

THE FAILURE OF THE ISRAEL-INDUCED US WAR ON IRAN

Strategic Consequences for European Security and the Acceleration of Post-US-NATO Architecture

I. OPERATION EPIC FURY: A WAR THAT CANNOT BE WON

In spite of far-reaching results on Iranian nuclear disarmament negotiations obtained in Geneva, as reported by Omani Minister of Foreign Affairs Sayyid Badr Al Bu Saidi to Vice President JD Vance on 28 February 2026, Israel and its lobby in the US managed to push the United States to launch Operation Epic Fury. In its first 24 hours, the attack hit over 1,000 targets in Iran, killing Supreme Leader Khamenei and senior IRGC commanders. However, a few weeks later, The Economist changed the operation's name: *Blind Fury*. The stated US objectives shifted repeatedly: pre-empting an Iranian attack, again destroying nuclear infrastructure, enabling regime change. None of these objectives were either true or obtained. Five weeks into the war, Iran has not collapsed, the Strait of Hormuz is effectively controlled by Iran, oil is trading above \$107 per barrel, the United States faces a structural military and diplomatic impasse, its Gulf allies remain wounded and undefendable, and Israel's Iron Dome appears increasingly penetrable. While the US rapidly loses its own air defence capacity, Israel wrestled itself in wars on four fronts. The Israeli/US attack on Iran is globally considered as illegal. The EU Member States refused President Trump's request to join. American immorality reached new heights with the revelation of intensive betting on war acts – apparently including by US Secretary of War Hegseth, himself.

Sources: CSIS, Assessing the Air Campaign After Three Weeks, 13 March 2026; Financial Times, 1 April 2026, no joke

THE KILL BOX: US NAVAL ASSETS IN A CONSTRAINED THEATRE

Two carrier strike groups — USS Abraham Lincoln (CVN-72) and USS Gerald R. Ford — were deployed to the region ahead of the strikes, representing the largest US naval concentration in the Middle East since the 2003 invasion of Iraq. President Trump presented this deployment as a show of force. It turned out to be a demonstration of structural vulnerability.

The Strait of Hormuz is 21 nautical miles wide at its narrowest point, with Iranian territory on the northern shore and Omani on the southern. Iranian shore-based anti-ship missile batteries, drone swarm platforms, and submarine assets including various types of more or less advanced (some apparently US produced) mines operate from fixed positions with pre-calculated firing solutions against any vessel transiting the strait. In this environment a carrier strike group is not a deterrent — it is a target set: according to US Commanders, sailing into the Gulf is sailing into a “kill box” with up to 35% vulnerability.

Unlike the US, Iran prepared for this war since years and to the greatest detail. Its phased strategy includes initial saturation of expensive air defences with cheaper ballistic missile and drone barrages; by Day 10, Iran switched to high-impact penetration strikes using missiles with payloads of 1,000kg or more — specifically designed to defeat layered intercept architecture through mass and precision simultaneously.

Sources: JINSA, Iran's Evolving Missile and Drone Threat, February 2026; IRGC commander statement, AFP, 10 March 2026; The Firebrand Project, 28th March, 2026

AIR DEFENCE DEPLETION: THE ATTRITION TRAP

The US entered this war with a deliberate surge of THAAD batteries, Patriot systems, and carrier-based air assets. Initial intercept rates against Iranian salvos reached 80–90 percent. This figure, cited by US and Israeli officials as evidence of success, obscures the core strategic problem: intercept rates are inherently unsustainable in a prolonged war of attrition.

Each Tomahawk costs approximately \$3.5 million. Each JASSM costs approximately \$3.5 million. Iran's Shahed-series drones cost under \$50,000 each. Iran's drone production capacity, built through the Ukraine war experience and North Korean component supply chains, allows attrition at a cost ratio that the United States cannot sustain indefinitely. The Economist, in its cover analysis titled 'Operation Blind Fury', identified this asymmetry as the central structural flaw: the war depletes American high-cost interceptors and precision munitions faster than Iran depletes its launch capacity.

AWACS and radar coverage — the essential warning architecture for intercept operations yet decreasingly effective after Iranian drone attacks — was provided in part from NATO Airborne Warning platforms operating from Konya Airport, Turkey. Turkey subsequently denied facilitating US and Israeli strikes. This denial, if sustained, creates a critical gap in the integrated air picture over eastern Iran. Turkey apparently has joined Italy and Spain in refusing any base or overflight support for President Trump's armed forces.

Sources: The Economist, 'Operation Blind Fury' cover, March 2026; JINSA, The Eroding Shield: Air Defenses Against Iran, March 2026; CSIS, Assessing the Air Campaign, 13 March 2026

IRAN'S STRATEGIC DEPTH: 90 MILLION PEOPLE, NOT IRAQ

The analytical failure at the heart of Operation Epic Fury is the assumption that Iran could be shocked into collapse or compliance as Iraq was in 2003. This assumption is unsustainable. The United States deployed 250,000 troops for the invasion of Iraq — a country of 40 million people with a military that had been systematically degraded by 12 years of sanctions and no-fly zones. Iraq was pacified only in the narrowest military sense, at a cost of two decades of occupation, over 4,000 US military deaths, and an estimated \$2 trillion in direct expenditure — and the outcome was the emergence of Iranian strategic dominance over Baghdad.

Iran has a population of 90 million, a battle-tested military hardened by the Iran-Iraq war and four decades of proxy conflict management across Lebanon, Iraq, Syria, and Yemen, dispersed missile infrastructure across a territory four times the size of Iraq, and a domestic defence industrial base that produces ballistic missiles, drones, and naval mines at scale. The current US forward deployment — approximately 3,500 Marines from the USS Tripoli amphibious task force, plus elements of the 82nd Airborne — is not a force that can pacify, occupy, or coerce a state of this scale. It is a tripwire force whose principal strategic risk is providing Iran with high-value targets.

Sources: Al Jazeera, Trump pretty sure of Iran deal, 30 March 2026; NPR, Trump grants Iran deadline extension on Hormuz, 26 March 2026

II. THE DIPLOMATIC DEADLOCK: 15 POINTS VERSUS 5 POINTS

Washington's 15-point peace plan, transmitted to Tehran via Pakistan as mediator, includes: a one-month ceasefire; full handover of Iran's highly enriched uranium stockpiles; a halt to further enrichment; caps on Iran's ballistic missile programme; an end to support for regional proxies; and the reopening of the Strait of Hormuz. Sanctions relief is offered in return, though restricted to nuclear-related measures and conditional on compliance.

Iran's five-point counter-proposal, published by Press TV and confirmed by Iranian officials, demands: a complete halt to all US and Israeli strikes and assassinations of Iranian officials; binding mechanisms guaranteeing no resumption of hostilities; payment of war reparations; an end to attacks on Hezbollah and Iraqi pro-Iranian militias; and formal international recognition of Iranian sovereignty over the Strait of Hormuz.

As India's World analysis concluded with precision: 'The gap between the two sides is structural. The United States is linking a ceasefire to a rollback of Iran's capabilities. Iran is linking a ceasefire

to security, sovereignty, and compensation. These positions do not overlap.’ A Pakistani source close to the Islamabad Government observed that the US plan is a formalised surrender by Iran. The US has signalled to Islamabad that Iran’s proposal is a non-starter. President Trump’s language on progress in ‘negotiations’ is widely considered baseless and non-sensical; it is rather a coverage for US withdrawal under pressure of strategic blunders, global economic turmoil and loss of allies – all benefiting China.

Iran’s military spokesperson Lt. Col. Ebrahim Zolfaghari framed Tehran’s position with deliberate contempt: “The one claiming to be a global superpower would have already gotten out of this mess if it could. Don’t dress up your defeat as an agreement. Your era of empty promises has come to an end.”

Trump, simultaneously, claimed on Truth Social that Iran had agreed to “most of” the 15 points” and extended his deadline on Iranian energy infrastructure strikes by 10 days to 6 April 2026.

Tehran denied any negotiations were taking place. In fact, only Pakistan’s army chief Field Marshal Asim Munir continues to serve as the sole functional channel between Washington and Tehran.

Sources: Al Jazeera, Iran calls US proposal maximalist, unreasonable, 25 March 2026; India’s World, Trump’s 15-Point Plan and Why Iran Rejected It, 29 March 2026; Time, Trump peace proposal, 25 March 2026; NPR, 26 March 2026; Al Jazeera, Can Pakistan-led efforts end the war, 30 March 2026

THE HORMUZ SOVEREIGNTY DEMAND: IRAN’S NON-NEGOTIABLE

Iran’s insistence on international recognition of its sovereignty over the Strait of Hormuz is not a negotiating position — it is a structural demand that no US administration can accept without ending the Petrodollar architecture and the legal basis for freedom of navigation that underwrites US global power projection. Iran’s parliament has meanwhile advanced legislation to formally codify this sovereignty claim and establish a fee regime for safe passage. Iran has already begun selectively granting passage to Indian, Pakistani, and Chinese-flagged vessels — a geopolitical signal of the first order.

The Strait of Hormuz carries approximately 20 percent of global oil supply and 20 percent of global LNG. With Brent crude above \$107 per barrel (from a pre-war price of approximately \$65), the energy shock is already propagating through European industry, emerging market debt, global shipping insurance markets and indeed vulnerable African and Asian economies. This is not a regional conflict. This is a global economic and social disaster.

Sources: NPR, Trump grants Iran deadline extension, 26 March 2026; Al Jazeera, US-Iran mediation: what are each side’s demands, 25 March 2026; The Economist, Advantage Iran, 28 March 2026

III. THE ECONOMIST’S VERDICT: ADVANTAGE IRAN

The Economist, whose analysis carries weight in European chancelleries even when its prescriptions are contested, has now published two successive cover assessments of the war that represent a significant public verdict on US strategic failure.

The first cover, ‘Operation Blind Fury’, depict Trump in a military helmet pulled over his eyes — a direct visual judgment that Washington entered the conflict without clarity of purpose or realistic assessment of consequences. The editorial argued that the war ‘diminishes Trump’s three political superpowers: his ability to impose his own reality on the world, his remorseless use of leverage and his dominion over the Republican Party.’

The second cover, ‘Advantage Iran’, published after five weeks of bombardment, declared that ‘a month of bombing Iran has achieved nothing’ and that strategic advantage has passed to Tehran.

The visual depicted an Iranian-flag ring squeezing a globe — a reference to Hormuz control as the decisive leverage instrument.

Trump's Economist/YouGov net approval on Iran has collapsed to -17 among all Americans, with Independents at -39. Three-quarters of Americans are concerned about US over-involvement. This domestic erosion is structurally significant: it constrains Trump's escalation options and accelerates the timeline to a negotiated exit on terms increasingly shaped by Iranian conditions.

Sources: The Economist, Operation Blind Fury, March 2026; The Economist, Advantage Iran, 28 March 2026; Economist/YouGov Poll, March 2026; HuffPost, Economist Trump Iran cover, March 2026

IV. GULF STATE RECALCULATION: THE END OF THE US SECURITY UMBRELLA

The Gulf Cooperation Council States entered this war as reluctant co-belligerents. Saudi Arabia, the UAE, Kuwait, and Bahrain provided intercept data and air defence cooperation but blocked US use of their bases and airspace for offensive strikes against Iran — forcing US strike aircraft to operate from carriers. Italy similarly refused US strike aircraft landing rights at Sigonella. This is not allied solidarity. It is managed exposure.

Iran's retaliatory strikes have targeted Gulf energy infrastructure directly: Israeli strikes on Iran's South Pars gas field triggered Iranian retaliation against Ras Laffan Industrial City in Qatar — the world's largest LNG export facility, shared with Iran's own offshore fields. Saudi Arabia and UAE infrastructure has also been damaged. The Gulf states are absorbing Iranian retaliation as a consequence of hosting US assets, without the US providing the security guarantee that was supposed to justify that hosting. So far the Gulf States did not retaliate against Iran. Rather, during a Foreign Ministers Summit in Riyadh, Saudi Arabia, its Defence Agreement partner Pakistan, Egypt and Turkiye aspired to bring President Trump into direct negotiations with Iran. The lacking results have been discussed above.

So the strategic conclusion being drawn in Riyadh, Abu Dhabi, and Doha is based on this reality: Iran has been selectively allowing Chinese, Indian, and Pakistani-flagged vessels through the Strait while blocking Western and Israeli shipping. China brokered the Saudi-Iran normalisation of March 2023. China is Iran's primary oil buyer, absorbing over 90 percent of Iranian crude exports at discounted prices. Beijing's Foreign Minister Wang Yi has expressed full support for Pakistan's mediation initiative. The Gulf states are watching this development and calculate accordingly. Therefore, the GCC States are expected to review their security relationships with both China and the EU as a direct consequence of this war. It is now understood that also Japan follows this calculus. The US has demonstrated to all that it will initiate regional conflicts without consulting any allies, expose their infrastructure to retaliation, and then demand their assistance in extracting itself. This is not a foundation for any durable alliance.

Sources: Yeni Safak, The Economist declares Advantage Iran; Al Jazeera, US-Iran mediation; Fox News, Gulf coalition intercept data, March 2026

V. ISRAEL'S FOUR-FRONT IMPOSSIBILITY

Military experts agree: Israel cannot successfully prosecute four simultaneous wars. The operational reality around Operation Epic Fury is that Israel is fighting in Iran, destroying parts of Lebanon formally to put pressure on Hezbollah (with Israeli forces advancing toward the Litani River), staging ongoing military operations in Gaza and facing attacks by Houthis. Each theatre has its own attrition logic, its own missile exposure, and its own demand on Iron Dome intercept capacity.

Iron Dome was designed for short-range rocket defence at a rate calibrated to Hamas and early Hezbollah salvos. It is not architecturally equipped to sustain simultaneous intercept requirements across three of the four theatres against increasingly sophisticated Iranian-supplied systems. Iran's use of cluster munition warheads — deployed in ballistic missiles targeting Israeli residential areas — spreads damage across a 10km radius even when the missile itself is intercepted. The architecture leaks not because of technical failure but because of saturation physics: no layered defence system maintains integrity against simultaneous multi-vector high-tempo attack indefinitely.

By Day 10 of the war, Iran had fired 300 missiles at Israel, nearly half with cluster submunitions. Nine Israeli civilians were killed in a single strike on Beit Shemesh on 1 March. The pace of Iranian missile fire against Israel has declined — attributed to launcher suppression — but Iran's penetration efficacy is said to have improved from 3% to 27%. These penetration strikes are designed to defeat rather than overwhelm the intercept architecture.

Israel's defence minister Israel Katz has announced continued strikes on Iran for 'weeks' with thousands of targets remaining. President Trump once again follows Israel's logic of continued war — to deny any enemy to recover. But neither Israel nor the US has a path to Iranian capitulation through air power alone; Israel nor the US has the required ground force capable of operating in Iran; both face growing domestic pressure as the economic and civilian costs accumulate.

Sources: Wikipedia, 2026 Iranian strikes on Israel; Al Jazeera, What are Iran's weapons, 1 March 2026; NPR, 26 March 2026; NBC News live blog, 26 March 2026; The Firebrand Project, March 2026

VI. TRUMP'S BINARY: WARSHIP VULNERABILITY OR CEASEFIRE ON IRANIAN TERMS

President Trump faces a strategic binary with no good exit.

Option one is escalation: striking Iranian energy infrastructure as repeatedly threatened, deploying additional ground forces, and attempting to force Iranian capitulation through maximum pressure. This option risks direct Iranian retaliation against US carrier strike groups in a constrained maritime environment where Iranian penetration rates against air defence are demonstrably increasing. A carrier strike group hit by an Iranian ballistic missile — even without sinking — would be the most consequential military event since Pearl Harbor. The political consequences for Trump domestically and for US global credibility would be close to terminal.

Option two is a ceasefire negotiated through Pakistan on terms substantially closer to Iran's five points than to Washington's 15. This means accepting Iranian sovereignty claims over Hormuz in some form, providing security guarantees against resumption, and paying reparations — or accepting the continued closure of the Strait and a sustained \$100+ oil price environment that destroys Trump's economic narrative. Trump has already blinked twice on his energy infrastructure strike deadline, extending it by 10 days on 26 March and in his speech signalling further flexibility. But also a desperate urge to show muscle by "hitting them extremely hard"...."bringing them back to the Stone Age"..."If there is no deal, we shall target all electricity facilities".

President Trump still appears unable to choose. His usual double down policy has always worked in the US: why not in Iran?

The Economist framing is precise: Trump entered this war believing he could impose his reality through leverage. Iran has absorbed the strikes, maintained Hormuz closure, shifted to high-impact penetration tactics, rejected the 15-point framework, and continued exporting oil to China. The leverage has not worked. Trump is the prisoner of a war he cannot win and cannot exit cleanly.

Sources: NPR, 26 March 2026; India's World, 29 March 2026; The Economist, Operation Blind Fury and Advantage Iran, March 2026; JINSA, The Eroding Shield, March 2026

VII. THE US FAILURE AS WORLD POWER: CONSEQUENCES FOR EUROPEAN SECURITY

The 2026 Iran war is not an isolated policy failure. It is the visible culmination of a pattern: Afghanistan (2021 withdrawal), Iraq (permanent strategic failure), Libya (collapse into militia state), Syria (Russian and Iranian dominance), Ukraine (bilateral US-Russia negotiations without European participation), and now Iran. In each case, the United States has initiated or sustained military commitments it could not bring to a successful conclusion, and has expected allies to bear the reputational and physical consequences.

The operational exposure of this pattern is now acute. Gulf States blocked US use of their airbases for offensive strikes. Turkey denied facilitating AWACS coverage. Italy blocked US aircraft at Sigonella. Spain has denied any support. NATO allies have refused to help open the Strait of Hormuz at Trump's request, which he publicly characterised as cowardice. The Article 5 alliance is visibly fracturing under operational pressure, before any formal US withdrawal from NATO. Tonight President Trump did not announce US withdrawal from NATO — a scenario that moved from theoretical to plausible during his second term (read his anti-EU National Security Strategy document). Still his European allies face an immediate and existential security architecture decision. Surprisingly the instruments for that decision already exist, have been somewhat tested in the Coalition of the Willing framework, and were legally anchored in the Northwood Declaration of July 2025.

Sources: Comic Sands, Trump calls NATO allies cowards, March 2026; Wikipedia, 2026 US military buildup; The Economist, Operation Blind Fury, March 2026

VIII. THE EUROPEAN RESPONSE: NORTHWOOD, LANCASTER HOUSE 2.0, AND THE SACEUR QUESTION

THE NORTHWOOD DECLARATION (JULY 2025)

The Northwood Declaration, signed by British Prime Minister Starmer and French President Macron at the British Military's Northwood Headquarters on 10 July 2025 during a simultaneous Coalition of the Willing meeting, is the most significant bilateral nuclear agreement between European powers since the original Lancaster House Treaties of 2010. It establishes, for the first time, that UK and French nuclear forces “can be coordinated and contribute significantly to the overall security of the Alliance” and that “there is no extreme threat to Europe that would not prompt a response by our two nations.”

The UK-France Nuclear Steering Group, jointly chaired by senior officials from the UK Cabinet Office and the Presidency of the French Republic, held its inaugural meeting in Paris on 10 December 2025, with senior military personnel and officials from defence and foreign ministries. This is not a consultation mechanism. It is the embryonic architecture of a European nuclear coordination structure that does not depend on US extended deterrence. Indeed the British Northwood Headquarters include all required and tested Command and Control instruments. In France, parts of British nuclear weapons are produced.

Source: GOV.UK, Northwood Declaration, 10 July 2025; GOV.UK, Nuclear Steering Group inaugural meeting, 18 December 2025; CSIS, Northwood Declaration: Future of European Deterrence, 27 February 2026

MUNICH 2026: STARMER'S FIVE COMMITMENTS

At the Munich Security Conference on 14 February 2026, Starmer articulated five commitments that collectively describe a post-US European security architecture:

- Russia could be militarily ready to threaten NATO by the end of the decade — the current UK defence spending trajectory alone is insufficient
- European autonomy in defence is ‘the new law’ — a direct adoption of Macron’s Gaullist framing
- The UK will take over NATO Joint Force Command Norfolk from the US — a concrete transfer of command responsibility in the Atlantic and High North
- The UK will deploy Carrier Strike Group led by HMS Prince of Wales to the North Atlantic and High North in 2026 (Operation Firecrest) — alongside US, Canadian, and NATO allies
- The US nuclear guarantee ‘is no more’ — UK and France must now provide extended deterrence to European NATO members

This last point is the most significant. For the first time, a British Prime Minister has publicly stated that the US nuclear umbrella cannot be relied upon and that the UK-France nuclear forces must substitute for it. Combined with the Northwood Declaration’s operational coordination architecture, this is the foundation of a European minimum nuclear deterrent.

Sources: GOV.UK, PM speech Munich Security Conference, 14 February 2026; UK in a Changing Europe, Starmer’s Munich speech, 19 February 2026; France 24, Munich Security Conference live, 14 February 2026

A EUROPEAN SACEUR AND THE EU FORCE POSTURE

The appointment of a European Supreme Allied Commander — ending the 75-year convention of a US SACEUR — is the political signal that would formalise European strategic autonomy within or alongside a reduced NATO. The operational logic is: EU funds, directed by an EU-accountable military command, building force posture that does not depend on US political continuity. German industry experts point out that the immediate purchase of US military equipment already based in the EU would help sustain conventional defence, while adequate ‘lessons learnt’ equipment is rapidly produced within the EU and the UK.

This requires France to extend its nuclear deterrence doctrine beyond national borders — a step Macron has signalled willingness to take but has not constitutionally formalised. The Northwood Declaration provides the bilateral UK-France legal and political framework. EU defence funding mechanisms — PESCO, the European Defence Fund, and the proposed European Defence Industrial Strategy — provide the procurement architecture. The Coalition of the Willing provides the operational precedent.

Lancaster House 2.0, the expanded conventional cooperation agenda concluded in 2025, adds munitions co-production, air and missile defence integration, and industrial resilience to the nuclear coordination framework. The full architecture — from Dunkirk 1947 through Lancaster House 2010 through Northwood 2025 — is now in place for a European defence posture that can function without the United States. What now must follow is the political decision to activate it fully, and the decade of procurement investment required to make it operationally credible.

Sources: CSIS, Northwood Declaration, 27 February 2026; Nippon.com, A New Stage in European Security Cooperation, January 2026; IFRI, How should Britain and France cooperate to realise the Northwood Declaration, July 2025

IX. STRATEGIC CONCLUSIONS

- The US war on Iran has failed on its own terms. Regime change has not occurred. The nuclear programme has not been ended. Hormuz remains closed. Iran’s missile capacity has not been destroyed. The cost to the United States in munitions depletion, diplomatic isolation, and domestic political erosion is severe and accelerating.
- Trump faces a binary between warship vulnerability and ceasefire on Iranian terms. Both options damage US credibility. The ceasefire option — already being pursued through Pakistan — is more likely, but Iranian conditions are structurally incompatible with US demands. A settlement will be partial, contested, and humiliating.
- Iran has demonstrated the capacity to sustain a prolonged war of attrition that depletes US air defence interceptors faster than they can be replaced, targets Gulf energy infrastructure, and closes Hormuz as the decisive leverage instrument. The ‘kill box’ geography favours Iran.
- Israel cannot sustain four simultaneous wars. Iron Dome leaks under sustained multi-theatre pressure. A negotiated de-escalation is inevitable; its terms will be set more by Iranian conditions than by Israeli objectives.
- The GCC will recalibrate toward China and the EU. The US has demonstrated it initiates regional wars without consulting Gulf allies, exposes their infrastructure to retaliation, and then demands their assistance. This is not a sustainable alliance basis.
- US global superpower status is being visibly eroded. The Iran war joins Afghanistan, Iraq, Libya, and Syria as a pattern of military commitments that cannot be brought to successful conclusion. European governments are drawing the correct operational conclusion.
- A US NATO withdrawal, if announced, will accelerate the Northwood-Lancaster House architecture into operational deployment. Starmer’s Munich commitments, the Northwood Declaration, the Coalition of the Willing, and the emerging EU SACEUR framework provide the legal, institutional, and military foundation for a European security posture that does not depend on Washington.
- A joint Franco-British minimum nuclear deterrent, coordinated through the Nuclear Steering Group and directed by a sufficiently mandated European Supreme Commander Europe, accountable to EU member states, is the logical endpoint of the architecture already in place. The political decisions required to activate it are within reach. The procurement investment required to make it credible requires a decade. The urgency created by the Iran war and the NATO withdrawal risk compresses that timeline.

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