

# The Iran War and the Breaking Point of the Global Order

Iran is resisting not only for itself but also for the global south and for states that oppose colonialism.

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In-depth Report: IRAN: THE NEXT WAR?

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West Asia has experienced numerous crises in recent years. However, the process that started with the joint attack by the USA and Israel against Iran has a different nature than previous crises.

This war is not just a military conflict between two states. It is a multi-layered geopolitical breaking point ranging from energy security to global trade routes, and from financial markets to great power competition. For this reason, it is necessary to evaluate what is happening not only as a regional war but also as part of the transformation of the global system.

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The picture that emerged from the first days of the war is extremely controversial in terms of legitimacy. While diplomatic negotiations with Iran were continuing, a military operation was launched.

This shows that the discourse of the "rules-based international order," established after the Second World War and defended by the West for years, has in fact collapsed. When the relationship of trust between diplomacy and military power disappears, the international system loses its meaning.

As a matter of fact, even the discourse of the US administration regarding the goal of the war reflects this uncertainty. On the one hand, regime change was initially presented as an objective and later it was announced that this was not the goal. On the other hand, the Iranian people were openly called upon to rise up under any circumstances. On another day, it was stated that the purpose of the operation was only to limit Iran's military capacity. These contradictory statements show that the strategic goals in Washington are not clear.

Surveys reveal that only about 25 percent of the American people support the war. This rate is one of the lowest levels of support for a war in modern American history. In particular, the events in Gaza and the military operations carried out by Israel have created serious reactions in Western public opinion. Younger generations in the United States no longer form a social base that automatically supports global military interventions. As the effects of the interruption of energy flows in the Gulf begin to be felt by American consumers, the level of criticism directed at Trump will increase. At the same time, the impact of the Epstein files on American public opinion has raised questions about the legitimacy of this war, and the thesis that Trump initiated the war in order to reduce the pressure created by the Epstein files should not be ignored.

## The New Form of Modern Warfare

An important dimension of the Iran-Israel tension is the transformation of hybrid war into open conflict. Since 2007, assassinations of nuclear scientists and military officials in Iran have gradually increased. The purpose of these operations was to delay Iran's nuclear program, weaken its scientific and military command structure, and create psychological deterrence against Iran. In the attacks on June 13, 2025, this method reached a much more advanced level. Micro-kamikaze drones, precision-guided munitions, and high-tech special weapon systems were used in the operations. Such operations show that we have entered a new era in which the land, air, cyber, and cognitive domains of modern warfare are used together. Perception operations and propaganda have also become an important part of the war. While Western media constantly produces a narrative that Iranian society will collapse, the fact that large protests in Iran took place in support of the regime has shown that this narrative does not reflect reality.

On the other hand, US **Secretary of War Pete Hegseth** says that Iran has been almost completely destroyed and that the war is coming to an end. Trump also claims that the war will be a quick and easy victory. The Iranian administration does not confirm this picture. **Iranian Foreign Minister Abbas Araqchi** announced that they do not want a ceasefire and will not negotiate with the USA. When asked about the possibility of a ground operation by Trump, he laughed and challenged the idea by saying, "Let them come, we are waiting." If Iran's military capacity had truly been destroyed, it would be rational for Iran to seek a ceasefire. Iran's refusal to negotiate shows that its

capacity to fight has not completely disappeared.

In the first phase, Iran used cheap and fast munitions to saturate air defense systems, and then launched ballistic and hypersonic missile attacks, causing serious damage not only to Israeli military targets but also to US bases, ports, command-and-control centers, air defense radars, and missile batteries in the region. By placing the burden of the war on the wealthy Arab countries in the Gulf and targeting them on the grounds that they indirectly or directly supported US attacks, Iran paved the way for the consequences of the war to evolve into a global crisis and to put pressure on the United States and Israel.

## Iran's Unexpected Resilience

Looking at the military dimension of the war, Iran appears to have demonstrated much stronger resistance than expected. In the first week of the war, Iran seems to have achieved some of its objectives. Iran survived the first wave of attacks launched by the world's most powerful air armada, disabled some radar systems in Gulf countries and Israel, forced the attacking coalition to deplete its expensive air defense missile stockpiles, and effectively closed the Strait of Hormuz, seriously affecting global energy flows.

Iran implemented a gradual strategy in this process. The United States initially faced a long-term war of attrition against Israeli air superiority through Iran's use of low-cost missiles and UCAVs. Iran has achieved significant force multipliers by combining the experience and preparations it accumulated over the last 46 years since 1980 with the experience of the 12-day war that started on June 13, 2025, and most importantly with the technology and military assistance of Russia and China. It is important to note that Iran has developed its defense strategy under a siege psychology that has lasted for nearly half a century and has prepared for the possibility of continuous foreign intervention.

The eight-year experience of the Iran-Iraq War increased the resilience of the Iranian military system. During that war, Iran had to fight under heavy embargoes and therefore developed its asymmetric warfare strategy. In this context, its underground UHPC (*Ultra High Protected Concrete*) missile bases, estimated to number around 150, are among the most important strategic assets Iran possesses. On

the other hand, it should not be forgotten that Iran represents a civilization with nearly three thousand years of state tradition. Such societies often tend to unite rather than fragment in the face of external attacks. Indeed, this tendency has been visible in Iranian society since the first days of the war.

## The Logistics Problem of the USA

The first week of the campaign against Iran demonstrates how expensive and unsustainable modern wars have become. According to American open sources, the cost of the first four days of attacks has reached approximately 11 billion dollars. This amount includes the deployment of more than 12 warships and approximately 100 aircraft transferred to the West Asia from the United States and European bases, as well as \$5.7 billion spent on air defense interceptor missiles and \$3.4 billion spent on bombs and other ammunition. These figures do not include personnel expenses, training costs, or the use of strategic assets in the region.

In addition, the cost of military equipment lost or damaged by the United States during the first week of the war is estimated to be approximately \$3 billion. These losses include damage to three AN/TPY-2 missile defense radars (*one of which was confirmed to have been completely destroyed*), three to four F-15E Strike Eagle fighter jets, four MQ-9 Reaper UAVs, and an AN/FPS-132 early warning radar in Qatar. In addition, it is reported that many SATCOM (*Satellite Communication*) and SIGINT (*Signals Intelligence*) radomes were destroyed during attacks on US facilities in Kuwait, Bahrain, and Qatar.

However, the real strategic problem of the war is not the losses themselves but the capacity to produce ammunition. According to various analyses, interceptor missiles are being rapidly consumed in US air defense operations against Iran, and it is increasingly debated whether existing stockpiles will be sufficient for a prolonged war. The situation that emerges, particularly regarding the SM-2, SM-3, and SM-6 interceptor missiles used in Patriot PAC-3, THAAD, and Aegis systems, demonstrates that modern warfare is not only a contest of technology but also of stockpiles and production capacity.

Iran's use of ballistic missiles and large numbers of kamikaze UAVs is dragging these defense systems into a war of attrition. The use of multimillion-dollar interceptors against extremely cheap attack systems raises serious questions about sustainability on the defensive side. A large number of THAAD, Patriot, and SM-3 interceptor missiles were used in a short time to intercept Iranian attacks. This situation has led to a rapid depletion of interceptor missile stocks belonging to the United States and its allies. Since the production of these missiles is both limited and expensive, replenishing stocks in a short period of time is extremely difficult.

At the same time, radar and early warning infrastructures, which are critical for the functioning of air defense systems, have also become targets of Iranian attacks. Damage to sensor infrastructure significantly reduces the effectiveness of defensive systems. For this reason, the US Navy and allied forces in the region are establishing a new logistical order in order to replenish their air defense stocks. A significant number of destroyers and cruisers operating in the Gulf are being diverted to India or Diego Garcia in order to reload ammunition. This means that the ships will leave the region for approximately seven days. It is also increasingly clear that these systems may be insufficient against Iranian hypersonic missiles.

On the other hand, it is believed that the long-range precision strike ammunition stocks of the United States are approaching a critical level. The main munitions used by the United States against Iran are the Tomahawk cruise missile, launched from warships and submarines with a range of approximately 900 nautical miles, and the JASSM joint air-to-ground cruise missile, launched from aircraft with a range of approximately 600 nautical miles. According to open sources, the usable Tomahawk stockpile of the United States may have declined to around 2,000–2,500 missiles. The JASSM stockpile is estimated to be around 3,000. In short, the United States may have around 5,000 long-range cruise missiles remaining.

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Even this stockpile is limited for a prolonged air campaign against a large country like Iran. Furthermore, the United States must reserve the same munitions for deterrence against major powers such as Russia and China. In such a conflict, it is believed that these stocks could be depleted within only a few days.

For this reason, it should be expected that the United States will increasingly turn to cheaper JDAM (*Joint Direct Attack Munition*) glide bombs instead of expensive and limited cruise missiles. However, in order to use these bombs, aircraft must approach the target to a distance of approximately 30–40 nautical miles, which significantly increases the risk faced by pilots.

It is possible that Iran preserved parts of its air defense network in critical areas rather than deploying it completely during the first phase of the war. The objective may be to activate these systems at a stage when US and Israeli aircraft are forced to rely on short-range munitions. So far, Iran may have difficulty shooting down long-range missiles launched from afar, but aircraft themselves are far more vulnerable targets.

Another critical area is the production of explosives. There is also a production problem concerning high-energy explosives such as RDX and HMX, which are found in almost all modern warheads in the United States. While the United States produced half a million tons of explosives per day on ten production lines during the Second World War, today it operates with only two production lines.

Seeing this negative picture, the Trump administration continues to hold new meetings with defense industry companies in order to accelerate production. At the end of the first week of the war, Trump met with executives from BAE Systems, Boeing, Honeywell Aerospace, L3Harris, Lockheed Martin, Northrop Grumman, and Raytheon, and announced that agreements had been reached to rapidly increase the production of high-tech weapons.

Although the US administration argues that medium-term ammunition stocks are sufficient, it is becoming increasingly clear that if the war drags on, the decisive factor will not be military power but production capacity, in other words logistical capability.

## Impact of Iran's Strategy on Energy and Maritime Trade

While Iran directly targets Israel in the war it is waging with great effort, it also implements a strategy aimed at the military and economic infrastructure of the United States in the region. American bases, energy facilities, and logistical infrastructures in Gulf countries are at the center of these attacks. Iran's attacks on energy and economic targets have rapidly increased the geoeconomic dimension of the war.

Before the attack, the price of oil was about \$73. One week later it reached \$93. It reached \$120 at the end of first week of war. However, this may only be the beginning. Approximately one-fifth of the world's oil trade and LNG shipments pass through the Strait of Hormuz. Although Iran has not formally closed this passage, the strait has effectively become unusable due to extremely high risks. Ships trapped in the Gulf cannot exit because of insurance problems and safety concerns for crews. More than 200 VLCC (*Very Large Crude Carrier*) oil tankers are currently stranded in the Persian Gulf.

If this situation continues, oil prices may rise well above \$150 according to some scenarios. Similarly, Qatar's suspension of LNG exports following missile strikes on its production facilities has had a comparable effect.

The absence of Qatari energy supplies, on which Europe depends heavily, combined with the loss of Russian gas, creates a very grave situation. This crisis in the energy market may also place enormous pressure on the global financial system. Investment funds managing approximately \$220 trillion in assets operate within the global financial system. If even a small portion of these funds shifts toward energy markets, it could lead to extremely sharp increases in oil prices.

Rising energy prices directly affect economic activity in modern economies, because almost every sector—from industrial production to transportation—is dependent on hydrocarbon energy. At the same time, the disruption of trade in the Gulf negatively affects the supply of jet fuel and marine fuels used by the aviation and merchant fleets industry. A shutdown of Gulf-based bunker fuel supply would create serious disruptions.

According to the International Maritime Organization, approximately 20,000 sailors are currently trapped in the Strait of Hormuz. The number of container ships that have been forced to change their routes or remain waiting in the region has reached 170. The disruption

of traffic in the Strait of Hormuz directly affects the weekly container traffic of 650,000 TEU in the Gulf. The world's largest container lines—MSC, Maersk, CMA CGM, and Hapag-Lloyd—have suspended all operations in the Strait of Hormuz.

This development may affect not only energy markets but also global supply chains. There are serious safety and psychological risks for seafarers stranded on ships. The supply of fresh water, food, and fuel may soon become a major problem. The captains and officers on the bridge carry enormous responsibility.

## Shifting Global Geopolitical and Geoeconomic Balances

The US attack on Iran represents a strategic mistake. Iran is geographically an extremely difficult country. Its population is approximately 90 million, and most of its territory consists of mountainous terrain. For this reason, even if Trump considers it, a ground operation against Iran is not militarily realistic. Moreover, the United States lacks both the manpower and the political support necessary to invade Iran.

Iran, on the other hand, appears to be much better prepared for a prolonged war. Another important consequence of the war is the shift in global economic balances. Gulf countries have long been perceived as safe areas for investment. However, if a perception emerges that the United States cannot protect these countries, the capital flowing into the region may also be at risk. At the same time, Asian countries may begin searching for alternative sources of energy security. The energy crisis creates particularly serious risks for Europe.

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In recent years Europe has created its own energy crisis by distancing itself from Russian energy sources. The policy of shutting down nuclear power plants and turning to expensive LNG imports has made the European economy far more fragile. The Iran war may further increase this vulnerability.

Some economists argue that the European economy could shift from recession to depression and that high energy prices may even raise the risk of hyperinflation. If European government bonds were sold off by international investors, interest rates could rise dramatically, and a serious financial crisis could emerge.

With the Iran crisis, China may increase its energy cooperation with Russia, while countries such as Japan and South Korea may attempt to reduce their dependence on West Asia. This process could once again divide the world into two economic blocs. On one side there may be the United States and the traditional Western alliance, while on the other side Russia, China, and the BRICS countries.

Although there has been discussion about opening a “northern front” of the war through Kurdish groups, Trump has recently moved away from this option. In this context, the use of Kurdish groups by the United States against Iran could pose a serious security risk for Türkiye. Iran also recognizes this possibility and has taken a firm stance against organizations such as PJAK.

The ethnic balances in northwestern Iran will also play an important role in this process. It is noteworthy that demonstrations in Tabriz emphasized Turkish identity in a positive manner. The most important issue for Türkiye is the preservation of regional stability. It would be another mistake to provoke Azerbaijan into conflict with Iran.

Although it was stated that the UAVs sent to Nakhchivan were not sent by Iran, Aliyev’s statements were extremely problematic. The US and Israeli plans for the unification of Azerbaijan—which is geographically squeezed between Russia and Iran—with Iranian Azerbaijan may backfire. It should be taken into account that a significant part of the political elite in Iran consists of Azerbaijani Turks.

In such a scenario, it should not be expected that Türkiye, as a NATO member, would participate in the war and fight against Iran. Although alternative plans have reportedly been prepared in this direction, Ankara is far too experienced to fall into such a trap.

## US Aircraft Carriers in the Gulf

The decision of the United States to move its aircraft carrier group in the Mediterranean (*USS Gerald Ford*) through the Red Sea toward the Gulf must also be taken into consideration. Although crossing the Red Sea carries risks due to the Houthis, the United States may be taking this risk for several reasons.

The first reason may be to establish an air-operation architecture capable of putting pressure on Iran from multiple directions, even from long distances. If aircraft carriers are deployed in the Arabian Sea, the Red Sea, and the Eastern Mediterranean simultaneously, Iran could be pressured on multiple fronts.

The second possibility is that aircraft operating from these carriers may provide remote air support to Israel. Combat air patrol missions conducted by aircraft from US aircraft carriers could reduce Israel’s burden by providing early warning support.

The third possibility is deterrence rather than direct attack. The United States frequently uses aircraft carriers as instruments of psychological pressure and shows of force.

However, aircraft carriers cannot approach Iranian shores closely. Iran’s capabilities in ballistic missiles, submarines, cruise missiles, and drones pose serious threats to such large naval assets.

Another possibility is that if the Houthis (Ansarallah) enter the war fully and the Bab al-Mandeb Strait closes in a manner similar to Hormuz, thereby cutting maritime trade from the Indo-Pacific region, a military operation against Yemen could also be considered.

Another option would be to relieve the Lincoln Carrier Strike Group and send its escort ships—especially those that have exhausted their ammunition stocks—to Diego Garcia or Indian ports for resupply.

## Conclusion

The war has completed its first week at the time these lines are written. The United States and Israel have not achieved the quick and decisive victory they expected. The conflict is gradually transforming into a long and exhausting war rather than a short-term operation.

This situation pushes the Washington administration to search for a new success story that can be presented to the public. Trump’s recent statement that “the fall of Cuba is now only a matter of time” is remarkable in this context. The failure to achieve a rapid result on the Iranian front may have triggered the search for a symbolic and rapid victory against a weaker target.

Despite the narratives presented by Hegseth and Trump, the reality on the ground appears to be different. Iran has long prepared for a war of attrition, and the Strait of Hormuz stands at the center of its strategy.

Although the United States and Israel have used intense firepower and targeted Iran’s underground bunkers during the second phase of the war, achieving decisive results does not appear easy. Iran aims to prolong the war and increase the military, economic, and political costs for the opposing side by relying on this deep defensive structure.

Moreover, the fact that the United States has already used thousands of precision munitions creates an additional problem concerning the sustainability of the war, considering the long production cycles required to replenish these weapons.

In addition, the possibility that NATO could be drawn into the war through Azerbaijan and Türkiye via false-flag operations should not be ignored. However, global public opinion is increasingly reacting against the events in Gaza and against US policies that rely more and

more on brute force.

Even if governments make decisions under pressure, public support will gradually weaken. Rising criticism in Spain and Indonesia's consideration of withdrawing from Trump's Gaza Peace Committee are early signs of this trend. The Shiite uprising that has begun in Bahrain should also be followed carefully.

As a result, Iran should not be expected to surrender quickly. The Hormuz crisis is not merely a market fluctuation affecting oil prices but a real supply shock directed at the main logistical artery of the global energy system.

Therefore, the Iran war cannot be seen solely as a regional conflict. It represents a historical tipping point that could have profound effects on energy markets, the financial system, and the global balance of power.

What is happening in Iran today is not only a war but also a painful harbinger of a new era in which Western hegemony is beginning to unravel and the world is gradually moving toward a multipolar order.

Iran is resisting not only for itself but also for the global south and for states that oppose colonialism.

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