

The War's Most Dangerous Week Begins: A Threat to Dubai's Port, a Bombed Oil Hub, and a White House Insider Calling for Exit

In the last 24 hours: the US struck Iran's main oil export island while sparing its crude facilities and explicitly threatening to destroy them if Hormuz stays closed. Iran responded by threatening to bomb Dubai's port. Trump's own AI czar went public calling the war a catastrophe in the making. And US gasoline crossed \$3.68, now roughly 6 days from the \$4.00 political red line. The conflict has entered its most structurally unstable phase.

15	\$104	\$3.68	13	~\$200B
Days of war	Brent crude	US avg gasoline	US service members killed	Est. supply disruption/month

THE KHARG GAMBIT: A DEAL STRUCTURE — OR A COUNTDOWN TO CATASTROPHE

On the night of March 13–14, the United States carried out one of its largest single strikes of the conflict, destroying 90+ military targets on Kharg Island — Iran's main oil export terminal, handling roughly 90% of the country's crude exports. The oil facilities were deliberately left intact.

Trump's accompanying message, posted immediately to Truth Social, was precise:

"For reasons of decency, I have chosen NOT to wipe out the Oil Infrastructure on the Island. However, should Iran, or anyone else, do anything to interfere with the Free and Safe Passage of Ships through the Strait of Hormuz, I will immediately reconsider this decision."

— President Trump, Truth Social, March 13, 2026

This is the first concrete coercive mechanism of the conflict. The logic is straightforward: Iran reopens Hormuz, the US spares Kharg's oil facilities. Iran loses Kharg revenues (~\$20+ billion per year) if it doesn't comply. Both sides could claim a version of success. For the first time in 15 days, there is a transaction on the table.

Iran's parliament speaker had specifically warned, the day before the strike, that hitting Iranian oil infrastructure would provoke "a new level of retaliation." The US struck military targets only. Iran's response was telling:

"Iran will attack any energy infrastructure in the region which belongs to an American company or an American company is a shareholder."

— FM Abbas Araghchi, March 14, 2026

So both sides have now explicitly threatened each other's energy infrastructure. This is not de-escalation. It is mutual deterrence being built at high speed, with global energy markets caught

in between.

IRAN THREATENS DUBAI'S PORT — A LINE THAT HAS NOT BEEN CROSSED BEFORE

Within hours of the Kharg strike, Iran's IRGC issued evacuation warnings for three UAE ports: Jebel Ali (the Middle East's busiest port, through which roughly 30% of all regional trade flows), Khalifa, and Fujairah. The IRGC claimed — without evidence — that the US launched the Kharg strikes from UAE territory.

NEW

This is the first time Iran has directly threatened civilian port infrastructure of a neighboring country. All previous Iranian strikes were described as targeting US military assets, even when civilian infrastructure was struck. The UAE, Qatar, Saudi Arabia and Bahrain are US allies who did not start this war.

A fire broke out at Fujairah's bunkering hub from drone debris on March 14 — the emirate handles ~1 million barrels per day of Murban crude. The UAE's air defenses intercepted 9 ballistic missiles and 33 drones on that same day. Qatar intercepted 4 ballistic missiles and several drones. Kuwait's Ahmad Al-Jaber Air Base sustained material damage.

Whether Iran actually strikes Jebel Ali is the single most consequential near-term question in the conflict. If it does: oil and equity markets will enter territory not seen in the modern era, and the path to Catastrophe becomes near-certain. If it does not: the threat has been revealed as a signal, not a commitment, which weakens Iran's deterrent posture for future coercion.

A WHITE HOUSE INSIDER BREAKS: "DECLARE VICTORY AND GET OUT"

David Sacks is President Trump's AI and cryptocurrency czar, a venture capitalist and one of the president's closest public supporters. On March 13, speaking on the All-In Podcast, he became the first figure inside the Trump orbit to publicly call for an exit from the war.

"We've degraded Iranian capabilities massively. This is a good time to declare victory and get out, and that is clearly what the markets would like to see."

— David Sacks, Trump's AI czar, All-In Podcast, March 13, 2026

Sacks warned of what he called Iran's "dead man's switch" over the Gulf's economic fate: Iran does not need to defeat the US militarily to impose catastrophic damage. It only needs to continue targeting desalination plants — which supply drinking water to approximately 100 million people on the Arabian Peninsula. He raised, explicitly and unprompted, the possibility of Israel contemplating nuclear escalation if the conflict drags on for weeks or months.

He also named, for the first time publicly, the internal dynamic: a "faction, largely but not exclusively in the Republican Party" is pushing Trump toward ground troops and further escalation. Sacks is publicly trying to prevent that outcome.

Reuters separately reported that White House economic advisers are privately pressing Trump on gasoline prices as a political vulnerability. The Off-Ramp scenario — previously rated at 13-16% — rises modestly to 16-20% based on these signals. But Sacks's influence depends entirely on whether Trump is listening.

THE NUMBERS THAT MATTER

Seven US air refueling aircraft were degraded in a 24-hour window. Six KC-135 crew members were confirmed dead from the March 12 crash (CENTCOM, March 14 — the earlier count of 4 was incomplete). Five additional KC-135 Stratotankers were damaged in an Iranian strike on a Saudi airbase (WSJ, March 13). The KC-135 is the backbone of long-range US strike operations. SOF News assessed: "the Air Tasking Order may be downsized quite a bit over the next several days."

The IEA's record 400-million-barrel reserve release — the largest in the organization's 50-year history — is covering about 15% of the supply gap. The math: 400 million barrels released over 120 days equals approximately 1.4 million barrels per day. The supply disruption is 15–18 million barrels per day. The release takes 13 days to reach the market. Oil rose anyway. Wood Mackenzie, one of the world's leading energy research firms, put it plainly: the market needs \$150 per barrel for demand destruction to rebalance supply without Hormuz reopening. Their chairman added that \$200 per barrel is “not outside the realms of possibility in 2026.” Alpine Macro warned that if the Houthis close the Red Sea simultaneously, the shock is compounded by an additional 5 million barrels per day.

\$3.68	\$4.00	~6	\$5.02
US gas today (AAA)	Political red line	Days at current rate	2022 peak (D's lost House)

WHERE THIS GOES: THE FOUR SCENARIOS, UPDATED

The Catastrophe scenario is now clearly the most likely single outcome for the first time. Combined, the two worst scenarios account for about 75–80% of probability.

CATASTROPHE Escalation	43–48%	Iran follows through on UAE port threat, OR Trump orders Kharg oil infrastructure struck and Iran retaliates against US company energy assets across the Gulf, OR Houthi Red Sea closure triggers two-strait disruption, OR ground-capable USS Tripoli is used offensively. Any single one of these could occur within days. (↑ from 40-45%)
QUAGMIRE Prolonged Attrition	29–33%	War continues at current intensity. Both sides apply coercive pressure but neither crosses the decisive escalation threshold. The Kharg ultimatum and Iran's UAE threats remain signals rather than actions. Air operations slow due to KC-135 losses. (↓ from 34-38%)
OFF-RAMP Negotiated Exit	16–20%	The Kharg coercive framework creates a deal structure: Iran partial Hormuz compliance, US holds back on oil infrastructure. David Sacks + internal economic advisers + Turkey FM Fidan backchannel + Trump-Xi summit (16 days) all point in this direction. First time Off-Ramp probability has risen since Day 1. (↑ from 13-16%)
QUICK WIN Regime Change	2–3%	Functionally eliminated. IRGC fully pledged to Mojtaba. Netanyahu himself said regime change requires the Iranian people, not airstrikes. US NIC classified report confirmed regime would not fall. (Stable)

THREE THINGS TO WATCH IN THE NEXT 72 HOURS

The next three days are probably the most consequential of the conflict so far.

1	Does Iran attack Jebel Ali or UAE civilian ports?
	Iran has issued the warning. Now it must act or signal retreat. Jebel Ali handles ~30% of Middle East trade. A confirmed strike would push oil above \$130, accelerate Catastrophe scenario, and potentially trigger UAE retaliation. No strike in the next 24-48 hours suggests Iran's threat was a deterrence signal rather than a commitment.

Does Trump order Kharg oil infrastructure struck?

2

Trump has made the condition explicit: Hormuz interference triggers Kharg oil strikes. Iran is still interfering. The gap between the stated condition and reality is closing daily. Iran's parliament warned this would cause 'a new level of retaliation' and the FM has promised to hit US company energy assets across the Gulf. Watch CENTCOM orders and Trump Truth Social tone.

Does the Turkey Fidan channel produce anything tangible?

3

Turkish FM Fidan said Iran 'may be open to back-channel diplomacy.' Turkey is the best-positioned intermediary that doesn't compromise either side's optics. If Fidan-Araghchi or Fidan-Witkoff produces any draft framework in the next 72 hours, the Off-Ramp probability moves up materially. Watch for State Department signals and Turkish foreign ministry statements.

A NOTE ON METHODOLOGY The scenario probabilities in this brief are produced by a Bayesian model that weights expert opinion by historically verified predictive accuracy across 113 scored predictions from 2015–2025. The model does not weight analysts by prominence, ideology, or institutional affiliation — only by track record. All quotes are sourced from public statements after March 1, 2026. Full sourcing, raw prediction data, and technical methodology appear in the complete intelligence report that follows.

Strategic Intelligence & Bayesian Assessment Consortium • Day 15 • March 15, 2026
Full technical report, expert prediction audit, and military panel raw data follow on the next page.

Comprehensive Strategic Intelligence Assessment DAY 15 REPORT • MARCH 15, 2026

15	\$104	13	1,444+	4,400+	773+
Days of War	Brent Crude	US KIA	Iran Civilian KIA	Iran Military KIA	Lebanon KIA

Prepared by the Strategic Intelligence & Bayesian Assessment Consortium

THIS DOCUMENT IS SELF-CONTAINED AND SUPERSEDES ALL PRIOR DAILY UPDATES

SECTION 1: EXECUTIVE SUMMARY

Operation Epic Fury has entered Day 15. Three new strategic facts define this report: (1) the United States struck Kharg Island — Iran's main oil export hub handling ~90% of crude exports — while deliberately sparing oil infrastructure, creating an explicit coercive ultimatum; (2) Iran has for the first time directly threatened civilian port infrastructure in a neighboring state (UAE), signaling willingness to expand the war beyond US military targets; and (3) a senior White House insider (Trump's AI czar David Sacks) publicly broke ranks, calling for an exit and warning of potentially catastrophic escalation including Iranian nuclear deterrence activation and a Gulf rendered "almost uninhabitable."

Top-Line Findings

- Kharg Island strike changes the game's coercive structure: Trump has explicitly linked oil infrastructure survival to Hormuz reopening. Iran has explicitly threatened to strike US company energy assets in the region if its oil infrastructure is hit. Both sides have now raised the stakes in a mutual escalation framework.
- David Sacks — Trump's AI czar and close ally — publicly calling for "declare victory and get out" is the first White House-adjacent dissent. Reuters reports economic advisers are privately pressing Trump on gasoline prices. The Off-Ramp probability rises marginally.
- US gasoline: \$3.68/gal (AAA, March 15), up \$0.05 from Friday. At current rate, the \$4.00 political red line is approximately 6 days away.

- The Catastrophe scenario becomes more probable: Kharg ultimatum + Iran UAE port threats + 7 KC-135 tankers degraded in 24 hours + internal US hawks pushing ground escalation + Houthi two-strait threat from Alpine Macro. Combined Catastrophe+Quagmire remains above 80%.
- Turkey FM Fidan provided the first concrete diplomatic signal: Iran “may be open to back-channel diplomacy,” though conditions are “not very much conducive.” Trump-Xi summit remains 16 days away.

Bayesian Scenario Probabilities — Day 15 Update

Scenario	Day 1	Day 7	Day 10	Day 15	Primary Driver
Quagmire / Prolonged Attrition	52.3%	~46%	42-46%	29-33%	Kharg ultimatum forces decision; air ops degraded by KC-135 losses; both sides at higher stakes
Catastrophe / Escalation	16.6%	~27%	35-38%	43-48%	Kharg ultimatum + Iran UAE port threats + KC-135 attrition + Houthi two-strait risk + hawks vs Sacks split
Stalemate / Off-Ramp	21.9%	~18%	10-13%	16-20%	Sacks internal pressure + Turkey Fidan backchannel + Kharg leverage creates potential deal structure; Trump-
Quick Win / Regime Change	9.2%	~11%	3-5%	2-3%	Effectively eliminated; regime consolidated under Mojtaba/

Catastrophe is now clearly modal. Combined Catastrophe+Quagmire = ~80%. Off-Ramp has risen from 13-16% to 16-20% — the Kharg coercive framework plus David Sacks signals are the drivers. Source: Bayesian_15Expert_Report.docx; updated with Day 15 evidence.

SECTION 2: WAR CHRONOLOGY — DAY 14-15 UPDATE

2.1 Chronology Table — Days 1-15

Day	US / Israel Actions	Iran / Regional Counter-Strikes
1-2	900 strikes in first 12hrs; Khamenei + 48 officials killed; Natanz/Fordow hit; air defenses targeted	90 ballistic + ~350 drones Day 1; strikes on Israel, Bahrain, Kuwait, Qatar, UAE, Saudi Arabia
3-4	Hezbollah command struck; Iraqi PMF bases hit; IRIS Dena frigate sunk by submarine	Wave 2-5 True Promise 4; Kuwaiti F/A-18 friendly fire; residential areas hit in Israel
5-6	IDF F-35 first air-to-air kill; 80% Iranian air defenses claimed destroyed; B-1 Lancer deployed	553 ballistic + 1,219 drones by Day 7; THAAD radar destroyed in Jordan (\$300M); hotel strikes UAE
7-8	Phase 2: underground TEL targeting; first oil depot strikes Tehran/Alborz	Rate ~35 ballistic/day (down from 350); Khorramshahr-4 hypersonic reported; Bahrain
9-10	Mojtaba confirmed SL; Taleghan nuclear testing site struck	Oil hits \$119 WTI; Iraq production -70%; mines confirmed Hormuz; 3 ships hit March 11
11-12	IEA record 400MB release; US asks Israel to halt energy infrastructure strikes; PJAK Kurdish operations confirmed	IRGC permit regime formalized; Wright tanker hoax; Mojtaba first public statement (via TV anchor, no direct video/audio); 6 vessels hit in Gulf

13	KC-135 crash over Iraq (6 KIA confirmed Day 14); Pentagon confirms girls school strike error; \$10M bounty on Mojtaba and IRGC leaders	US Embassy Baghdad struck (helipad); Pezeshkian 3-condition ceasefire framework; 5 more KC-135 tankers damaged in Saudi Arabia
14	Kharg Island struck: 90+ military targets obliterated; oil infrastructure spared with explicit ultimatum; 2,500 Marines + USS Tripoli ordered to region; IDF 400th wave of strikes (15,000+ total targets)	Iran threatens UAE cities (Jebel Ali, Khalifa, Fujairah) evacuation; Fujairah oil facility fire (drone debris); UAE intercepts 9 ballistic + 33 UAVs; Qatar intercepts 4 ballistic + several drones; Bahrain intercepts 10 drones + 3 missiles
15	Trump asks China, France, Japan, S. Korea, UK to send warships to secure Hormuz; USS Nimitz service extended to March 2027; David Sacks (White House AI czar) calls for 'declare victory and	Iran FM Araghchi: any US company energy infrastructure in region is a target; IRGC Khatam al-Anbiya: 'not one litre' through Hormuz; Iran demands neighbors expel US forces

Sources: Al Jazeera Day 15 live blog, AP, Reuters, Fox News Live, NPR, CNN, CNBC, BBC, Wikipedia 2026 Iran War (live), CENTCOM statements, Fortune, SOF News, GlobalSecurity.org

2.2 Current Force Posture — Day 15

US / Israel	Iran	Regional Spillover
15,000+ targets struck total (Hegseth). IDF 400th wave completed. B-1, B-2, F-35, carrier-based aircraft. KC-135 fleet degraded (6 KIA crash + 5 damaged Saudi strike). 2,500 Marines + USS Tripoli en route (1+ week away). USS Nimitz extended to March	Daily ballistic rate ~35 (stable). 4,400+ military KIA. Navy essentially destroyed. Air defenses 80%+ degraded per US/IDF. Still launching daily drone/missile waves. Kharg military infrastructure hit. Oil infrastructure intact. IRGC Hormuz permit regime in effect.	Lebanon: 773+ dead, 850K+ displaced. Iraq: Basra terminals shut; PMF active; US Embassy Baghdad struck. UAE: evacuations ordered at 3 ports; Fujairah fire. Qatar: 4 ballistic intercepted + drones. Bahrain: 124 ballistic + 203 drones intercepted total. Kuwait:

Force posture as of 0800 ET March 15, 2026. Iraqi PM calling for ceasefire. 10 foreigners detained in UAE for sharing war footage on social media.

SECTION 3: THE KHARG COERCIVE FRAMEWORK — NEW DOMINANT DYNAMIC

The Kharg Island strike on Day 14 is analytically the most significant US action since the first hours of the conflict. It changes the structural logic of the war from attrition to coercive bargaining — but in both directions simultaneously.

3.1 Trump's Explicit Ultimatum

Trump announced: "For reasons of decency, I have chosen NOT to wipe out the Oil Infrastructure on the Island. However, should Iran, or anyone else, do anything to interfere with the Free and Safe Passage of Ships through the Strait of Hormuz, I will immediately reconsider this decision."

This is a coercive offer with a defined trigger. Its logic: Iran reopens Hormuz, US spares Kharg oil facilities, oil prices fall, both sides can claim a form of win. For it to work, three conditions must hold simultaneously:

- Iran's military decision-makers must believe the threat to destroy Kharg oil infrastructure is credible and imminent
- Iran must calculate that losing Kharg oil revenue (~\$20B+/year) outweighs the political cost of partially reopening Hormuz
- Mojtaba Khamenei and the IRGC must have a political off-ramp formula that doesn't look like surrender

All three conditions face significant obstacles.

3.2 Iran's Counter-Threat

"Our Armed Forces have already answered that they would retaliate if our oil and energy infrastructure are attacked. Iran will attack any energy infrastructure in the region which belongs to an American company or an American company is a shareholder."

— FM Abbas Araghchi, March 14, 2026

Iran has explicitly threatened to escalate to US company energy assets across the Gulf if Kharg oil infrastructure is struck. This creates a mutual deterrence dynamic: both sides are threatening each other's energy infrastructure, not just military assets.

Iran's parliament speaker had specifically warned, before the Kharg strike, that hitting Iranian oil infrastructure would "provoke a new level of retaliation." The Kharg military strike (without oil infrastructure damage) was designed to threaten without triggering that response.

3.3 The UAE Threat — First Non-US Target Directly Threatened

Iran's IRGC formally warned residents to evacuate Jebel Ali (the Middle East's busiest port), Khalifa, and Fujairah on Day 15, claiming US forces launched the Kharg strike from UAE territory. This is the first time Iran has directly threatened civilian infrastructure of a neighboring country, not just US military bases.

The strategic significance: UAE civilian infrastructure — including Jebel Ali, through which roughly 30% of all Middle East trade flows — has now been formally placed in Iran's target list. Whether Iran follows through or uses this as a coercive signal is the single most important short-term escalation indicator.

3.4 KC-135 Attrition — Air Operations Under Stress

Within a 24-hour window ending March 14, seven US air refueling aircraft were degraded: 6 KC-135 crew confirmed dead from the March 12 crash (CENTCOM March 14), and 5 additional KC-135 Stratotankers damaged in an Iranian strike on Saudi Arabia (WSJ, March 13). The KC-135 is the workhorse of US long-range strike operations; each B-1 Lancer mission from RAF Fairford requires multiple refueling contacts.

- SOF News assessment: "With two lost in the mid-air collision and these five damaged — all in 24 hours — the Air Tasking Order (ATO) may be downsized quite a bit over the next several days"
- This represents the first meaningful constraint on US offensive air capacity in the conflict
- Iran's missile accuracy against Saudi-based tankers suggests IRGC intelligence on basing locations is more precise than assumed

Total US KIA confirmed at 13: 7 killed by enemy fire, 6 KC-135 crew (crash, not hostile fire per CENTCOM). 140 wounded, 8 severely. 1 French military personnel killed (coalition).

SECTION 4: THE SACKS SIGNAL — INTERNAL US FRACTURE

David Sacks — Trump's AI and cryptocurrency czar, a close ally and South African-born venture capitalist who has been one of the president's most prominent supporters — broke publicly with the administration's war posture on March 13, in an appearance on the All-In Podcast.

4.1 Key Statements

"We've degraded Iranian capabilities massively. This is a good time to declare victory and get out, and that is clearly what the markets would like to see."

— David Sacks, All-In Podcast, March 13, 2026

"They essentially have a dead man's switch over the economic fate of the Gulf states and even potentially beyond that."

— David Sacks, All-In Podcast, March 13, 2026

"If you see that type of destruction continue, you could literally render the Gulf almost uninhabitable. I mean you're not going to have enough water for 100 million people, and human beings just cannot survive very long without water."

— David Sacks (on desalination plant targeting risk), All-In Podcast, March 13, 2026

4.2 Analytical Significance

- Sacks is the first White House-adjacent figure to publicly advocate for de-escalation. Reuters separately confirmed that economic advisers and officials have been privately pressing Trump on gasoline prices as a political risk.
- Sacks specifically identified a “faction, largely but not exclusively in the Republican Party” pushing for escalation, ground troops, and regime change — making the internal administration split visible and named.
- The “dead man’s switch” framing is analytically consistent with our Three-Clock model: Iran does not need to win militarily; it only needs to sustain enough economic disruption to force a US political reversal.
- Sacks also raised the Israeli nuclear escalation scenario, warning that continued Iranian damage could push Israel toward nuclear contemplation — a Catastrophe sub-scenario our model prices at approximately 4-6% conditional on Catastrophe occurring.
- Sacks’ public break is the most significant indicator yet that the Off-Ramp scenario is gathering internal momentum. We revise Off-Ramp probability up from 13-16% to 16-20%.

SECTION 5: THREE-CLOCK ATTRITION FRAMEWORK — DAY 15 UPDATE

Clock 1 — Iran’s Launch Capacity

- Daily ballistic rate: ~35/day (stable since Day 10). Consistent with IDF claim of ~65% TEL destruction.
- Underground missile cities: Critical unknown unchanged. If rate holds at ~35/day into Day 20, it confirms underground capacity is accessible.
- IRGC operator willingness: Larijani: “Unlike the United States, Tehran has prepared itself for a long war.” No confirmed desertion events.
- Remaining inventory estimate: ~1,400 ballistic missiles; drone inventory less constrained.

Clock 2 — US/Israel Interceptor Effectiveness

- Status unchanged from Day 14. THAAD: STRESSED. SM-3: STRESSED. Patriot PAC-3: CRITICAL. Arrow 3: ADEQUATE. Iron Dome: ADEQUATE.
- KC-135 degradation does not directly affect interceptor stocks but reduces offensive strike tempo, indirectly allowing Iran more time to reconstitute TEL positions.
- UAE intercepts 9 ballistic + 33 UAVs in single day (March 14) — Gulf state interceptor consumption continues at high rate.

Clock 3 — Economic and Political Patience (DOMINANT)

Indicator	Day 14	Day 15	Threshold / Note
Brent crude	~\$101	~\$104	Wood Mackenzie: \$150 needed for demand destruction. IRGC: “expect \$200”
WTI crude	~\$95	~\$98	IEA 400MB release covers only ~15% of supply gap

US retail gasoline	~\$3.63	\$3.68	\$4.00 red line ~6 days away at current rate. Diesel already \$4.51.
Iraq production	-70%	Terminals shut	All terminal operations halted after tanker strikes
Qatar LNG	Halted	Halted	Ras Laffan + Mesaieed; ~20% global LNG
Supply gap (bbl/day)	15-18M	~15-18M	9M bpd permanently bottlenecked until Hormuz reopens (Rystad)
SPR release efficacy	400MB pledged	1.4M bpd	Covers 15% of gap; takes 13 days to reach market
US war cost	~\$12B Week 1	~\$891M/day	Congressional supplemental funding battle pending
Quinnipiac poll	53% oppose	No new data	60% independents oppose; Republican Senate seats at risk

IEA release math: 400MB over 120 days = 1.4M bpd. Supply gap: ~15-18M bpd. Coverage: ~15%. Source: CNBC/Rystad, March 14, 2026.

SECTION 6: DIPLOMATIC LANDSCAPE — DAY 15

6.1 Turkey Fidan Backchannel (NEW)

AP exclusive interview with Turkish FM Hakan Fidan, March 14: Iran “may be open to back-channel diplomacy” with the United States. Fidan described conditions as “not very much conducive” and said Iranian leaders “feel betrayed” after being attacked while negotiating. He said there is “no serious effort underway to restart formal negotiations” but confirmed Turkey is maintaining lines of communication with Tehran.

Analytical significance: Turkey is a NATO member with ongoing diplomatic relations with Iran and is ideally positioned as a back-channel intermediary. Turkey has also had Iranian missiles intercepted over its territory, giving it a direct stake in de-escalation. The Fidan signal is the first concrete diplomatic opening from a credible intermediary since the Pezeshkian three-conditions offer on Day 12-13.

6.2 Trump-Xi Summit — 16 Days

- Trump-Xi summit scheduled March 31-April 2, now 16 days away.
- Trump asked China, France, Japan, South Korea, and UK to send warships to secure Hormuz. China has not responded. UK said it is “discussing range of options.”
- Wang Yi and Witkoff back-channel: still active. No confirmed draft framework.
- If the Kharg ultimatum is Iran’s coercive offer (reopen Hormuz in exchange for oil infrastructure survival) and Turkey/China broker a face-saving formula, the Trump-Xi summit becomes a natural venue for a deal announcement.

6.3 Iran Internal Signals

- Pezeshkian three conditions: still on the table (recognition of rights, reparations, binding guarantees).
- Mojtaba Khamenei: still not seen in person. First statement read by TV anchor. Health status unclear. IRGC is operationally running the war.
- Araghchi (FM): hardline on energy retaliation, but “all diplomatic options remain open” per back-channel reports.
- Larijani: “Trump doesn’t understand that the Iranian nation is strong, determined, and resilient.”

6.4 Russia and China

Actor	Current Actions	Strategic Calculation
Russia	Providing satellite imagery. Medicine airlift to Iran (13+ metric tons, IL-76). Kremlin: energy market stabilization “being discussed” with Washington. Pledged ‘unwavering support’ for	Benefits from US distraction. Watching for European redeployment opportunity. Treasury sanctioned-tanker authorization allows Russian oil sales — direct benefit.
China	Wang Yi “should never have happened.” Special envoy dispatched. Not responding to Trump warship request. Imports ~5M bpd through Hormuz. Araghchi confirmed China as “strategic	Hormuz closure is direct Chinese economic injury. Trump-Xi summit prep creates maximum leverage window. Most credible ceasefire broker. Has not signaled willingness to act

SECTION 7: ENERGY AND ECONOMIC ASSESSMENT — DAY 15

7.1 Market Dynamics

Oil markets are in a new structural phase. The IEA’s record 400MB release failed to move prices down materially. The simple math: 400MB over 120 days = 1.4M bpd. The supply gap is 15-18M bpd. The release covers approximately 15% of the shortfall. It “buys time, but does not solve the crisis” (Bernstein).

- Rystad Energy: 9M bpd permanently bottlenecked until Hormuz reopens. Pipelines can handle only ~5-6M bpd of Saudi/UAE/Kuwait/Iraq exports.
- Wood Mackenzie (Chairman Simon Flowers): “Supply volumes at risk this time are dimensionally bigger — and real. In our view, US\$200/bbl is not outside the realms of possibility in 2026.”
- Wood Mackenzie: \$150/bbl needed for demand destruction to rebalance market without supply resumption.
- Alpine Macro (Dan Alamariu): “Peak war panic likely to hit financial markets in 1-3 weeks.” Warns Houthi Red Sea closure would compound the shock with additional 5M bpd.
- Urea prices: up 35% since February 28 (fertilizer supply shock from Hormuz closure). One-third of global urea transits Hormuz. Food inflation downstream consequence.
- US war cost: Week 1 = ~\$12B. Day rate = ~\$891M. Congressional supplemental funding battle expected.

7.2 The \$4.00 Gasoline Clock

Date	US Regular (AAA)	Change	Political Signal
Feb 28 (Day 1)	\$2.98	Baseline	Normal pre-war conditions
Mar 7 (Day 8)	~\$3.41	+\$0.43	G7 emergency meeting triggered
Mar 12 (Day 13)	\$3.57	+\$0.59	Quinnipiac: 53% oppose war
Mar 14 (Day 15)	\$3.68	+\$0.70	\$4.00 red line ~6 days away at \$0.05-0.07/day rate
~Mar 21 (est.)	~\$4.00	+\$1.02	Political red line: Trump approval impact accelerates exponentially above this level
2022 peak (Ukraine)	\$5.02	Reference	Cost Democrats the House. Current trajectory exceeds 2022 pace.

Diesel already at \$4.51/gal nationally (PBS, March 8). San Francisco regular at \$6.50/gal (TIME, March 12). Sources: AAA daily, CNBC, PBS NewsHour.

SECTION 8: PREDICTION MARKET ANALYSIS — DAY 15

8.1 Updated Mispricings

Market	Poly	Bayes Est.	CI	Edge	Conviction / Change
Mojtaba as leader Dec 31	~55%	70-75%	[58%,82%]	LONG +15-20pts	VERY HIGH. Poly has risen from 27% as market catches up. Still underpriced vs IRGC loyalty pledge.
Regime fall before 2027	~28%	10-14%	[7%,20%]	SHORT +14-18pts	VERY HIGH. NIC report + IRGC cohesion + Mojtaba appointment. Market slowly converging.
Ceasefire by March 31	~28%	10-14%	[5%,22%]	SHORT +14-18pts	HIGH. Mojtaba + Larjani both signal no talks. Trump: “not a deal I would accept.” 16 days to summit.
Regime fall by March 31	~10%	2-4%	[1%,8%]	SHORT +6-8pts	VERY HIGH. 16 days remaining; IRGC loyal. Market nearly converged.
Ceasefire by June 30	~52%	38-46%	[26%,58%]	SHORT +6-14pts	MODERATE. Wider CI. Sacks + Turkey + Kharg framework modestly improve long-term off-ramp but Mojtaba remains hardline.
Oil above \$120 before April	~44%	50-60%	[38%,72%]	LONG +6-16pts	MODERATE. Wood Mackenzie \$150 demand destruction threshold; Iran UAE threats create additional supply risk premium.

All Polymarket prices approximate as of March 15, 2026. Insider trading risk: same caution applies. Priority markets: Mojtaba LONG (\$9M+ volume) and regime fall SHORT remain highest-conviction positions. Source: Bayesian framework + Day 15 evidence.

SECTION 9: KEY UNCERTAINTIES — RANKED BY IMPACT

#	Uncertainty	Modal	Scenario Impact	Resolution Indicator
1	Does Iran follow through on UAE port threat?	No immediate attack; coercive signal only	Catastrophe +15pp if Jebel Ali or Khalifa struck	24-48hr window critical; UAE defense posture; Iran IRGC statements
2	Does Trump order Kharg oil infrastructure struck?	Holding as leverage; waiting for Hormuz	Catastrophe +15pp; triggers Iran energy retaliation across Gulf	Iran Hormuz compliance rate; Trump Truth Social signals; CENTCOM orders
3	Houthi entry into Red Sea war	Holding back; drilling not engaged	Catastrophe +10pp; two-strait disruption = additional 5M bpd lost	Houthi leadership statements; Red Sea attack rates; Iran-Houthi communications
4	Sacks effect: does Trump shift toward off-ramp?	Trump maintains current posture; Sacks is outlier	Off-Ramp +10pp if Trump signals flexibility; Catastrophe +8pp if hawks win and ground option authorized	Trump Truth Social tone; Hegseth/Rubio language; Witkoff back-channel activity

5	Turkey Fidan backchannel materializes into talks	Active but no framework yet; conditions 'not conducive'	Off-Ramp +8pp if concrete framework; Off-Ramp -5pp if Iran publicly rejects Turkey mediation	Fidan-Araghchi communications; Witkoff-Fidan contact; Wang Yi statements
6	USS Tripoli/31st MEU deployment purpose	Embassy security + contingency; not invasion force	Catastrophe +10pp if Kharg Island landing ordered	SECDEF statements; force posture on arrival; Trump ground troop signals
7	Mojtaba actual health/decision-making capacity	Seriously injured; IRGC running operations; possible leg	Off-Ramp +5pp if confirmed incapacitated (civilian faction gains leverage)	State TV; absence from communications; IRGC behavior
8	Oil above \$4.00 retail gasoline: Trump political reversal	~6 days at current rate; Trump currently	Off-Ramp +8pp if first polling shows Republican Senate risk	AAA daily; Trump approval; Republican Senate pressure; Massie-Khanna AUMF

SECTION 10: STRATEGIC CONCLUSIONS — DAY 15

The Kharg coercive framework is the most significant strategic development of the conflict so far.

By striking Kharg military targets while deliberately preserving oil infrastructure and explicitly linking that preservation to Hormuz reopening, Trump has created the first concrete coercive mechanism of the conflict. Both sides now hold each other's energy infrastructure at risk. This is simultaneously the most plausible pathway to a negotiated exit and the most dangerous escalation pressure point.

Iran's UAE port threat is a direct escalation response.

Within hours of the Kharg strike, Iran formally threatened civilian infrastructure in a neighboring state for the first time. Jebel Ali handles roughly 30% of all Middle East trade. If Iran follows through, the conflict crosses a new threshold. If it does not, the threat is revealed as a bluff — which would materially weaken Iran's deterrent posture.

David Sacks is the most important new variable for the Off-Ramp scenario.

A White House insider, close Trump ally, and credible economic voice publicly calling for "declare victory and get out" is the first visible internal pressure for de-escalation. Combined with Reuters reporting of private adviser pressure on gasoline prices, the internal administration balance is shifting. The question is whether this reaches Trump before he crosses either the \$4.00 gasoline threshold or orders Kharg oil infrastructure struck.

THE BOTTOM LINE: The next 6 days are the most consequential of the conflict. Watch: (1) Does Iran attack UAE civilian ports or does the threat remain a signal? (2) Does Trump order Kharg oil infrastructure struck if Hormuz stays closed? (3) Does the \$4.00 gasoline level trigger measurable Republican Senate pressure on Trump? These three events — any one of which could occur in the next 72-144 hours — will determine whether this conflict escalates into catastrophe, or whether the Sacks/Turkey/Kharg bargaining framework produces an off-ramp.

END OF REPORT — APPENDICES FOLLOW

Strategic Intelligence & Bayesian Assessment Consortium • Day 15 • March 15, 2026

Sources: AP, Reuters, Fox News Live, Al Jazeera, CNN, CNBC, BBC, NPR, NBC News, Fortune, The Hill, SOF News, Time, CBS News, Washington Post, GlobalSecurity.org, Wikipedia 2026 Iran War (live), CENTCOM, IEA, Wood Mackenzie, Rystad Energy, Alpine Macro, AAA, Polymarket, Quinnipiac, WSJ, Newsweek, Gulf News, Benzinga, Raw Story, All-In Podcast (Sacks statements), Hengaw Human Rights Organization

APPENDIX A

15-EXPERT PANEL — COMPLETE PREDICTION AUDIT

This appendix contains the complete raw data underlying all expert accuracy weights. 113 scored historical predictions (2015–2025). Bayesian Beta-posterior model. Without this data the accuracy weights cited in this report cannot be independently verified.

A.1 Scoring Methodology

Each prediction is scored: TRUE=1.0, MOSTLY TRUE=0.75, PARTIAL=0.50, MOSTLY FALSE=0.25, FALSE=0.00. Beta posterior: Jeffreys prior Beta(0.5,0.5). $E[p] = \alpha/(\alpha+\beta)$. Aggregation: 100,000 Monte Carlo draws. Correlation matrix: FDD cluster (0.45–0.60), realist cluster (0.40–0.50). Effective independent experts: 10.13/15. Extremizing factor $d=0.675$ (Satopaa et al. 2014).

A.2 Expert Accuracy Summary

Expert	Affiliation	N	Sum Scores	Alpha	Beta	E[p]	Camp	Key Domain
Mearsheimer	U. Chicago	8	7.25	7.75	1.25	0.861	Dovish	Grand strategy
Vaez	Crisis Group	6	5.25	5.75	1.25	0.821	Dovish	Iran domestic
Kinzer	Boston Univ	7	5.75	6.25	1.75	0.781	Dovish	Intervention hist.
Bajoghli	Johns Hopkins	5	4.00	4.50	1.50	0.750	Dovish	IRGC sociology
Ben Taleblu	FDD	7	5.25	5.75	2.25	0.719	Hawkish	Missiles/ drones
Sachs	Columbia	8	5.50	6.00	3.00	0.667	Dovish	Conflict costs
Takeyh	CFR	8	5.50	6.00	3.00	0.667	Hawkish	Iranian military
Schanzer	FDD	7	4.75	5.25	2.75	0.656	Hawkish	Axis of resistance
Dubowitz	FDD CEO	8	5.25	5.75	3.25	0.639	Hawkish	Sanctions/ strategy
Crooke	Conflicts Forum	8	5.00	5.50	3.50	0.611	Dovish	Resistance axis
Friedman	Geopolit. Futures	9	5.25	5.75	4.25	0.575	Other	Grand strategy
Rubin	AEI / MEF	8	4.00	4.50	4.50	0.500	Hawkish	Rogue regimes
Ritter	Ex-UNSCOM	9	3.25	3.75	6.25	0.375	Dovish	Military ops
Gerecht	FDD / Ex-CIA	8	2.50	3.00	6.00	0.333	Hawkish	Regime change
Molyneux	Independent	7	0.50	1.00	7.00	0.125	Other	Western decline

Dovish avg: 0.695 | Hawkish avg: 0.586 | Other: 0.350. Source: Bayesian_15Expert_Report.docx (March 1, 2026)

A.3 Complete 113-Prediction Track Record

MEARSHEIMER — E[p]=0.861 — 8 predictions — Dovish/Realist				
Prediction	Year	Score	Verdict	Category
NATO expansion would provoke Russian aggression vs Ukraine	2014	1.00	TRUE	Geopolitical
Iraq War would be a strategic disaster / quagmire	2003	1.00	TRUE	Military
Israel lobby shapes US Mideast policy detrimentally	2006	0.75	MOSTLY TRUE	Geopolitical
US pivot to Asia disrupted by Middle East entanglements	2012	0.75	MOSTLY TRUE	Geopolitical
Libya intervention would create failed state / chaos	2011	1.00	TRUE	Military
Ukraine conflict would become prolonged war of attrition	2022	1.00	TRUE	Military
Great power competition (US-China) is the defining dynamic	2018	0.75	MOSTLY TRUE	Geopolitical
US would not deter Russia from invading Ukraine	2021	1.00	TRUE	Military

VAEZ — E[p]=0.821 — 6 predictions — Dovish/Crisis Group				
Prediction	Year	Score	Verdict	Category
Framework leading to 2015 JCPOA nuclear deal	2013-15	0.75	MOSTLY TRUE	Nuclear
US withdrawal from JCPOA would accelerate Iranian enrichment	2018	1.00	TRUE	Nuclear
Iranian protests met with crackdown but regime would not be toppled	2019	1.00	TRUE	Regime
Maximum pressure sanctions fail to change Iranian regime behavior	2019	1.00	TRUE	Economic
Diplomacy still possible after Soleimani killing	2020	0.50	PARTIAL	Geopolitical
Iran would accelerate nuclear program after JCPOA collapse	2019	1.00	TRUE	Nuclear

KINZER — E[p]=0.781 — 7 predictions — Dovish/Boston Univ				
Prediction	Year	Score	Verdict	Category
1953 coup blowback pattern repeats in future US interventions	2003+	1.00	TRUE	Geopolitical
Iraq invasion follows failed regime change pattern	2003	1.00	TRUE	Military
US regime changes consistently produce worse outcomes than status quo	2006	0.75	MOSTLY TRUE	Geopolitical
Turkey and Iran as natural long-term US partners (Reset thesis)	2010	0.25	MOSTLY FALSE	Geopolitical
Libya intervention would create chaos	2011	1.00	TRUE	Military
US-Iran hostility rooted in 1953 continues to poison relations	2003+	1.00	TRUE	Geopolitical
US would eventually attempt military action against Iran	2006	0.75	MOSTLY TRUE	Military

BAJOGHLI — E[p]=0.750 — 5 predictions — Dovish/Johns Hopkins				
Prediction	Year	Score	Verdict	Category
Internal regime anxiety about youth legitimacy crisis is real	2019	0.75	MOSTLY TRUE	Regime
Sanctions hurt Iranian civilians more than regime elites	2022	1.00	TRUE	Economic
Mahsa Amini protests represent deep structural legitimacy crisis	2022	0.75	MOSTLY TRUE	Regime
IRGC internal dynamics more fractured than analysts assume	2019	0.75	MOSTLY TRUE	Regime
Sanctions would not change regime behavior on nuclear program	2022	0.75	MOSTLY TRUE	Nuclear

BEN TALEBLU — E[p]=0.719 — 7 predictions — Hawkish/FDD

Prediction	Year	Score	Verdict	Category
JCPOA sunset would enable Iran nuclear expansion after 2025	2015-18	0.75	MOSTLY TRUE	Nuclear
Iran would transfer drones/missiles to Russia after arms embargo lifted	2020	1.00	TRUE	Military
Iran ballistic missiles represent growing threat requiring Western attention	2018	0.75	MOSTLY TRUE	Military
Iran cruise missile capability underestimated by the West	2019	0.75	MOSTLY TRUE	Military
Houthi missile capabilities pose genuine regional threat	2018	1.00	TRUE	Military
Maximum pressure would alter regime's cost-benefit calculation	2019	0.25	MOSTLY FALSE	Economic
IRGC-Quds Force network requires kinetic + financial targeting	2020	0.75	MOSTLY TRUE	Geopolitical

SACHS — E[p]=0.667 — 8 predictions — Dovish/Columbia				
Prediction	Year	Score	Verdict	Category
Iraq sanctions cause humanitarian catastrophe without regime change	1990s	1.00	TRUE	Economic
Shock therapy would succeed in Poland	1990	0.75	MOSTLY TRUE	Economic
Shock therapy would succeed in Russia similarly to Poland	1992	0.25	MOSTLY FALSE	Economic
Iraq War would destabilize Middle East broadly	2003	1.00	TRUE	Military
US sanctions on Iran hurt civilians without changing regime behavior	2018	1.00	TRUE	Economic
Multipolar world order emerging, reducing US unilateral power	2020	0.75	MOSTLY TRUE	Geopolitical

Ukraine conflict could escalate toward nuclear confrontation	2022	0.25	MOSTLY FALSE	Military
COVID origins debate suppressed then vindicated (lab leak)	2021	0.50	PARTIAL	Geopolitical

TAKEYH — E[p]=0.667 — 8 predictions — Hawkish/CFR

Prediction	Year	Score	Verdict	Category
JCPOA sunset provisions leave Iran well-positioned for nuclear breakout	2015	0.75	MOSTLY TRUE	Nuclear
Iran defense budget would double post-JCPOA; regional aggression increase	2017	0.75	MOSTLY TRUE	Military
Snapback sanctions would never actually be implemented	2015	0.25	MOSTLY FALSE	Economic
Iran a revolutionary state; normal negotiations won't produce results	2015	0.75	MOSTLY TRUE	Geopolitical
Sanctions not crippling Iran; resistance economy survives	2022	0.75	MOSTLY TRUE	Economic
Regime is multi-layered; bombing alone won't topple it	2026	0.75	MOSTLY TRUE	Regime
Air power can destroy nuclear/missile programs but Iran rebuilds	2026	0.75	MOSTLY TRUE	Military
Killing Khamenei creates confusion but doesn't ensure regime change	2025-26	0.75	MOSTLY TRUE	Regime

SCHANZER — E[p]=0.656 — 7 predictions — Hawkish/FDD

Prediction	Year	Score	Verdict	Category
Hamas-Fatah split is fundamental obstacle to Palestinian statehood	2008	0.75	MOSTLY TRUE	Geopolitical

Iran's 'ring of fire' strategy to strangle Israel is a strategic reality	2023	0.75	MOSTLY TRUE	Military
JCPOA sanctions relief yields financial boon for Hamas and proxies	2021	0.75	MOSTLY TRUE	Geopolitical
Turkey's HTS support makes it an unreliable NATO ally	2024	0.75	MOSTLY TRUE	Geopolitical
Iran's axis of resistance weakened but not eliminated after Israeli strikes	2024	0.75	MOSTLY TRUE	Military
Houthi Red Sea threat requires decisive military response	2024	0.50	PARTIAL	Military
Assad regime is enduring (pre-December 2024 fall)	2013-23	0.50	PARTIAL	Regime

DUBOWITZ — E[p]=0.639 — 8 predictions — Hawkish/FDD CEO				
Prediction	Year	Score	Verdict	Category
JCPOA fatally flawed; sunset provisions create patient path to the bomb	2015	0.75	MOSTLY TRUE	Nuclear
Maximum pressure sanctions would bring Iran to the negotiating table	2018	0.25	MOSTLY FALSE	Economic
Iran sanctions can choke regime revenue if properly enforced	2018	0.50	PARTIAL	Economic
Soleimani killing wouldn't trigger 'World War Three'	2020	1.00	TRUE	Military
JCPOA sanctions relief funds Iran proxies (Hezbollah, Hamas)	2015	0.75	MOSTLY TRUE	Geopolitical
Iran's rial collapse signals regime economic vulnerability	2018-25	0.75	MOSTLY TRUE	Economic
Max pressure + max support empowers Iranians to dismantle regime	2020	0.25	MOSTLY FALSE	Regime
Biden admin lax enforcement enabled Iran oil revenue surge	2021-24	1.00	TRUE	Economic

CROOKE — E[p]=0.611 — 8 predictions — Dovish/Ex-MI6				
Prediction	Year	Score	Verdict	Category
Hamas election victory dynamics / Western miscalculation	2006	1.00	TRUE	Geopolitical
Hezbollah survives 2006 Lebanon War and emerges stronger	2006	1.00	TRUE	Military
Western intervention in Syria empowers jihadist groups	2012	1.00	TRUE	Military
Assad regime would survive (with Russian/Iranian support)	2013-23	0.50	PARTIAL	Regime
Resistance axis is durable and strategically coherent	2020	0.25	MOSTLY FALSE	Geopolitical
Hezbollah's existence not in question after Nasrallah killed	2024	0.25	MOSTLY FALSE	Military
Syria in much better place by end of 2017	2017	0.25	MOSTLY FALSE	Geopolitical
US Syria strikes emotionally driven with lasting negative consequences	2017	0.75	MOSTLY TRUE	Military

FRIEDMAN — E[p]=0.575 — 9 predictions — Other/Geopolitical Futures				
Prediction	Year	Score	Verdict	Category
US-jihadist conflict would define post-9/11 era	2001	0.75	MOSTLY TRUE	Military
Russia would reassert regional power in former Soviet space	2009	1.00	TRUE	Geopolitical
EU structural crisis and fragmentation pressures would intensify	2011	0.75	MOSTLY TRUE	Geopolitical
Japan-China tensions would intensify over territorial disputes	2011	0.50	PARTIAL	Geopolitical
Turkey would emerge as major regional power	2009	0.50	PARTIAL	Geopolitical
Poland would become key European power by 2030s	2009	0.25	MOSTLY FALSE	Geopolitical

US remains dominant through 2020s despite decline narratives	2011	0.75	MOSTLY TRUE	Geopolitical
Major US-Mexico tensions over immigration/border	2009	0.75	MOSTLY TRUE	Geopolitical
Major US-Japan military tensions by 2050	2009	0.00	FALSE	Military

RUBIN — E[p]=0.500 — 8 predictions — Hawkish/AEI-MEF				
Prediction	Year	Score	Verdict	Category
Iraq regime change would benefit regional stability	2002-03	0.00	FALSE	Military
Engaging rogue regimes like Iran is dangerous and counterproductive	2014	0.50	PARTIAL	Geopolitical
Chalabi as reliable US partner in post-Saddam Iraq	2003	0.00	FALSE	Geopolitical
Military strikes alone insufficient; regime itself is the problem	2012	0.75	MOSTLY TRUE	Nuclear
Turkey under Erdogan increasingly hostile to US interests	2015	1.00	TRUE	Geopolitical
Iranian regime won't moderate through diplomacy	2007	0.75	MOSTLY TRUE	Regime
Kurdish forces key US allies deserving of state support	2014-19	0.75	MOSTLY TRUE	Military
Obama admin more antagonistic to Israel than to rogue states	2014	0.25	MOSTLY FALSE	Geopolitical

RITTER — E[p]=0.375 — 9 predictions — Dovish/Ex-UNSCOM				
Prediction	Year	Score	Verdict	Category
Iraq had no significant WMD stockpiles (pre-2003 invasion)	2002	1.00	TRUE	Nuclear
Iraq War would not be quick or easy victory	2003	0.50	PARTIAL	Military

US couldn't take Baghdad / would leave with tail between legs	2003	0.25	MOSTLY FALSE	Military
Imminent US attack on Iran forecast for June 2005	2005	0.00	FALSE	Military
Syria al-Kibar not a nuclear facility	2007	0.00	FALSE	Nuclear
Decisive Russian military victory in Ukraine in 2023	2023	0.25	MOSTLY FALSE	Military
Ukraine suffering unsustainable losses and cannot win	2022	0.50	PARTIAL	Military
Denied Russian responsibility for Bucha massacre	2022	0.00	FALSE	Geopolitical
Russian economy would survive Western sanctions	2022	0.75	MOSTLY TRUE	Economic

GERECHT — E[p]=0.333 — 8 predictions — Hawkish/FDD-Ex CIA				
Prediction	Year	Score	Verdict	Category
Iraq War won't destabilize the Middle East	2002	0.00	FALSE	Military
US invasion of Iraq would provoke democratic revolution in Iran	2002	0.00	FALSE	Regime
Iran is in no shape for prolonged confrontation with US	2019	0.25	MOSTLY FALSE	Military
Iranian middle class/youth have given up on regime; will welcome change	2019	0.50	PARTIAL	Regime
Negotiations with Iran are illusion; time for diplomacy shrinking fast	2007	0.25	MOSTLY FALSE	Nuclear
Afghanistan intervention against Taliban was justified and necessary	2001	0.75	MOSTLY TRUE	Military
Petraeus surge was succeeding in Iraq	2007	0.50	PARTIAL	Military
Pro-Iranian proxies in Iraq can be eradicated completely	2026	0.25	MOSTLY FALSE	Military

MOLYNEUX — E[p]=0.125 — 7 predictions — Other/Independent YouTube				
Prediction	Year	Score	Verdict	Category
Western civilization collapse imminent due to immigration	2015-19	0.00	FALSE	Geopolitical
Trump would transform US foreign policy away from interventionism	2016	0.25	MOSTLY FALSE	Geopolitical
Brexit would trigger EU collapse within years	2016	0.00	FALSE	Geopolitical
Mass social breakdown in Sweden/Germany from migration	2017	0.25	MOSTLY FALSE	Regime
Canadian economy collapse under Trudeau	2017	0.00	FALSE	Economic
Iran deal withdrawal leads to quick Iranian capitulation	2018	0.00	FALSE	Geopolitical
Red wave in US midterms 2022	2022	0.00	FALSE	Geopolitical

113 total predictions. TRUE=1.0, MOSTLY TRUE=0.75, PARTIAL=0.50, MOSTLY FALSE=0.25, FALSE=0.00.
 Source: Bayesian_15Expert_Report.docx (March 1, 2026)

APPENDIX B

23-EXPERT MILITARY PANEL — RAW DATA

Raw data from *Bayesian_Military_Assessment.docx* (March 1, 2026). 23 analysts. Two questions: (1) missile/interceptor attrition balance, (2) Strait of Hormuz closure scenarios. Feeds Section 5 Three-Clock Framework.

B.1 Military Panel Expert Profiles

Expert	Affiliation	Camp	Military Focus	N	Acc.	Beta Posterior	Kappa
Ben Taleblu	FDD Iran Program	Hawk	Missiles/drones	5	0.72	B(4.1, 1.9)	14
Eyal Pinko	Bar Ilan/Ex-Navy	Hawk	Interceptor attrition	3	0.70	B(2.6, 1.4)	14
Sidharth Kaushal	RUSI Senior Fellow	Indep.	Naval/missile defense	6	0.75	B(5.0, 2.0)	14
Jack Watling	RUSI Senior Fellow	Indep.	Russian arms to Iran	4	0.73	B(3.4, 1.6)	14
Wes Rumbaugh	CSIS Missile Defense	Indep.	Interceptor stockpiles	5	0.72	B(4.1, 1.9)	14
Ehud Eilam	Israeli Def. Analyst	Hawk	IDF attrition	4	0.68	B(3.2, 1.8)	13
Mearsheimer	U. Chicago	Dove	Grand strategy	8	0.86	B(7.4, 1.6)	15
Vaez	Crisis Group	Dove	Iran diplomacy	6	0.82	B(5.4, 1.6)	15
Takeyh	CFR Senior Fellow	Hawk	Iranian military	8	0.67	B(5.8, 3.2)	13
Schanzer	FDD Exec Director	Hawk	Axis of resistance	7	0.66	B(5.1, 2.9)	13
Dubowitz	FDD CEO	Hawk	Sanctions/strategy	8	0.64	B(5.6, 3.4)	13
Gerecht	FDD / Ex-CIA	Hawk	Regime vulnerabilities	8	0.33	B(3.2, 5.8)	11
Ritter	Ex-UNSCOM	Dove	Military ops	9	0.38	B(3.9, 6.1)	11
Crooke	Conflicts Forum/MI6	Dove	Resistance axis	8	0.61	B(5.4, 3.6)	13
Eugene Gholz	UT Austin/ Strauss	Indep.	Hormuz campaign	5	0.74	B(4.2, 1.8)	14
Jennifer Kavanagh	Defense Priorities	Dove	US defense trade-offs	4	0.71	B(3.3, 1.7)	14
Bob McNally	Rapidan Energy	Indep.	Oil/Hormuz economics	3	0.69	B(2.6, 1.4)	14
Samuel Bendett	CNAS Fellow	Indep.	Drones/ autonomous	4	0.71	B(3.3, 1.7)	14
Tal Inbar	Missile Def. Advocacy	Hawk	Interceptor economics	5	0.70	B(4.0, 2.0)	14

Alex Plitsas	Atlantic Council	Indep.	Iran retaliation	3	0.68	B(2.5, 1.5)	13
Dmitriy Shapiro	FDD Analyst	Hawk	Russia-Iran arms	4	0.66	B(3.1, 1.9)	13
George Friedman	Geopolitical Futures	Other	Grand strategy	9	0.57	B(5.7, 4.3)	13
Jeffrey Sachs	Columbia/UN Advisor	Dove	Conflict costs	8	0.67	B(5.8, 3.2)	13

Camp: 8 Dovish, 9 Hawkish, 6 Independent. Avg military accuracy: Dovish 0.669 | Hawkish 0.642 | Independent 0.710. Effective independent experts: 14.7/23. Factor d=0.638.

B.2 Assessment 1 — Attrition Balance

Question: Which side depletes first? Outcome A = Iran. Outcome B = US/IL interceptors.

Expert	Camp	P(Iran 1st)	P(US/IL)	Key Reasoning
Ben Taleblu	Hawk	0.72	0.28	US resupply advantage decisive; Iran production sites
Pinko	Hawk	0.55	0.45	Thousands of missiles vs finite interceptors — close race
Kaushal	Indep.	0.42	0.58	US industrial base cannot replace THAAD fast enough; China strategic winner
Watling	Indep.	0.45	0.55	Russian tech transfers improve Iranian survivability
Rumbaugh	Indep.	0.48	0.52	THAAD depletion takes 4-8 years to fix; production bottleneck real
Eilam	Hawk	0.50	0.50	Scarce THAAD but strong Israeli offensive destroying
Mearsheimer	Dove	0.35	0.65	Attrition favors defender in asymmetric conflicts; US overextended
Vaez	Dove	0.40	0.60	Iran reconstituted to ~2,000 MRBMs; interceptor gap is real
Takeyh	Hawk	0.62	0.38	US/IL offensive destroys launchers faster than Iran rebuilds
Schanzer	Hawk	0.65	0.35	Ring of fire weakened; US logistics superior; air supremacy holds
Dubowitz	Hawk	0.70	0.30	Israel burns money not capability; Iran missile doctrine is to deter not deliver
Gerecht	Hawk	0.78	0.22	Iran in no shape for prolonged confrontation with US
Ritter	Dove	0.25	0.75	US cannot sustain indefinite interceptor expenditure; Iran asymmetric Gulf capabilities
Crooke	Dove	0.30	0.70	Resistance axis durable; Iran mine-laying even under suppression
Gholz	Indep.	0.52	0.48	Iran capacity significantly limited by self-deterrence; close race overall
Kavanagh	Dove	0.38	0.62	Indo-Pacific trade-offs make sustained Middle East defense untenable
McNally	Indep.	0.55	0.45	Selective strikes keep US expenditure manageable; oil spike forces Iran's hand
Bendett	Indep.	0.50	0.50	Drone economics favor attacker at \$35K vs \$15M interceptor; coin flip

Inbar	Hawk	0.58	0.42	Defense costlier but prevented damage has irreplaceable
Plitsas	Indep.	0.47	0.53	Iran holding reserves in underground cities prolongs offensive capacity
Shapiro	Hawk	0.68	0.32	US air superiority; Iran exposed on surface
Friedman	Other	0.60	0.40	Iran doctrine designed to deter not deliver; missiles diminish in value once fired
Sachs	Dove	0.33	0.67	US cannot afford sustained ops; costs mount; Iran resilient
CONSENSUS	All	49.8%	50.2%	Coin flip: 49.8% vs 50.2%. Hawks avg A=0.64, Doves avg B=0.64, Independents split. 95% HDI: [38.4%, 61.8%]

B.3 Assessment 2 — Hormuz Closure Dirichlet Vectors

S1=Partial/Short (<2wks), S2=Partial/Medium (2-8wks), S3=Partial/Long (>8wks), S4=Full/Short, S5=Full/Medium, S6=Full/Long, None=No closure. Vectors sum to 1.0.

Expert	Camp	S1	S2	S3	S4	S5	S6	None
Ben Taleblu	Hawk	.12	.08	.03	.10	.05	.02	.60
Pinko	Hawk	.18	.12	.05	.12	.08	.03	.42
Kaushal	Indep.	.22	.15	.08	.08	.05	.02	.40
Watling	Indep.	.20	.14	.07	.10	.06	.03	.40
Rumbaugh	Indep.	.18	.12	.06	.08	.05	.02	.49
Eilam	Hawk	.15	.10	.05	.12	.06	.02	.50
Mearsheimer	Dove	.22	.18	.10	.08	.05	.02	.35
Vaez	Dove	.25	.15	.06	.10	.05	.02	.37
Takeyh	Hawk	.15	.10	.05	.10	.06	.02	.52
Schanzer	Hawk	.15	.10	.04	.10	.05	.02	.54
Dubowitz	Hawk	.12	.08	.03	.10	.05	.02	.60
Gerecht	Hawk	.10	.05	.02	.08	.03	.01	.71
Ritter	Dove	.20	.18	.12	.10	.08	.05	.27
Crooke	Dove	.22	.18	.12	.08	.08	.05	.27
Gholz	Indep.	.25	.12	.04	.05	.03	.01	.50
Kavanagh	Dove	.22	.15	.08	.08	.05	.02	.40

McNally	Indep.	.25	.15	.06	.10	.06	.02	.36
Bendett	Indep.	.20	.12	.05	.08	.04	.02	.49
Inbar	Hawk	.18	.12	.06	.10	.06	.02	.46
Plitsas	Indep.	.22	.15	.08	.10	.06	.03	.36
Shapiro	Hawk	.14	.08	.03	.10	.05	.02	.58
Friedman	Other	.18	.12	.05	.08	.05	.02	.50
Sachs	Dove	.22	.18	.10	.08	.06	.03	.33
CONSENSUS	All	19.1%	12.8%	6.2%	9.2%	5.4%	3.8%	43.5%

None=43.5% (modal). Any partial=38.1%. Any full=18.4%. Full/Long=3.8%. NOTE: These priors from March 1 predate actual Hormuz closure; current closure already exceeds modal (None) expectation. Source: Bayesian_Military_Assessment.docx

END OF APPENDICES — END OF REPORT

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Sources: AP, Reuters, Al Jazeera, CNN, CNBC, BBC, NPR, Fox News, Fortune, The Hill, SOF News, Time, CBS, WaPo, GlobalSecurity.org, Wikipedia 2026 Iran War (live), CENTCOM, IEA, Wood Mackenzie, Rystad Energy, Alpine Macro, AAA, Polymarket, WSJ, Newsweek, Gulf News, Benzinga, All-In Podcast, Hengaw Human Rights, Bayesian_15Expert_Report.docx, Bayesian_Military_Assessment.docx