

# Iran’s Security Chief Killed, Israel Invades Lebanon, Trump’s Own Intelligence Director Quits: The War’s Worst Day of Escalation

*Day 18 delivered more escalation variables simultaneously than any previous day in this conflict. Iran’s top operational leader was killed. Israel opened a second front with a ground invasion of Lebanon. Trump’s own National Counterterrorism Center director resigned saying Iran posed no imminent threat and the war was a trap set by Israel. The Washington Post reported Trump was told before the war that the Iranian regime would not fall. The Trump-Xi summit was formally delayed by ‘a month or so.’ Gasoline hit \$3.79 and diesel crossed \$5 for the first time since 2022. Goldman Sachs raised the US recession probability to 25%.*

<b>18</b>	<b>\$3.79</b>	<b>\$5.04</b>	<b>25%</b>	<b>Delayed</b>
Days of war	US gas (AAA, Mar 17) +27% from Day 1	US diesel (AAA) First >\$5 since 2022	Goldman recession odds +5pp from pre-war	Trump-Xi summit ‘By a month or so’

## IRAN’S DE FACTO OPERATIONAL LEADER KILLED

In the early hours of March 17, Israeli airstrikes struck a site near Tehran and killed Ali Larijani, secretary of Iran’s Supreme National Security Council. Iran confirmed the death. Also killed: Basij commander Gholamreza Soleimani.

The IDF’s description of Larijani’s role is analytically significant. They did not call him ‘a senior official.’ They called him the ‘de facto leader of the Iranian regime’ who ‘consolidated his status... following the elimination of Khamenei’ and ‘led the combat efforts against the State of Israel and countries across the region.’

**CRITICAL**

If the IDF’s characterisation is accurate, Larijani was the functional operational commander of Iran’s war effort. His death removes both the primary civilian backchannel figure (Reuters confirmed Larijani had sought the Oman/Vance ceasefire conduit) and the man who had been de facto running military operations. The IRGC is now operating with reduced senior civilian oversight, which historically produces more, not less, aggressive military posture.

The simultaneous killing of Basij commander Gholamreza Soleimani is separately significant. The Basij is the regime’s internal security force, historically responsible for suppressing civilian protests. Removing its commander simultaneously with Larijani signals Israel is targeting the

regime's coercive domestic apparatus, not just its military capabilities.

## THE INTELLIGENCE BOMBHELL: TRUMP WAS WARNED THE REGIME WOULD SURVIVE

The Washington Post reported on March 17 that US intelligence assessments concluded the Iranian regime is likely to remain in place with the IRGC exerting greater control. More significantly: Trump had received 'very sobering briefings' before the war began and was explicitly told of the likelihood of a more entrenched IRGC if the operation proceeded.

*"It wasn't just predictable. It was predicted. He was told in advance."*

— Senior source familiar with Trump's pre-war intelligence briefings, Washington Post, March 17, 2026

The source also confirmed Trump was warned that attacking Iran could trigger retaliation against US Gulf allies. The administration's stated post-hoc surprise at Iran's attacks on Gulf neighbors is therefore not credible as a matter of intelligence. This does not change the military situation, but it changes the political accountability framing significantly. The Joe Kent resignation (see below) directly corroborates this picture: the top counterterrorism official in the US government went on record saying Iran posed no imminent threat and the war was based on a misinformation campaign. Kent had access to the same intelligence stream.

## JOE KENT RESIGNS: 'IRAN POSED NO IMMINENT THREAT'

Joe Kent, the Senate-confirmed Director of the National Counterterrorism Center — Trump's own principal counterterrorism adviser to the president, a 20-year Army combat veteran with 11 deployments — publicly resigned on March 17 in direct opposition to the war.

*"I cannot in good conscience support the ongoing war in Iran. Iran posed no imminent threat to our nation, and it is clear that we started this war due to pressure from Israel and its powerful American lobby."*

— Joe Kent, Director, National Counterterrorism Center, Resignation letter, March 17, 2026

Kent also accused Israel of running a 'misinformation campaign' that 'deceived' Trump into believing there was a clear path to victory. He invoked a personal dimension: his wife, Navy Senior Chief Shannon Kent, was killed in a suicide bombing in Syria in 2019. 'I cannot support sending the next generation off to fight and die in a war that serves no benefit to the American people,' he wrote.

The political significance: Kent is not a Democrat or an establishment Republican. He is a Trump appointee from the America First wing, confirmed 52-44 by a Republican Senate. His resignation gives Tucker Carlson (expected to interview him) and the MAGA anti-war faction their highest-credentialed validator yet. Axios reported the administration is 'bracing for' the Carlson interview.

### POLITICS

A 54% majority of voters now disapprove of Trump's handling of Iran, with 41% approving (Time/polling aggregate, March 17). The Kent resignation is the first resignation from Trump's own administration over this war and represents a new category of political risk: defection from the president's own base, not just opposition from Democrats.

## ISRAEL OPENS A SECOND FRONT: GROUND INVASION OF LEBANON

On March 17, Israel launched ground operations in southern Lebanon. Israeli Defense Minister Israel Katz said the operation would be similar to the Gaza war, and suggested Israel could occupy Lebanese territory indefinitely and ruled out the return of displaced Lebanese to their homes 'as long as Hezbollah remained a threat.'

Canada, France, Germany, Italy, and the UK issued a joint statement saying such an operation 'should be avoided.' Lebanon's death toll is now 912 (111 children). 1 million+ displaced.

IDF spokesperson Defrin: Hezbollah joined the conflict because it understood this was 'all out' war rather than a limited campaign — unlike its decision to stay out during last summer's 12-day war. Israel's military operations in Lebanon could continue beyond an end to the war in Iran.

NEW

The Lebanon ground invasion is the most direct path to the Catastrophe scenario. If Hezbollah escalates to full missile barrage (it has fired rockets; ground operations historically trigger escalation), Iran's remaining proxies activate, the Red Sea closes, and the two-strait disruption that Alpine Macro warned about — an additional 5M bpd lost — becomes reality.

## THE SUMMIT IS DELAYED, NATO HAS REFUSED, AND TRUMP REVERSED

On March 16, Trump confirmed the Xi summit would be delayed 'by a month or so.' Bessent stated the delay was for war coordination logistics, not a Hormuz dispute. White House press secretary Leavitt confirmed the dates would be updated. The summit that was the primary off-ramp mechanism in this analysis has now been moved to approximately late April or early May. NATO European nations, meeting as EU foreign ministers on March 17, formally declined to expand naval operations to include the Strait of Hormuz. Kaja Kallas (EU top diplomat): 'Europe has no interest in an open-ended war.' Italy: extending Aspides 'not possible.' France: mission must wait 'until circumstances permit.'

Trump's response went through three phases within 24 hours: (1) Warning NATO faces a 'very bad future' if they refuse. (2) Threatening to leave NATO ('something to think about'). (3) Then reversing completely: 'We never needed them anyway! WE DO NOT NEED THE HELP OF ANYONE!'

Strategically, the reversal undermines the coalition announcement the WSJ had reported as imminent. No named country has committed warships. The unilateral framing that follows ('we don't need anyone') is incompatible with building a multinational escort coalition.

## IRAN'S YUAN PASSAGE OFFER: A NEW STRATEGIC SIGNAL

CNN reported (March 17) that Iran is in discussions with eight countries outside the Middle East about granting safe passage to oil traded in Chinese yuan. Iran is also weighing a broader approach involving managed maritime traffic through Hormuz while maintaining its blockade against the US and allies.

This is analytically the most significant diplomatic signal since Pezeshkian's three-conditions offer on Day 12. It represents Iran offering a structured economic arrangement that: (a) breaks the dollar-denominated oil trade framework; (b) creates a permanent Chinese-dependent energy architecture; (c) and gives non-Western countries a direct economic incentive to oppose the US coalition.

The eight unnamed countries are almost certainly a mix of Asian importers (India, Pakistan,

South Korea, Japan candidates) and others. If this offer materialises, the US escort coalition loses its economic rationale for potential participants: why join a US-led military mission when you can just pay in yuan?

## WHERE THIS GOES: THE FOUR SCENARIOS, DAY 18 UPDATE

Day 18 delivers the sharpest single-day escalation of the conflict. Catastrophe rises again. The Quagmire probability compresses further as the war is now clearly expanding geographically. Off-Ramp falls again on Larijani death (removes key civilian backchannel) but is modestly offset by the yuan passage offer signal and summit delay (not cancellation).

<b>CATASTROPHE</b> Escalation	<b>48–</b> <b>53%</b>	Larijani killed (de facto operational commander). Lebanon ground invasion. NATO refused coalition. Dubai airport shut. IRGC weapons intact claim. WaPo: Trump told regime would survive, proceeded anyway. Lebanon invasion could trigger full Hezbollah barrage + Red Sea closure. (↑ from 44-48%)
<b>QUAGMIRE</b> Prolonged Attrition	<b>28–</b> <b>33%</b>	Compresses as geographic expansion makes ‘contained attrition’ less plausible. Lebanon ground op and IRGC intact weapons signal extend timeline. But IRGC weapons-intact claim is self-serving; actual degradation may be higher. (↓ from 34-38%)
<b>OFF-RAMP</b> Negotiated Exit	<b>10–</b> <b>14%</b>	Larijani death removes key civilian backchannel; summit delayed (not cancelled); yuan offer represents new diplomatic signal that could evolve into broader framework. Net: stable with slight downward bias. (↓ marginally from 11-14%)
<b>QUICK WIN</b> Regime Change	<b>2–3%</b>	WaPo bombshell: Trump’s own intelligence told him regime would survive. IRGC weapons intact. Basij volunteers responding to calls for ‘popular forces.’ (Stable)

## THREE THINGS TO WATCH

### 1 Tucker Carlson-Kent interview: timing and fallout

The Axios report that the White House is ‘bracing’ for this interview means it is coming. Kent is the highest-credentialed anti-war defector yet from Trump’s own ranks, and he specifically invoked Israeli deception of Trump — a framing Carlson has been building for weeks. Watch for the interview’s air date and immediate polling response among MAGA Republicans. A significant polling drop specifically within Trump’s base would be the most powerful single political signal yet.

## 2 Lebanon escalation: does it stay 'limited'?

Israel says the Lebanon ground operation is targeted. But Israeli officials have also said it could last beyond the end of the Iran war, it could lead to indefinite occupation, and that civilians cannot return. The IDF itself acknowledged Hezbollah joined because this is 'all out' war. Every expansion of the Lebanon front increases the probability of a full Hezbollah escalation, which activates the two-strait disruption scenario. Watch Hezbollah rocket volume (currently elevated but not maximum) and IDF force levels at the northern border.

## 3 The yuan Hormuz offer: do any of the 8 countries accept?

Iran in discussions with 8 countries on yuan-denominated passage. If any of those 8 countries publicly confirms a deal, it breaks the US coalition-building strategy open. The first country to accept creates an economic logic for others to follow, regardless of US pressure. Watch for shipping traffic data from MarineTraffic — specifically whether AIS-broadcasting non-Iranian tankers begin transiting without incident under a yuan arrangement.

**A NOTE ON METHODOLOGY** Scenario probabilities are produced by a Bayesian model weighting 15 expert analysts by track record across 113 scored historical predictions (2015–2025). The model does not weight analysts by prominence, ideology, or institutional affiliation — only by track record. All quotes are from public statements after March 1, 2026. Full technical report, sourcing, and prediction audit follow on the next page.

# OPERATION EPIC FURY

Comprehensive Strategic Intelligence Assessment

DAY 18 · MARCH 17, 2026

<b>18</b>	<b>\$3.79</b>	<b>\$5.04</b>	<b>13</b>	<b>2,200+</b>	<b>25%</b>
Days	US Gasoline	US Diesel	US KIA	Total regional KIA (CNN tally)	Goldman recession odds

Prepared by the Strategic Intelligence & Bayesian Assessment Consortium

## SECTION 1: EXECUTIVE SUMMARY

Day 18 is the most escalatory single day of the conflict. Six major developments alter the strategic picture: (1) Ali Larijani, described by the IDF as Iran's 'de facto leader,' killed. (2) Israel launches ground invasion of Lebanon — second front. (3) Washington Post confirms Trump was warned the Iranian regime would survive before he ordered the war. (4) Trump's National Counterterrorism Center director resigns publicly, calling Iran 'no imminent threat.' (5) Trump-Xi summit formally delayed 'by a month or so.' (6) US gasoline at \$3.79 (+27%), diesel crossing \$5 for first time since 2022. Goldman raises recession probability to 25%.

### 1.1 Day 17-18 Key Developments

- Ali Larijani killed, confirmed by Iran. IDF: 'de facto leader of the Iranian regime' who 'led the combat efforts.' Also killed: Basij commander Gholamreza Soleimani. This is the highest-value target eliminated since the war began.
- WaPo (March 17, three sources): Trump received 'very sobering briefings' before the war; was told regime likely to survive with more entrenched IRGC. Was told Iran would retaliate against Gulf allies. 'It wasn't just predictable. It was predicted. He was told in advance.'
- Joe Kent resignation (March 17): Director, National Counterterrorism Center (Trump appointee, Senate-confirmed July 2025). 'Iran posed no imminent threat to our nation, and it is clear that we started this war due to pressure from Israel.' Highest-profile administration resignation from Trump's own base. Tucker Carlson interview expected.
- Israel launches limited ground operations in southern Lebanon (March 17). Israel Katz: comparable to Gaza war; indefinite occupation possible; displaced citizens cannot return. Canada/France/Germany/Italy/UK joint statement: 'should be avoided.'
- NATO EU foreign ministers formally decline Hormuz coalition expansion. Trump cycled through: warning NATO of 'very bad future' → threatening to leave NATO → reversing: 'We never needed them! WE DO NOT NEED THE HELP OF ANYONE!'
- Iran offers yuan-denominated Hormuz passage to 8 unidentified non-Middle East countries (CNN source). Represents structured economic alternative to US coalition. If accepted, breaks US coalition-building strategy.
- US gas: \$3.79/gal (AAA Mar 17), +27% from Day 1. Largest monthly gas price spike since Hurricane Katrina. Diesel: \$5.04, first above \$5 since December 2022. Goldman Sachs: US recession probability raised 5pp to 25%.
- IRGC spokesperson: 'Most of our weapons cache remains intact. Missiles used are from a decade ago. Iran has not yet fired missiles produced since the 12-day war.' Significant claim if

accurate; consistent with declining ballistic rate being strategic rationing, not capability exhaustion.

- First non-Iranian cargo transited Hormuz with AIS broadcasting (Aframax Karachi, Abu Dhabi crude, March 16) — suggests selective access may be widening slightly.
- US State Dept issued worldwide alert to all diplomatic posts to review security postures; potential spill-over effects globally. 200 US troops injured in 7 countries (CENTCOM).
- Dubai International Airport temporarily shut from drone-related fire near fuel tanks; partially reopened. UAE death toll now 8.

## 1.2 Updated Scenario Probabilities

Scenario	D1	D10	D15	D16	D18	Primary Driver
<b>Quagmire / Prolonged Attrition</b>	52.3%	42-46%	29-33%	34-38%	<b>28-33%</b>	Geographic expansion (Lebanon ground) compresses quagmire probability mass toward Catastrophe
<b>Catastrophe / Escalation</b>	16.6%	35-38%	43-48%	44-48%	<b>48-53%</b>	Larijani killed (de facto commander). Lebanon invasion. NATO refused. IRGC weapons intact. Dubai airport shut. WaPo pre-war briefing.
<b>Stalemate / Off-Ramp</b>	21.9%	10-13%	16-20%	11-14%	<b>10-14%</b>	Larijani death removes civilian backchannel. Summit delayed (not cancelled). Yuan offer new signal. Net: stable with downward bias.
<b>Quick Win / Regime Change</b>	9.2%	3-5%	2-3%	2-3%	<b>2-3%</b>	WaPo: Trump's own intel predicted regime would survive. IRGC intact claim. Basij volunteers responding. Stable.

*Catastrophe is now above 50% in modal estimate for the first time. Combined worst-case (Catastrophe+Quagmire): ~83%. Catastrophe's trajectory: 16.6% (D1) → 35% (D10) → 44% (D15) → 48-53% (D18). Source: Bayesian\_15Expert\_Report.docx + Day 18 evidence.*

## SECTION 2: CHRONOLOGY — DAY 18 UPDATE

### 2.1 Days 1–18 Summary

Day	US / Israel Key Actions	Iran / Regional Counter-Strikes
<b>1-6</b>	900 strikes Day 1; Khamenei + 48 officials killed; Natanz/Fordow/Parchin hit; IRIB HQ struck; IRIS Dena frigate sunk; IDF first F-35 air-to-air kill; 80%+ air defenses claimed destroyed	True Promise IV: 90 ballistic + ~350 drones Day 1; embassies hit Kuwait/Bahrain; Bahrain desalination hit; THAAD radar destroyed Jordan (\$300M); hotel/airport strikes UAE

7-11	Oil depot strikes Tehran/Alborz; Taleghan nuclear testing site struck; Mojtaba confirmed SL (Day 9); IEA 412MB reserve release; Pezeshkian 3 ceasefire conditions	Ballistic rate stabilizes ~35/day; WTI hits \$119 intraday; mines confirmed Hormuz; IRGC permit regime formalized; 6,000+ mine inventory
12-14	KC-135 crash (6 KIA); Pentagon confirms girls school error (165 killed); Kharg Island struck (90+ military targets); 2,500 Marines + USS Tripoli ordered	US Embassy Baghdad helipad struck; Iran threatens UAE 3 ports; Fujairah fire; Mojtaba first statement (TV anchor, no video); David Sacks 'declare victory and get out'
15-16	Trump threatens Xi summit delay (FT interview); Trump asks world for warship coalition; Bessent-He Paris talks; IDF 400th wave; Trump 'terms not good enough yet'	Araghchi CBS: 'never asked for ceasefire'; Reuters: Trump rebuffed ceasefire approaches; IRGC source: 'losing Hormuz = losing war'; Isfahan struck; Dubai airport fire
17	NATO EU foreign ministers refuse Hormuz coalition; Trump cycles: warns NATO → threatens to leave → 'we never needed them!'; Trump-Xi summit officially delayed 'by a month or so'	IRGC claims weapons cache intact; missiles used are from 'a decade ago'; Iran has not fired post-12-day-war missiles yet; Dubai airport temporarily closed; UAE airspace shut overnight
18	Israel launches ground invasion of Lebanon (Katz: like Gaza; indefinite occupation possible); Ali Larjani killed in Israeli airstrike near Tehran; Joe Kent resignation: 'Iran posed no imminent threat'; WaPo: Trump was told regime would survive pre-war	Iran confirms Larjani death; Basij commander Soleimani also killed; Iran yuan-passage offer to 8 countries (CNN source); IRGC warns US-linked industrial facilities across region could come under imminent attack

*Total Iranian munitions: ~700+ ballistic + 3,600+ drones. 20+ vessels attacked in Persian Gulf/Hormuz/Gulf of Oman (UKMTO). 200 US troops injured in 7 countries (CENTCOM). Sources: CNN Day 18 live, Al Jazeera Day 18, ABC News live, Just Security Early Editions Mar 16-17, WaPo, Reuters, NYT, NBC, NPR, Euronews.*

## 2.2 Cumulative Casualty and Damage Summary — Day 18

Category	US / Coalition	Iran	Lebanon / Regional
<b>Military KIA</b>	13 US (7 hostile; 6 KC-135); 1 French; 2 Israeli soldiers	4,400+ (Hengaw Mar 14); likely higher by Day 18	Lebanon 912 (111 children); UAE 8; Kuwait 6; Iraq 47+
<b>Civilian KIA</b>	15 Israeli civilians (9 from one Beit Shemesh building)	1,351 (HRANA); 207+ children; 622 unconfirmed status	Lebanon 912 total (civilian+mil); 1 Pakistani in UAE (Day 18)
<b>US wounded</b>	200+ in 7 countries (CENTCOM, Mar 17)	18,551+ (HRANA)	1M+ Lebanon displaced
<b>Total regional KIA</b>	<b>2,200+ (CNN tally all parties)</b>		

# SECTION 3: THE LARIJANI ASSASSINATION — STRATEGIC ANALYSIS

## 3.1 Who Was Larjani?

Ali Larijani was one of the three or four most powerful figures in the Iranian state, and arguably the most powerful non-clerical official. He served as Speaker of Parliament (2008-2020), chief nuclear negotiator (2005-2007), and since 2022 had served as Secretary of the Supreme National Security Council (SNSC) — the body that coordinates all security, intelligence, military, and foreign policy.

Following Mojtaba Khamenei’s confirmed injury on Day 1 (fractured foot, bruised eye, lacerations), the IDF assessed Larijani had ‘consolidated his status as de facto leader of the Iranian regime.’ If this assessment is accurate, Israel has now killed the person who was actually running the war.

This is analytically the highest-impact single targeting event since Khamenei’s assassination on Day 1.

### 3.2 Strategic Implications

Dimension	Immediate Effect	Second-Order Effect
<b>Command structure</b>	Operational command of war effort disrupted. SNSC leadership gone. Mojtaba remains incapacitated.	IRGC takes fuller autonomous control. More hawkish, less willing to negotiate. Reduces civilian faction influence further.
<b>Ceasefire channel</b>	Larijani was the key figure in the Oman/Vance backchannel attempt (Reuters). That channel is now structurally destroyed.	Off-Ramp scenario loses its most credible Iranian interlocutor on the civilian/pragmatist side.
<b>Escalatory response</b>	IRGC will almost certainly escalate in retaliation. Historical pattern: killing of major Iranian figures triggers intensified operations.	Watch for: stepped-up attacks on UAE/Saudi civilian infrastructure; possible Hezbollah full escalation to cover for IRGC response.
<b>Leadership vacuum</b>	Iran now has: Mojtaba (incapacitated, health unclear), Pezeshkian (civilian president, limited military authority), and the IRGC high command (Soleimani-cousin: killed).	IRGC is now the primary decision-making authority with minimal civilian oversight. Historical IRGC autonomous operations are more aggressive than politically-moderated Iranian foreign policy.

*Basij commander killed was Gholamreza Soleimani — no relation to Qasem Soleimani. The Basij is Iran’s 50,000-strong internal security militia. Its commander’s killing signals Israel is systematically targeting the regime’s coercive apparatus, not just military capability.*

## SECTION 4: THE INTELLIGENCE BOMBSHELL — PRE-WAR BRIEFINGS

The Washington Post (March 17, three sources including senior US officials and intelligence community members) reported:

*“US intelligence assessments say that the Iranian regime is likely to remain in place for now, with the Islamic Revolutionary Guard Corps exerting greater control. Trump has been receiving ‘very sobering briefings’ on the US intelligence, said one of the two sources, adding that Trump was told of the likelihood of a more entrenched IRGC before he gave the go-ahead to jointly launch the war with Israel.”*

*“It wasn’t just predictable. It was predicted. He was told in advance.”*

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The same sources confirmed Trump was warned that attacking Iran could trigger retaliation against US Gulf allies — directly contradicting the White House’s stated surprise at Iranian strikes on Gulf neighbors.

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This report has two simultaneous analytical effects. First, it retrospectively confirms what our model has assessed throughout: the Quick Win/Regime Change scenario was never well-supported by intelligence. Second, it creates a new accountability question: if Trump was told the regime would survive, what was the intended endgame? The answer that emerges from public statements — that the objectives shifted from regime change to nuclear disarmament to Hormuz reopening to ‘unconditional surrender’ — is consistent with a campaign launched without a defined terminal condition.

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#### 4.1 Joe Kent Resignation — Full Text (Key Excerpts)

*“Iran posed no imminent threat to our nation, and it is clear that we started this war due to pressure from Israel and its powerful American lobby.”*

*“This echo chamber was used to deceive you into believing that Iran posed an imminent threat to the United States, and that should you strike now, there was a clear path to victory. This was a lie and is the same tactic the Israelis used to draw us into the disastrous Iraq war that cost our nation the lives of thousands of our best men and women.”*

*“I cannot support sending the next generation off to fight and die in a war that serves no benefit to the American people nor justifies the cost of American lives.”*

Attribution: Joe Kent, Director, National Counterterrorism Center, Resignation letter posted to social media, March 17, 2026. Kent served as principal counterterrorism adviser to the president. Senate-confirmed 52-44, July 2025.

#### 4.2 Administration Responses

Official	Statement	Analytical Weight
Speaker Johnson	‘I got all the briefings. There was clearly an imminent threat... I don’t know where Joe Kent is getting his information.’	Johnson is in the Gang of Eight. His claim he received different briefings than Kent is consistent with Kent being sidelined from Presidential Daily Brief Iran discussions.
Trump	‘A nice guy. I always thought he was weak on security.’	Does not address the substance of Kent’s claim on imminence. Signals White House has no factual rebuttal.
Leavitt (WH PS)	‘Many false claims... strong and compelling evidence that Iran was going to attack the United States first.’ Did not detail the evidence.	Non-specific rebuttal. The administration has not declassified the intelligence underlying its imminent threat claim, preventing public verification.
DNI Gabbard	‘As our Commander in Chief, he is responsible for determining what is and is not an imminent threat.’ Did not address Kent by name.	Deferred entirely to presidential authority rather than defending the intelligence assessment. This implicitly concedes the intelligence question.

## SECTION 5: ECONOMIC UPDATE — DAY 18

### 5.1 Gasoline and Diesel — The Clock Has Crossed

Indicator	Feb 28 (Day 1)	Mar 17 (Day 18)	Context
US regular gasoline (AAA)	\$2.927	<b>\$3.79 (+27%)</b>	Highest since October 2023. Largest monthly spike since Hurricane Katrina (2005). \$4.00 red line now 2-3 days away.
US diesel (AAA)	\$3.70	<b>\$5.04 (+36%)</b>	First above \$5 since December 2022. Essential for trucking, agriculture, logistics. Economic transmission accelerating.
Brent crude	~\$73	~\$103 (+41%)	+40% since war began. Spiked to ~\$120 early (Day 8). WTI ~\$97. Goldman: if crude averages \$110 in Mar-Apr: inflation 3.3%, GDP 2.1%.
Goldman Sachs recession probability	20%	<b>25% (+5pp)</b>	Raised specifically because of Hormuz disruption sustained impact. Oxford Economics: \$140/bbl for 2 months = US economic standstill.
IEA SPR release efficacy	N/A	412MB pledged	Asian countries releasing immediately; Europe end of March. Covers ~15% of supply gap. IEA Birol: 'not a lasting solution.'

*GasBuddy (Patrick De Haan, March 16): 'Until we see a meaningful resumption of oil flows through the Strait of Hormuz, upward pressure on fuel prices is likely to persist. Seasonal forces [summer gasoline transition] create a double headwind that could continue driving pump prices higher.'*

### 5.2 Beyond Oil: Broader Supply Shock

- Fertilizer (urea): +35% since Feb 28. One-third of global urea transits Hormuz. Northern Hemisphere planting season starting. Food inflation is not a future risk; it is an imminent one.
- Aluminum: prices surged to four-year high. ~20% of world's raw aluminum from Middle East. Affects construction, vehicles, packaging.
- Helium: 25%+ of global supply from Qatar through Hormuz. Semiconductor manufacturing impact. Already in pre-war shortage for AI chip demand.
- Pharmaceutical supply chains: India (world's generic drug hub) depends on Hormuz air corridors. Certain drugs require rapid shipping; disruption = higher drug costs in Europe within weeks.
- Natural gas: European/Asian prices doubled since war began. US LNG demand increase keeping US prices somewhat elevated.

## SECTION 6: PREDICTION MARKET ANALYSIS — DAY 18

Market	Poly	Bayes	CI	Edge	Conviction / Change
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<b>Mojtaba as leader Dec 31</b>	~57%	70-75%	[59,83]	<b>LONG +13-18</b>	VERY HIGH. Larijani dead removes civilian counterweight; IRGC supports Mojtaba. IDF's 'de facto leader = Larijani' claim may update Poly downward on Mojtaba — watch for market reaction. But constitutionally Mojtaba is SL.
<b>Ceasefire by March 31</b>	~18%	4-8%	[2,14]	<b>SHORT +10-14</b>	VERY HIGH. Larijani ceasefire channel destroyed. Summit delayed to ~May 1. Lebanon ground war opened. 14 days remain. Poly converging from 32% (D13) to 18% (D18). Still 10-14pts short.
<b>Regime fall before 2027</b>	~26%	10-14%	[7,20]	<b>SHORT +12-16</b>	VERY HIGH. WaPo: Trump's own intel predicted regime survival. IRGC intact weapons claim. Basij volunteers responding. IDF: still thousands of targets. No collapse signal.
<b>Oil above \$120 before April</b>	~52%	55-68%	[44,78]	<b>LONG +3-16</b>	MODERATE-HIGH. Larijani killing likely to produce IRGC escalatory response. Lebanon ground invasion adds pressure. Brent already at \$103; \$120 is ~17% higher. Poly approaching Bayes.
<b>Ceasefire by June 30</b>	~48%	28-38%	[19,50]	<b>SHORT +10-20</b>	MODERATE. IDF planning through early May; Larijani death destroys near-term channel; summit delay to May 1 is new off-ramp window but 6 weeks away. Poly falling slower than near-term markets.

## SECTION 7: KEY UNCERTAINTIES — RANKED BY IMPACT

#	Uncertainty	Modal Assumption	Scenario Impact	Resolution Indicator
1	<b>Hezbollah full escalation following Lebanon ground invasion</b>	Controlled escalation; IDF aims to keep Lebanon front limited	Catastrophe +10-15pp if Hezbollah launches full missile barrage AND Houthis activate Red Sea	Hezbollah rocket volume; IDF force levels at northern border; Iran-Hezbollah communications
2	<b>IRGC retaliation for Larijani assassination</b>	Stepped-up attacks within 24-72hrs; likely UAE/Saudi civilian infrastructure targets	Catastrophe +8pp if UAE civilian infrastructure hit decisively; Off-Ramp -4pp	IRGC attack rate hours after Larijani confirmation; targets hit; Khatam al-Anbiya statements

3	<b>Tucker Carlson-Kent interview: MAGA base polling response</b>	Interview comes within days; causes significant MAGA Republican polling movement	Off-Ramp +5-8pp if Republican approval of Trump's Iran handling drops measurably; Catastrophe -4pp	Post-interview polling; Senate Republican floor statements; Massie-Khanna war powers
4	<b>Yuan Hormuz passage offer: do any 8 countries accept?</b>	1-2 Asian countries may quietly accept; China coordinates	Off-Ramp +4-6pp if framework accepted (implies Iran political will for selective reopening exists); US coalition-building destroyed	MarineTraffic AIS data; Bloomberg shipping intelligence; Chinese/Indian tanker transit rates
5	<b>Gasoline crosses \$4.00 — 2-3 days away</b>	Will be crossed within this week at current rate	Off-Ramp +6-8pp when first Republican Senator calls for war powers review publicly	AAA daily; Senate floor statements; Massie-Khanna cosponsors list
6	<b>Delayed Xi summit (now ~May 1): does it produce Iran framework?</b>	Summit goes ahead ~May 1; Bessent-He Paris framework development continues	Off-Ramp +6-10pp if confirmed summit date with Iran framework element	Xinhua summit confirmation; Bessent-He readout language; State Dept China desk
7	<b>IRGC weapons-intact claim: is it accurate?</b>	Partially accurate; ~35 ballistic/day represents rationing + some capability degradation	Catastrophe +8pp if accurate (Iran can sustain for months); Quagmire +5pp	Ballistic rate trend; satellite imagery of launch sites; IDF launcher destruction claims vs. verified

## SECTION 8: STRATEGIC CONCLUSIONS — DAY 18

**Catastrophe is now the modal scenario above 50% for the first time.**

Day 18 brought the sharpest single-day upward shift in Catastrophe probability of the conflict. The compounding factors are each individually serious; together they represent a qualitative threshold crossing: the war is now demonstrably expanding geographically (Lebanon), losing its civilian diplomatic nodes (Larijani), fragmenting Trump's political coalition (Kent, MAGA anti-war faction), and approaching the economic red lines (\$4.00 gasoline, \$5 diesel, 25% Goldman recession odds).

**The IRGC weapons-intact claim is the most underpriced risk in current analysis.**

If the IRGC's claim that it has not yet used its post-12-day-war missile inventory is accurate, the conflict has been fought so far with Iran's older, degraded stocks. A deliberate escalation using its most capable systems — potentially hypersonic, longer-range, or more accurate — has not yet occurred. This claim has not been independently verified and may be propaganda. But it is consistent with the observed declining-then-stable ballistic rate, which could reflect rationing rather than depletion.

**The off-ramp has shifted from Trump-Xi summit (March 31) to Trump-Xi summit (May 1) — an approximately 30-day extension.**

The yuan passage offer, if it evolves into a structured framework, could provide China with a face-saving mechanism: Chinese pressure produces a managed Hormuz reopening for yuan-trading nations, Chinese leverage over Iran increases, and the summit becomes an announcement venue rather than a negotiating session. This is the most plausible off-ramp architecture currently visible. It requires Chinese strategic interest outweighing tactical benefit of watching the US bleed.

**THE BOTTOM LINE** The war has crossed a threshold. Catastrophe is now the most likely single outcome at 48-53%. Four concurrent developments drove this: Larijani’s death (removes civilian command and ceasefire channel simultaneously), Lebanon ground invasion (second front, Hezbollah escalation risk), NATO refusal of Hormuz coalition (US isolated), and the Kent-WaPo intelligence revelation (political accountability crisis building). The yuan passage offer is the first genuinely novel diplomatic signal in days and must be watched carefully. The \$4.00 gasoline threshold will be crossed within 2-3 days. When Republican senators start calling for war powers review, the off-ramp probability moves. Until then, the war is expanding faster than the diplomacy is developing.

## END OF REPORT — APPENDICES FOLLOW

Strategic Intelligence & Bayesian Assessment Consortium · Day 18 · March 17, 2026

Sources: CNN Day 18 live, Al Jazeera Day 18, ABC News live (Kent resignation), WaPo (Kent/pre-war intel, March 17), Axios (Kent/Biden/China), Just Security Early Editions Mar 16-17, NPR, NBCNews, Reuters, CNBC (Goldman recession, diesel \$5), Wikipedia 2026 Iran War (live), CENTCOM, IDF, HRANA, Hengaw, Lebanese Health Ministry, AAA, MarineTraffic, Time, OPB, ABC7, CBS News, Euronews, Drop Site News

# APPENDIX A

## 15-EXPERT PANEL — COMPLETE PREDICTION AUDIT (113 PREDICTIONS)

Scoring: TRUE=1.0, MOSTLY TRUE=0.75, PARTIAL=0.50, MOSTLY FALSE=0.25, FALSE=0.00. Bayesian Beta-posterior.  $E[p]=\alpha/(\alpha+\beta)$ . Jeffreys prior Beta(0.5,0.5). Source: Bayesian\_15Expert\_Report.docx (March 1, 2026).

### A.1 Expert Accuracy Summary

Expert	Affiliation	N	Sum	Alpha	Beta	E[p]	Camp	Key Domain
Mearsheimer	U. Chicago	8	7.25	7.75	1.25	<b>0.861</b>	Dovish	Grand strategy
Vaez	Crisis Group	6	5.25	5.75	1.25	<b>0.821</b>	Dovish	Iran domestic
Kinzer	Boston Univ	7	5.75	6.25	1.75	<b>0.781</b>	Dovish	Intervention hist.
Bajoghli	Johns Hopkins	5	4.00	4.50	1.50	<b>0.750</b>	Dovish	IRGC sociology
Ben Taleblu	FDD	7	5.25	5.75	2.25	<b>0.719</b>	Hawkish	Missiles/drones

Sachs	Columbia	8	5.50	6.00	3.00	<b>0.667</b>	Dovish	Conflict costs
Takeyh	CFR	8	5.50	6.00	3.00	<b>0.667</b>	Hawkish	Iranian military
Schanzer	FDD	7	4.75	5.25	2.75	<b>0.656</b>	Hawkish	Axis of resistance
Dubowitz	FDD CEO	8	5.25	5.75	3.25	<b>0.639</b>	Hawkish	Sanctions/strategy
Crooke	Conflicts Forum	8	5.00	5.50	3.50	<b>0.611</b>	Dovish	Resistance axis
Friedman	Geopolit. Futures	9	5.25	5.75	4.25	<b>0.575</b>	Other	Grand strategy
Rubin	AEI / MEF	8	4.00	4.50	4.50	<b>0.500</b>	Hawkish	Rogue regimes
Ritter	Ex-UNSCOM	9	3.25	3.75	6.25	<b>0.375</b>	Dovish	Military ops
Gerecht	FDD / Ex-CIA	8	2.50	3.00	6.00	<b>0.333</b>	Hawkish	Regime change
Molyneux	Independent	7	0.50	1.00	7.00	<b>0.125</b>	Other	Western decline

*Dovish avg: 0.695 | Hawkish avg: 0.586 | Other: 0.350. 100K Monte Carlo. FDD corr. 0.45-0.60; realist 0.40-0.50. Effective independent experts: 10.13/15. Extremising d=0.675.*

## A.2 Complete 113-Prediction Track Record

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

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

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

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

BEN TALEBLU — E[p]=0.719			
Prediction	Year	Score	Verdict
JCPOA sunset would enable Iran nuclear expansion after 2025	2015-18	0.75	MOSTLY TRUE
Iran would transfer drones/missiles to Russia after arms embargo lifted	2020	1.00	TRUE
Iran ballistic missiles represent growing threat requiring Western attention	2018	0.75	MOSTLY TRUE
Iran cruise missile capability underestimated by the West	2019	0.75	MOSTLY TRUE
Houthi missile capabilities pose genuine regional threat	2018	1.00	TRUE
Maximum pressure would alter regime's cost-benefit calculation	2019	0.25	MOSTLY FALSE
IRGC-Quds Force network requires kinetic + financial targeting	2020	0.75	MOSTLY TRUE

SACHS — E[p]=0.667			
Prediction	Year	Score	Verdict
Iraq sanctions cause humanitarian catastrophe without regime change	1990s	1.00	TRUE
Shock therapy would succeed in Poland	1990	0.75	MOSTLY TRUE
Shock therapy would succeed in Russia similarly to Poland	1992	0.25	MOSTLY FALSE
Iraq War would destabilize Middle East broadly	2003	1.00	TRUE
US sanctions on Iran hurt civilians without changing regime behavior	2018	1.00	TRUE
Multipolar world order emerging, reducing US unilateral power	2020	0.75	MOSTLY TRUE
Ukraine conflict could escalate toward nuclear confrontation	2022	0.25	MOSTLY FALSE
COVID origins debate suppressed then vindicated (lab leak)	2021	0.50	PARTIAL

TAKEYH — E[p]=0.667			
Prediction	Year	Score	Verdict
JCPOA sunset provisions leave Iran well-positioned for nuclear breakout	2015	0.75	MOSTLY TRUE
Iran defense budget would double post-JCPOA; regional aggression increase	2017	0.75	MOSTLY TRUE
Snapback sanctions would never actually be implemented	2015	0.25	MOSTLY FALSE

Iran a revolutionary state; normal negotiations won't produce results	2015	0.75	MOSTLY TRUE
Sanctions not crippling Iran; resistance economy survives	2022	0.75	MOSTLY TRUE
Regime is multi-layered; bombing alone won't topple it	2026	0.75	MOSTLY TRUE
Air power can destroy nuclear/missile programs but Iran rebuilds	2026	0.75	MOSTLY TRUE
Killing Khamenei creates confusion but doesn't ensure regime change	2025-26	0.75	MOSTLY TRUE

SCHANZER — E[p]=0.656			
Prediction	Year	Score	Verdict
Hamas-Fatah split is fundamental obstacle to Palestinian statehood	2008	0.75	MOSTLY TRUE
Iran's 'ring of fire' strategy to strangle Israel is a strategic reality	2023	0.75	MOSTLY TRUE
JCPOA sanctions relief yields financial boon for Hamas and proxies	2021	0.75	MOSTLY TRUE
Turkey's HTS support makes it an unreliable NATO ally	2024	0.75	MOSTLY TRUE
Iran's axis of resistance weakened but not eliminated after Israeli strikes	2024	0.75	MOSTLY TRUE
Houthi Red Sea threat requires decisive military response	2024	0.50	PARTIAL
Assad regime is enduring (pre-December 2024 fall)	2013-23	0.50	PARTIAL

**DUBOWITZ — E[p]=0.639**

Prediction	Year	Score	Verdict
JCPOA fatally flawed; sunset provisions create patient path to the bomb	2015	0.75	MOSTLY TRUE
Maximum pressure would bring Iran to the negotiating table	2018	0.25	MOSTLY FALSE
Iran sanctions can choke regime revenue if properly enforced	2018	0.50	PARTIAL
Soleimani killing wouldn't trigger 'World War Three'	2020	1.00	TRUE
JCPOA sanctions relief funds Iran proxies	2015	0.75	MOSTLY TRUE
Iran's rial collapse signals regime economic vulnerability	2018-25	0.75	MOSTLY TRUE
Max pressure + max support empowers Iranians to dismantle regime	2020	0.25	MOSTLY FALSE
Biden admin lax enforcement enabled Iran oil revenue surge	2021-24	1.00	TRUE

CROOKE — E[p]=0.611			
Prediction	Year	Score	Verdict
Hamas election victory dynamics / Western miscalculation	2006	1.00	TRUE
Hezbollah survives 2006 Lebanon War and emerges stronger	2006	1.00	TRUE
Western intervention in Syria empowers jihadist groups	2012	1.00	TRUE
Assad regime would survive (with Russian/Iranian support)	2013-23	0.50	PARTIAL
Resistance axis is durable and strategically coherent	2020	0.25	MOSTLY FALSE
Hezbollah's existence not in question after Nasrallah killed	2024	0.25	MOSTLY FALSE

Syria in much better place by end of 2017	2017	0.25	MOSTLY FALSE
US Syria strikes emotionally driven with lasting negative consequences	2017	0.75	MOSTLY TRUE

FRIEDMAN — E[p]=0.575			
Prediction	Year	Score	Verdict
US-jihadist conflict would define post-9/11 era	2001	0.75	MOSTLY TRUE
Russia would reassert regional power in former Soviet space	2009	1.00	TRUE
EU structural crisis and fragmentation pressures would intensify	2011	0.75	MOSTLY TRUE
Japan-China tensions would intensify over territorial disputes	2011	0.50	PARTIAL
Turkey would emerge as major regional power	2009	0.50	PARTIAL
Poland would become key European power by 2030s	2009	0.25	MOSTLY FALSE
US remains dominant through 2020s despite decline narratives	2011	0.75	MOSTLY TRUE
Major US-Mexico tensions over immigration/border	2009	0.75	MOSTLY TRUE
Major US-Japan military tensions by 2050	2009	0.00	FALSE

RUBIN — E[p]=0.500			
Prediction	Year	Score	Verdict
Iraq regime change would benefit regional stability	2002-03	0.00	FALSE

Engaging rogue regimes like Iran is dangerous and counterproductive	2014	0.50	PARTIAL
Chalabi as reliable US partner in post-Saddam Iraq	2003	0.00	FALSE
Military strikes alone insufficient; regime itself is the problem	2012	0.75	MOSTLY TRUE
Turkey under Erdogan increasingly hostile to US interests	2015	1.00	TRUE
Iranian regime won't moderate through diplomacy	2007	0.75	MOSTLY TRUE
Kurdish forces key US allies deserving of state support	2014-19	0.75	MOSTLY TRUE
Obama admin more antagonistic to Israel than to rogue states	2014	0.25	MOSTLY FALSE

RITTER — E[p]=0.375			
Prediction	Year	Score	Verdict
Iraq had no significant WMD stockpiles (pre-2003 invasion)	2002	1.00	TRUE
Iraq War would not be quick or easy victory	2003	0.50	PARTIAL
US couldn't take Baghdad / would leave with tail between legs	2003	0.25	MOSTLY FALSE
Imminent US attack on Iran forecast for June 2005	2005	0.00	FALSE
Syria al-Kibar not a nuclear facility	2007	0.00	FALSE
Decisive Russian military victory in Ukraine in 2023	2023	0.25	MOSTLY FALSE
Ukraine suffering unsustainable losses and cannot win	2022	0.50	PARTIAL
Denied Russian responsibility for Bucha massacre	2022	0.00	FALSE

Russian economy would survive Western sanctions	2022	0.75	MOSTLY TRUE
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GERECHT — E[p]=0.333			
Prediction	Year	Score	Verdict
Iraq War won't destabilize the Middle East	2002	0.00	FALSE
US invasion of Iraq would provoke democratic revolution in Iran	2002	0.00	FALSE
Iran is in no shape for prolonged confrontation with US	2019	0.25	MOSTLY FALSE
Iranian middle class/youth have given up on regime; will welcome change	2019	0.50	PARTIAL
Negotiations with Iran are illusion; time for diplomacy shrinking fast	2007	0.25	MOSTLY FALSE
Afghanistan intervention against Taliban was justified and necessary	2001	0.75	MOSTLY TRUE
Petraeus surge was succeeding in Iraq	2007	0.50	PARTIAL
Pro-Iranian proxies in Iraq can be eradicated completely	2026	0.25	MOSTLY FALSE

MOLYNEUX — E[p]=0.125			
Prediction	Year	Score	Verdict
Western civilization collapse imminent due to immigration	2015-19	0.00	FALSE
Trump would transform US foreign policy away from interventionism	2016	0.25	MOSTLY FALSE
Brexit would trigger EU collapse within years	2016	0.00	FALSE

Mass social breakdown in Sweden/Germany from migration	2017	0.25	MOSTLY FALSE
Canadian economy collapse under Trudeau	2017	0.00	FALSE
Iran deal withdrawal leads to quick Iranian capitulation	2018	0.00	FALSE
Red wave in US midterms 2022	2022	0.00	FALSE

113 total scored predictions. Source: *Bayesian\_15Expert\_Report.docx* (March 1, 2026).

## APPENDIX B

### 23-EXPERT MILITARY PANEL — RAW DATA

Source: *Bayesian\_Military\_Assessment.docx* (March 1, 2026). Attrition balance + Hormuz closure Dirichlet vectors.

#### B.1 Expert Profiles

Expert	Affiliation	Camp	Focus	N	Acc.	Beta Posterior	Kappa
<b>Ben Taleblu</b>	FDD Iran Program	Hawk	Missiles/drones	5	0.72	B(4.1,1.9)	14
<b>Eyal Pinko</b>	Bar Ilan/Ex-Navy	Hawk	Interceptor attrition	3	0.70	B(2.6,1.4)	14
<b>Sidharth Kaushal</b>	RUSI Senior Fellow	Indep.	Naval/missile defense	6	0.75	B(5.0,2.0)	14
<b>Jack Watling</b>	RUSI Senior Fellow	Indep.	Russian arms to Iran	4	0.73	B(3.4,1.6)	14
<b>Wes Rumbaugh</b>	CSIS Missile Defense	Indep.	Interceptor stockpiles	5	0.72	B(4.1,1.9)	14
<b>Ehud Eilam</b>	Israeli Def. Analyst	Hawk	IDF attrition	4	0.68	B(3.2,1.8)	13
<b>Mearsheimer</b>	U. Chicago	Dove	Grand strategy	8	0.86	B(7.4,1.6)	15
<b>Vaez</b>	Crisis Group	Dove	Iran diplomacy	6	0.82	B(5.4,1.6)	15
<b>Takeyh</b>	CFR Senior Fellow	Hawk	Iranian military	8	0.67	B(5.8,3.2)	13
<b>Schanzer</b>	FDD Exec Director	Hawk	Axis of resistance	7	0.66	B(5.1,2.9)	13

<b>Dubowitz</b>	FDD CEO	Hawk	Sanctions/ strategy	8	0.64	B(5.6,3.4)	13
<b>Gerecht</b>	FDD / Ex-CIA	Hawk	Regime vulnerabilities	8	0.33	B(3.2,5.8)	11
<b>Ritter</b>	Ex-UNSCOM	Dove	Military ops	9	0.38	B(3.9,6.1)	11
<b>Crooke</b>	Conflicts Forum/MI6	Dove	Resistance axis	8	0.61	B(5.4,3.6)	13
<b>Eugene Gholz</b>	UT Austin/ Strauss	Indep.	Hormuz campaign	5	0.74	B(4.2,1.8)	14
<b>Jennifer Kavanagh</b>	Defense Priorities	Dove	US defense trade-offs	4	0.71	B(3.3,1.7)	14
<b>Bob McNally</b>	Rapidan Energy	Indep.	Oil/Hormuz economics	3	0.69	B(2.6,1.4)	14
<b>Samuel Bendett</b>	CNAS Fellow	Indep.	Drones/ autonomous	4	0.71	B(3.3,1.7)	14
<b>Tal Inbar</b>	Missile Def. Advocacy	Hawk	Interceptor economics	5	0.70	B(4.0,2.0)	14
<b>Alex Plitsas</b>	Atlantic Council	Indep.	Iran retaliation	3	0.68	B(2.5,1.5)	13
<b>Dmitriy Shapiro</b>	FDD Analyst	Hawk	Russia-Iran arms	4	0.66	B(3.1,1.9)	13
<b>George Friedman</b>	Geopolitical Futures	Other	Grand strategy	9	0.57	B(5.7,4.3)	13
<b>Jeffrey Sachs</b>	Columbia/UN	Dove	Conflict costs	8	0.67	B(5.8,3.2)	13

## B.2 Attrition Balance

Expert	Camp	P(Iran 1st)	P(US/IL 1st)	Reasoning
Ben Taleblu	Hawk	0.72	0.28	US resupply advantage decisive; Iran production sites exposed
Pinko	Hawk	0.55	0.45	Close race; thousands of missiles vs finite interceptors
Kaushal	Indep.	0.42	0.58	THAAD depletion; US industrial base bottleneck
Watling	Indep.	0.45	0.55	Russian tech transfers improve Iranian survivability
Rumbaugh	Indep.	0.48	0.52	THAAD takes 4-8yrs to replace; real production bottleneck
Eilam	Hawk	0.50	0.50	Offensive TEL destruction balances interceptor stress
Mearsheimer	Dove	0.35	0.65	Attrition favors defender in asymmetric conflicts
Vaez	Dove	0.40	0.60	Iran reconstituted to ~2,000 MRBMs; interceptor gap
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

Dubowitz	Hawk	0.70	0.30	Iran doctrine is to deter, not deliver at scale
Gerecht	Hawk	0.78	0.22	Iran not in shape for prolonged confrontation
Ritter	Dove	0.25	0.75	Indefinite interceptor expenditure unsustainable
Crooke	Dove	0.30	0.70	Mine-laying continues even under suppression
Gholz	Indep.	0.52	0.48	Iran self-deterrence limits offensive; close race
Kavanagh	Dove	0.38	0.62	Indo-Pacific trade-offs make sustained defense untenable
McNally	Indep.	0.55	0.45	Oil spike forces Iran's hand before US inventory depletes
Bendett	Indep.	0.50	0.50	Drone economics: \$35K attacker vs \$15M interceptor
Inbar	Hawk	0.58	0.42	Defense costlier but prevented damage has irreplaceable value
Plitsas	Indep.	0.47	0.53	Underground cities prolong Iranian 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
Sachs	Dove	0.33	0.67	US cannot afford sustained ops; Iran resilient
<b>CONSENSUS</b>	All	<b>49.8%</b>	<b>50.2%</b>	Coin flip. 95% HDI: [38.4%, 61.8%]. Effective independent experts: 14.7/23.

**NOTE:** IRGC claim on Day 17-18 that 'most weapons cache intact' and 'missiles used are from a decade ago' is directly relevant to this attrition model. If accurate, it shifts the consensus toward P(US/IL 1st) and lengthens conflict timeline substantially. Claim is unverified; treat as Iran strategic signaling pending independent confirmation.

## END OF APPENDICES — END OF REPORT

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Expert data: Bayesian\_15Expert\_Report.docx + Bayesian\_Military\_Assessment.docx (March 1, 2026).