signal that EU territory is not off-limits if it hosts hostile militaries.

It's quite clear that this is also meant as a message to the rest of the European Union—to France and Germany: do not get involved unless you want to be struck, because Britain has already decided it wants to be involved in the war. And let's just have a look now at what Mr. Araghchi is saying about their strategy. This is, again, the foreign minister of Iran, who's luckily still alive, together with the president and others. It's the bureaucratic and military leadership that was taken out by Mr. Trump—by the Americans—the other day. But Mr. Araghchi is saying that they've had two decades to study the defeats of the U.S. military to their immediate east and west—meaning Afghanistan and Iraq—and that they've incorporated those lessons accordingly.

Bombings in our capital have no impact on our ability to conduct war. Decentralized, mosaic defense enables us to decide when and how. So the Iranians are clearly saying that they're anything but defeated, anything but down—that they have a strategy to face exactly the moment that has now come upon them, to defend against the overwhelming might from the other side, from Israel and the United States. So how are they doing this? I mean, we're already hearing reports that Donald Trump said he was open to talks with Iran. He gave a second address at the White House—another one, a very bombastic one, and a very, very dark and mean-spirited one, you know, almost gleeful about the death his military was able to inflict.

And, you know, talking about the three U.S. soldiers who died yesterday in one of the attacks against U.S. military bases, and saying there will probably be more—but that this is what happens in war—which is extremely rich coming from a man who never served and actually evaded being drafted into the Vietnam War, right? Somebody who made sure he would never be in uniform, and then says people in uniform will have to die. But that's what it is. I couldn't really hear that he signaled openness for talks in there, but there are reports that he did. Although by now, some of the high Iranian officials—most importantly Ali Larijani, the head of the Supreme National Security Council—have said that Iran will not negotiate with the United States.

So Iran is making a point, at least officially, to say that this war will end only when the United States stops attacking—that they will defeat this attack, push it back, and not beg for mercy from the United States. Because at this point it's utterly clear, right? If the Iranians tried to sue for peace in one way or another, they would just be attacked again and again. I mean, by now Donald Trump has made it very clear that this fight, for the Iranians, is existential and about their future. In the speech he gave yesterday, he again emphasized that regime change is the goal, that he demands all military forces lay down their weapons, and that the Iranian people must now stand up. The rhetoric is that the U.S. is just supporting the Iranian people in rising up against their government.

And the Iranian government, on its side, is saying, "No, we are not weak at all. This is not where we are. There will not be any kind of revolution against us. We have the capacity, with our military

dispersed over our very large territory.” So I think the most important thing at this point is actually this strategy that’s now unfolding. And to look at that, I want to point out this report here that was posted by... by the Janus Project. What is his name? I’m sorry, I can’t find my note right now. But the Janus Project Global Analysis wrote a very succinct summary here, and I’ll read the entire text to you now, because I think it really fits with what Prime Minister Starmer just laid out, but explains in very clear terms what the Iranian approach probably is.

So let me read this to you. The rapid, unprecedented escalation of Operation Epic Fury is already the subject of rigorous analysis by analysts, strategists, and operations researchers. Although we’re still only within the initial 48 hours of the onset of hostilities, the current course of the operation reveals stark, alarming divergences between the tactical military success celebrated by the Allied coalition and the campaign’s long-term geopolitical viability. The joint U.S.-Israeli campaign and the Iranian response are already illustrating the structural limits of air power, the fragility of global energy markets, and the mathematics of modern interstate economics, exposing critical vulnerabilities in the U.S.-Israeli operational design.

It is questionable whether the United States and Israel are operating within a coherent and achievable theory of victory. The stated Allied war aims are maximalist: to permanently remove Iran from the ranks of confrontation states by either toppling the regime entirely or, failing that, completely disarming its massive ballistic missile and drone arsenal. However, historical precedents and rigorous operational modeling indicate that enduring regime change cannot be achieved solely through aerial bombardment. By executing a deception strike against Ayatollah Khomeini without introducing occupying ground forces or coordinating an internal revolutionary vanguard capable of securing the political vacuum, the Allied coalition has failed to constrain the Iranian state.

Instead, massive aerial kinetic expenditure merely cripples and fragments the state apparatus. It expands, rather than constrains, the space of possibilities for regional chaos. The death of the supreme leader, rather than inducing immediate societal capitulation or a Venezuelan-style democratic transition, has likely unified hardline Iranian nationalist elements and the surviving IRGC cadres under a desperate survivalist doctrine. Additionally, Iran’s aggregate arsenal—estimated prior to the conflict at over 2,500 medium-range ballistic missiles, 8,000 short-range systems, and tens of thousands of loitering munitions—is simply too vast and too deeply entrenched in subterranean qanat-style bunkers to be entirely disarmed from the air.

Recognizing their inability to win a conventional counterforce duel against U.S. stealth bombers, the regime’s decentralized surviving commanders have naturally defaulted to countervalue strikes against soft, highly lucrative targets. The U.S. lacks the physical defensive density required to permanently shield the oil monarchies from these dispersed asymmetric attacks. If these monarchies cannot be protected, Iran retains the capacity to wreck financial markets, devastate the global economy, and consequently destroy the political viability of the current U.S. administration for a generation—highlighting that the risks of escalation are multiplying hourly without a viable exit strategy.

Conversely, Western threat assessments have historically fixated on Iran's ability to mine or blockade the Strait of Hormuz. While disruptive, this is a maritime choke point that can eventually be secured and cleared by the United States Navy's overwhelming superiority. However, the true existential strategic lever available to Tehran is the systemic physical destruction of the onshore oil and gas processing infrastructure of the Gulf, because Saudi Arabia, the United Arab Emirates, Bahrain, and Kuwait serve as indispensable logistical co-belligerents, hosting the air bases and naval headquarters from which American power projects. Their critical energy nodes are therefore rendered legitimate high-priority military targets under the laws of armed conflict.

These facilities—specifically the export terminals—sit comfortably within range of Iranian short-range ballistic missiles, cruise missiles, and inexpensive Shahed drone swarms. If the IRGC, facing existential annihilation, initiates a scorched-earth campaign against these nodes, the physical backbone of the global energy system will be severed. The strategic calculus is to inflict such severe pain on global markets that the international community pressures the U.S. to halt its military operations. Financial markets have already begun pricing in this instability.

Brent crude closed at US\$72.87, and on Friday before the strikes, analysts at Barclays and Goldman Sachs projected that if the infrastructure-targeting scenario materializes, Brent crude will rapidly blow past US\$100 per barrel, representing a catastrophic 37% jump. Under such immense domestic economic pressure, the U.S. executive branch might implement draconian export controls to stabilize domestic fuel prices. This political maneuver would leave the European Union and the United Kingdom completely devoid of both Russian natural gas and Gulf energy supplies, effectively fracturing the Western geopolitical alliance and plunging Europe into an unprecedented energy vacuum.

Likewise, the U.S. and Israel are currently fighting a highly asymmetric war of attrition that Western military-industrial bases are poorly positioned to sustain economically. Operation Epic Fury relies almost exclusively on advanced ballistic missile defense systems to protect critical infrastructure. This requires the expenditure of multimillion-dollar interceptors, such as the Terminal High Altitude Area Defense (THAAD) and the Standard Missile 3, to defeat legacy Iranian ballistic missiles and mass-produced drone swarms that cost only a fraction of a single defensive interceptor. This inverted cost-exchange ratio strongly favors Iran's saturation strategy.

Iranian operational resilience, potentially backfilled covertly by material support from Russia or China, may simply outlast Western interceptor stockpiles. Iran's vast missile inventory serves effectively as an ablative sponge designed to absorb and exhaust Western high-tier interceptors. Once these finite interceptor stockpiles fall below critical operational thresholds, allied bases, aircraft carriers, and vital Gulf energy infrastructure will be left exposed to undefended cascading saturation strikes, rendering the allied position militarily unattainable. And this was a very long passage, and I apologize for that, but I think the analysis is absolutely brilliant. I'll put the name of the actual author who posted this on Twitter in the description of this video below.

It's very well done. So again, we can follow this, and I believe this is probably now the reason why Iran is striking against everybody. Iran needs to disable all of the U.S. economic and military infrastructure in the region in order to hit them where it really hurts and bring the fight back home through the economy, and by weakening the resolve of the Gulf states to maintain their close alliance with the United States. Because, again, the Iranians want to drive home the point to the Gulf states that it is their alliance with the United States that invited these attacks, not the other way around. The U.S. military infrastructure is the reason they got attacked—or why there are strikes on their territories, strikes on the military bases, right?

So getting rid of the military bases would resolve that issue, right? And I'm not saying that's a likely scenario anytime soon, but it seems that Iran is getting ready for a long-term aerial bombardment kind of war—an aerial war of attrition, a missile war of attrition. And they're now willing not only to threaten the Europeans but actually to shoot against them, using the vastness of their territory and the fact that they now have decentralized command to sustain a long-term bombing campaign against the other side and wear them down. Plus, they're creating a structural environment where it becomes so costly for the United States internally—for its domestic politics—that at some point they simply need to call it quits.

And if the United States quits, then Israel has no other choice but to quit as well. It seems that this is now the strategy of Tehran. Even if its leadership gets further decapitated, the structures below are set up so they can continue independently in their little nodes and nooks. And even though the United States has aerial superiority and can target basically any infrastructure in Tehran, the fact that there's so much of it—not only in Tehran but across Iran—poses a huge problem that you just can't overcome, especially with limited capacities on the ground. There's no magic button that can make hundreds of thousands of missiles just appear in the region.

And once the missiles—especially those from the aircraft carrier groups and so on—are fired, those ships will need to go and reload somewhere. So I suppose the Iranians are gambling on the long run, while the U.S. is still betting that this can be completed, that the regime—the government of Iran—can be overthrown within one or two weeks. Although Donald Trump seems very much aware that this might take considerably longer.

Now, Ursula von der Leyen is actually signaling that she's probably going to switch toward the UK assessment. At the moment, the European Union is still trying to say they're not involved in the fighting, although today's bombing—or strike—on Cyprus will certainly change that. But the pictures coming out right now are very dubious. I mean, I must say, on Twitter there's a lot of old video material from the 12-day war, and also videos from other countries, from other times when we had wars in the Gulf. But the ones that do get out and seem to be authentic—I suppose this one is, since we can see the U.S. base in Erbil, in Iraq—well, that's where we're now getting this picture from, of a large-scale attack.

And I suppose this has to do with oil being on fire over there. So the approach of the Iranians now is to lay waste to the oil-producing capacity of the entire Middle East, including, of course, Iraq, which is still partially occupied by the United States—I mean, still under the thumb and occupation of the United States. All of these targets are now going to be hit repeatedly in order to make them unviable. What does this leave us with? It leaves us with the grave problem that this war will probably last for quite a while, unless the Iranian government actually falls.

But the people in the government and in the government structures—including, of course, the military and the police branches—now have every opportunity and every incentive to keep going, to not let this one pass, and also, as Ali Larijani said, to not be fooled into another round of negotiations. Because even if the United States, after a couple of days or a couple of weeks, wanted to try for some kind of ceasefire agreement with the Iranians in order to go and reload...

That would only mean that the next round of the war would come pretty soon for Iran. So this time, Iran's strategy seems to be not to carry out any kind of targeted or very precise strikes on Israel to convince them to stop fighting. Instead, it seems that Iran is aiming to break the will and the industrial capacity—especially the oil-producing capacity—of the West in general, to actually make them retreat for good, or at least for quite a long time. Because at this point, the Iranians are trying to simply scare away the Americans, right? There's no chance that Iran could, in any way, shape, or form, threaten the U.S. mainland or win the war the way the Allied forces in the Second World War won against the Axis powers, right?

There's no question that, of course, Iran will not send any kind of troops to the U.S. mainland. But the whole goal must be to chase them out—to chase the United States out of the Gulf region—and then, in the end, make sure that the Gulf states stop their alliance. Basically, the power and support network of the United States in the Gulf would crumble and break apart. On the U.S. side, the incentive now is to use the Gulf states and tell them, "Look, you've been attacked; therefore, you need us to help you," even though it was because of the U.S. that they got attacked in the first place. And then use this might—that's the logic of the alliance builders—to use the alliance system to overwhelm and cripple the Iranians.

But as the report I just read out to you correctly states, we simply don't have a good example where an air campaign alone leads to the military capitulation of the other side or the fall of a government. Because again, usually what happens when someone attacks you is that you get more support from the population—the rally-around-the-flag effect. And while there are certainly people celebrating the death of Ali Khomeini, the general public and overall support are probably more on the side of those who shoot back at the people firing at them. This is what it looks like now, and if it continues for a few more days, that's likely how it will stay.

With every day that it continues, the balance of forces will actually shift toward the Iranians, and living in an economy that is not only under sanctions but under direct kinetic attack will become

something people get used to. I mean, we've seen in Gaza that after more than two years of genocide, people are still living in the area where they were attacked. We see how populations adapt to situations of war—which is not a good thing. It's nothing good. I'm absolutely devastated that this is happening to the Iranians now, that Iran is being pushed into this horrible situation. But we've seen before how entire populations, for years on end, continue with resistance wars against this kind of aggression. We saw it in Vietnam—it cost millions of lives, cost billions of dollars in Vietnam.

And it seems that at the moment we're looking at maybe a similar scenario, because if the initial airstrikes fail to produce the outcome Trump and Netanyahu want, then of course the incentive on the American and Israeli side will be to escalate to ever more horrible types of bombing campaigns. The logic they're following is one of trying to undermine the public's resolve to fight this war. And we've already seen, on the very first day, that a school was attacked by Israeli missiles and more than a hundred girls died in that attack. So nobody can tell me that the most moral army in the world, the most sophisticated army in the world, is not able to differentiate between a school and a military compound.

So we must assume that this was intentional. And this follows, of course, the pattern we've seen in Gaza. It follows the pattern we've seen in Turkey, Syria, and Lebanon—that the Western side, meaning Israel, the United States, and NATO, actually fires directly at civilian targets on purpose in order to break the will of the population to fight. So the danger in Iran is, of course, that as the Iranian military forces dig themselves in—maybe quite literally, in order to survive bombings—the American side will start large-scale bombings of civilian infrastructure, of cities. Think of Dresden, think of Munich, but also think of the firebombings of Tokyo and, God forbid, a nuclear weapon in a densely populated area.

But that type of warfare—just to, through sheer cruelty, force the enemy to surrender or lose the entire country—that's probably the kind of thinking, the kind of logic, that will appear on the United States' side. But short of that, the strategy on Iran's side now seems to be to win the war structurally and force the retreat of the aggressors, to make it economically and militarily, logistically impossible to continue the bombings. And once the bombing stops—not because a deal was reached, but because the US and Israel lose the capacity, the capability, to maintain the bombings—that will be the point when Iran will probably declare victory and say they didn't come to this point because they were forced to the negotiating table, but because they were able to defend their country in the proper way.

Now, again, whether the United States will go down that route and accept that, or whether they will then start these large-scale bombings with weapons of mass destruction against the civilian population, is another question. I pray to God that that will never happen, and that the nuclear—especially the nuclear—weapons will remain where they are, and that also the other weapons of mass destruction, because there are other weapons that can be used to create large-scale dying, will never become a reality. Hopefully, public unrest in Western countries, public opposition, will be strong enough to restrain the Western side from ever going this far.

We'll see what the European Union does—especially Germany and France—whether they'll follow the UK in opening up to... I mean, they don't have bases directly in that area, as far as I know, especially the Germans, but they do have logistics hubs that could be used if they open them officially to the United States. Of course, Germany is a huge staging ground for U.S. forces, and they're probably, as we speak, being used for the operation in West Asia. But we'll see how far Germany and France are willing to politically and officially support the U.S. in this war of aggression. Only time will tell. We'll see updates in the near future. And thank you for your attention.