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Perspectives On the Issues Shaping Policy

Iran-US War: Strategic Dynamics, Constraints, and the Elusive Endgame

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Introduction and Background

The Iran–America war commenced on 28 February 2026, marking the beginning of one of the most consequential geopolitical and military confrontations in the contemporary Middle East. Although the outbreak of hostilities appeared sudden, the conflict was rooted in years of strategic rivalry, competing regional interests, ideological divides, economic sanctions, and recurring military and diplomatic tensions.

American War Goals and Strategic Aims

The aims of each side defined the war's trajectory. For the United States, the foremost goal was to prevent Iran from becoming a nuclear weapons state, driven by concerns over enriched uranium stockpiles and advanced facilities such as Fordow and Natanz. A second aim was to dismantle Iran's network of regional allies, including Hezbollah, the Houthis, and Hamas, which the United States and Israel viewed as destabilizing. Another assumption was that external military pressure and harsh sanctions would spark internal unrest, possibly leading to a public uprising against the clerical regime. Israeli intelligence reportedly believed that the Iranian regime had become vulnerable after decades of isolation and public discontent. On the military front, American and Israeli planners

expected their technology and firepower to neutralize missile sites, drone factories, and elements of the Iranian military and political leadership, potentially creating a leadership vacuum. These expectations, however, did not materialize as anticipated. The regime held together, the expected uprising did not emerge, and the conflict continued for much longer than initially envisaged.

The Islamabad MoU and Fragile Peace

As the fighting paused, a 14-point Memorandum of Understanding (MOU), facilitated through Islamabad, was framed as a 60-day framework under intense diplomacy. One of its important provisions concerned the cessation of hostilities on all fronts, while another dealt with the control and free flow of cargo, tankers, and shipping through the Strait of Hormuz. However, differing interpretations of the MOU quickly emerged. Iran viewed the agreement as potentially providing significant economic relief, including the release of frozen assets, removal or reduction of sanctions, and assistance for reconstruction. At the same time, the United States remained focused on security guarantees and the reopening of maritime routes. Tensions subsequently resurfaced following attacks on tankers and cargo vessels, turning the Strait of Hormuz into the principal flashpoint of the renewed conflict.

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The 60-day period intended to develop the technical modalities of the agreement therefore became increasingly fragile. The MOU has now passed its stipulated 60-day period, although reports suggest that it continues to provide a framework for back-channel communications regarding negotiations.

The Strait of Hormuz: A Strategic Flashpoint

The differing interpretations of the MOU's maritime provisions transformed the Strait of Hormuz into a central theatre of the conflict. Iran sought greater control over navigation, maritime security, and the removal of sea mines through a phased process, while the United States and its allies insisted on the free movement of international shipping. Attacks on vessels associated with Gulf countries further aggravated the situation. From this point onward, the conflict entered a cycle of intermittent attacks, counter-attacks, threats, and temporary lulls, with both sides claiming strategic advantage. The Strait of Hormuz consequently became not merely a maritime passage but a major strategic pivot of the war.

The Economic Front and the Cost of War

Alongside kinetic operations, the United States increasingly relied upon economic pressure. Sanctions, secondary sanctions, restrictions on banking channels, and the continued denial of access to frozen assets became instruments of warfare. Iran was already facing severe economic difficulties, including high inflation, pressure on its currency, restrictions on oil exports, and infrastructure damage. Disruptions to trade and maritime transportation further intensified these pressures. At the same time, the economic consequences were not confined to Iran. Energy markets, global supply chains, shipping insurance, and international trade were all affected. The conflict demonstrated that economic warfare can be as consequential as conventional military action, particularly when a strategic maritime chokepoint such as the Strait of Hormuz is threatened.

The Military Mindset and Growing American Concerns

In the United States, doubts have emerged about the war's direction and sustainability. Reports and commentary involving senior military figures and major American newspapers have reflected concerns that a prolonged conflict may not produce proportional strategic dividends. The principal military concern is that the original war aims appear increasingly distant while the operational, financial, and logistical burdens continue to grow. There is also an element of fatigue among personnel deployed at sea for prolonged periods, particularly those operating under continuous alert conditions. Aircraft carriers and other major assets require maintenance and rotation, while American forces remain committed across numerous theatres worldwide, including Europe, East Asia, the Indo-Pacific, and the Middle East. This global dispersion limits the ability to concentrate overwhelming force against a single adversary for an extended period.

The Challenge of Boots on the Ground

Another major strategic limitation is the absence of a realistic ground-war option. A decisive conventional victory traditionally requires the ability to seize and hold territory through amphibious or airborne operations, establish a secure bridgehead, and then advance against the adversary. Such an approach would be exceptionally difficult against Iran because of its size, terrain, population, defensive depth, and geography. Iran is also fighting on its own soil and therefore possesses the advantages of home-field defense. The United States, by contrast, operates across considerable geographical distances and must protect its forces and bases from Iranian missiles and drones. Consequently, airpower and stand-off weapons can inflict substantial damage, but they do not automatically translate into political or strategic victory.

Cost-Effectiveness and Depletion of Strategic Reserves

The cost-effectiveness of the weapons being employed is another important dimension. Iran can rely on relatively inexpensive drones, missiles, small boats, and asymmetric tactics, whereas the United

States often responds with sophisticated and expensive interceptors, aircraft, naval systems, and air-defense weapons. In strategic terms, this can resemble using a cannon to kill a mosquito: the target may be destroyed, but the cost of doing so can be disproportionately high. Over time, such an exchange can place pressure on the war reserve, or strategic stockpile, of a major power. The ability of the American government and private-sector defense industries to rapidly replenish sophisticated weapons is therefore an important factor. If consumption exceeds production for a sustained period, strategic reserves may gradually decline, reducing flexibility for other contingencies.

Global Commitments and the Wider Strategic Balance

The United States must also consider its wider global commitments. American forces and military assets are distributed across numerous regions, while strategic competition with China and Russia continues. The war in Ukraine has already placed demands on Western military inventories, and tensions in East Asia and the South China Sea require continued American attention. A prolonged Iranian conflict therefore creates the risk of weakening the overall American military inventory and blunting its ability to respond decisively elsewhere. This is one reason why elements of the American military establishment may favor a reassessment of strategy, objectives, and the means being employed to achieve them.

Iran's Asymmetric Maritime Strategy and Exploitation of Geographic Vulnerabilities

Iran has increasingly relied upon asymmetric methods rather than attempting to match American forces platform for platform. Small or 'mosquito' boats, drones, missiles, coastal positions, tunnels, and maritime disruption can impose disproportionate costs on sophisticated naval forces. The geography of the Strait of Hormuz is particularly important because even limited disruption affects global energy markets and international shipping. The value of a supertanker or cargo vessel is enormous,

while insurance premiums and shipping costs can rise rapidly when the security of a maritime chokepoint is threatened. Iran therefore does not necessarily need to defeat the American military directly; it can attempt to impose sufficient economic and political costs to make continuation of the war increasingly difficult.

Israel, Regional Politics, and the Moral Dimension

Israel's role presents another strategic dilemma. Although Israel remains a key American ally, its direct and expanded participation in the war could produce political consequences throughout the Middle East. The continuing impact of the Gaza and Lebanon conflicts has affected Israel's regional standing and generated strong international criticism. Consequently, a more direct Israeli role in the Iran war could potentially increase sympathy for Iran among sections of the regional and international community. This creates a difficult calculation for Washington: military cooperation with Israel may increase operational capability, while politically it may also deepen regional opposition and complicate diplomatic efforts.

Pressure on the American Home Front

The political dimension is equally important. The United States is a democratic country with a free press, public debate, elections, and continuous scrutiny of government policy. A war without a clearly visible end is therefore generating political pressure, particularly when casualties, expenditure, weapon consumption, and economic consequences are expected to increase. The approaching midterm political environment adds another layer of pressure on the administration. By contrast, Iran's political system operates under very different conditions, and information about internal hardship and repression may not emerge with the same openness. External military pressure has also, at least temporarily, created a rally-around-the-flag effect in Iran, strengthening the position of the security establishment and clerical authorities against domestic opposition.

The foregoing analysis demonstrates that the conflict extends well beyond the immediate military contest between Iran and the United States. The interaction of military pressure, asymmetric warfare, economic constraints, maritime vulnerabilities, and political pressures is already producing consequences that reach beyond the battlefield. These dynamics are contributing to a wider regional realignment and generating broader economic and strategic repercussions, making it necessary to assess the conflict not only in terms of its conduct, but also in terms of its implications for the emerging regional and global order.

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The Emerging Regional Security Architecture

The US-Iran war has accelerated discussions of alternative regional security arrangements. A closer security relationship among Pakistan, Saudi Arabia, and Turkey, including the Mecca Joint Defense Agreement, could become an important element of the emerging regional architecture. Smaller Gulf and Middle Eastern states may increasingly seek collective security arrangements as they reassess the reliability and limitations of existing security umbrellas. Iran, meanwhile, may face a degree of regional isolation if it remains outside these emerging structures. Even if the kinetic phase of the war eventually ends, the economic, diplomatic, and strategic consequences for Iran could continue for a considerably longer period.

The Wider Economic and Global Consequences

The conflict also demonstrates that modern warfare does not remain confined to the battlefield. When a strategic maritime chokepoint through which a significant portion of global trade and energy flows is disrupted, the effects are transmitted throughout the international economy. The Strait of Hormuz is one such lifeline, while Bab el-Mandeb represents another major trade and energy corridor. Disruption in either location can increase energy prices, raise transportation and insurance costs, disturb supply chains, and create inflationary

pressure far beyond the immediate theatre of war. Thus, economic pain becomes both an instrument and a consequence of modern warfare.

No Clear Winner or Loser

At present, both sides have crossed swords and suffered significant injuries and losses, but a decisive defeat has not materialized on either side. There is therefore no clear winner or loser in the conflict so far. The war has nevertheless exposed important aspects of American military power, including both its enormous capabilities and its limitations when confronted with geography, asymmetric warfare, cost pressures, dispersed global commitments, and the difficulty of translating firepower into political outcomes. Iran, for its part, has demonstrated that a state with comparatively fewer resources can prolong a conflict and impose high costs through asymmetric methods and control or disruption of strategic maritime routes.

Strategic Center of Gravity and the Elusive Endgame

Ultimately, the decisive question is the identification and destruction of the adversary's center of gravity. Unless the political, military, economic, or social center of gravity that sustains an adversary is effectively targeted and weakened, the destruction of individual facilities or weapons systems may not produce regime collapse or strategic surrender. This is why victory remains elusive despite extensive military operations. The Iranian state has absorbed severe attacks while retaining its capacity to fight, whereas the United States faces the challenge of sustaining a costly campaign while preserving its global military reserves and political support.

The Nature of Modern Warfare

The most important lesson is that modern wars have different demands and multiple dimensions. A conflict cannot necessarily be decided through firepower alone. Contemporary warfare may combine conventional, unconventional, sub-

conventional, economic, cyber, information, maritime, political, and psychological dimensions. The matching of weapons across generations is therefore no longer sufficient to predict the outcome. A country does not need to possess satellites, aircraft carriers, or the most advanced platforms if it can exploit geography, concealment, asymmetric tactics, local support, and strategic vulnerabilities. The geography of the theatre and the location of the war's center of gravity can matter as much as the technological quality of the weapons being employed.

Conclusion

The Iran–America war therefore represents a complex contest of military power, endurance, economics, geography, diplomacy, and political will. Both sides continue to claim success, yet neither has achieved a decisive strategic victory. The

United States possesses overwhelming technological and military capabilities, but Iran has demonstrated the ability to exploit geography, asymmetric warfare, maritime chokepoints, and economic vulnerabilities. Iran, however, is itself economically and strategically constrained and could face prolonged isolation and severe economic consequences if sanctions and blockade measures continue. The ultimate outcome will depend not simply on who can destroy more targets, but on who can sustain greater strategic stamina, preserve political will, protect economic interests, and successfully address the adversary's underlying center of gravity. The conflict thus provides a powerful reminder that in modern warfare, firepower alone does not decide wars; victory requires the successful integration of military, economic, political, diplomatic, psychological, and unconventional instruments of national power.

