

The US-Israeli War on Iran: Three-Month Comprehensive Report on Political Dynamics

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Much earlier, Israel conducted a wave of attacks on Iran in June 2025, targeting several senior military officials and nuclear scientists, as well as nuclear facilities. The US then joined the 12-day war to bombard three nuclear sites in Iran. The war came on the eve of a round of planned negotiations between the US and Iran over Tehran's nuclear program. Earlier, on January 27, amid mounting tensions between the US and Iran, US President Trump had shown that the US was considering an attack against Iran in response to Tehran's crackdown on protesters, which had left thousands of people dead. Trump had sent the USS Abraham Lincoln aircraft carrier to the region.¹

Amid growing fears of a new war, a commander from Iran's Islamic Revolutionary Guard Corps (IRGC) had issued a warning to his country's neighbors for not allowing their territory to be used against Iran. Akbarzadeh, political deputy of the IRGC's naval forces, said that they will then be considered "hostile." Iran's currency falls to a record low against the dollar amid rising tensions. Since the conflict, Trump has reiterated demands that Iran dismantle its nuclear program and halt uranium enrichment, but talks have not resumed. But while the US military builds up its presence in the region, Iran has warned that it would retaliate if an attack were launched. Iran had warned that the consequences of a strike on Iran could affect the region.²

On January 28, the Trump administration said that all options, including military action, remain on the table in dealing with Iran, as the US and Israel look to change Tehran's ruling system. Iranian officials had warned that any US attack would draw a "swift and comprehensive" response.

The US military had also announced a major multi-day exercise in the Middle East, sharply rising tensions after weeks of unrest inside Iran, triggered by anti-government protests that began in late December.

The US Central Command said the drills would "demonstrate the ability to deploy, disperse, and sustain combat airpower across" the Middle East, underscoring operational readiness across multiple locations.

President Trump said earlier that the US had an "armada" heading toward Iran, though he added that he hoped it would not be used. The warships began deploying from the Asia-Pacific region earlier this month as tensions rose over Iran's crackdown on protests.

Trump had previously threatened to intervene if Iranian authorities continued to kill protesters. Later, he said he had been told that killings were subsiding and that there was currently no plan to execute prisoners.

In addition to the carrier and warships, the US had moved fighter jets and air-defense systems to the region. The US military said the exercise would show its ability to deploy and sustain

airpower across the Middle East. Meanwhile, a senior Iranian official said that Tehran would view any attack as an “all-out war against us.”

Meanwhile, the United Arab Emirates (UAE) said that it would not allow its airspace, territory, or territorial waters to be used for any hostile military actions against Iran. The US military’s Air Base is a key hub for US Air Force operations in the region.³

By February 26, the US had assembled an armada within striking distance of Iran, including the aircraft carrier USS Abraham Lincoln and its strike group. The USS Gerald R. Ford and its escorts also headed to the region. The two ships together could carry more than 5,000 personnel and 150 planes.

Earlier, on February 23, Iranian students defied authorities with protests for a third day, weeks after security forces crushed mass unrest with thousands killed, and as the US weighs possible air strikes against the Islamic Republic.⁴ In a new sign of the mounting tension in the Middle East, the US began pulling non-essential personnel and family members from the embassy in Beirut. President Trump had repeatedly threatened Iran since major nationwide protests across the country in January, saying that “really bad things will happen” if talks between the countries do not produce a deal.

The Trump administration wanted Iran to give up much of its nuclear program, which it believes is aimed at building a bomb, limit the range of its missiles to short distances, and stop supporting groups it backs in the Middle East. It has built up forces across the Middle East, putting increased pressure on Iran as it weighs its response to US demands amid ongoing talks.

Iranian Supreme Leader Ayatollah Ali Khamenei then faced the gravest crisis of his 36-year tenure, with an economy struggling under international sanctions and growing unrest that erupted into major protests in January. On February 23, Iranian President Pezeshkian said negotiations with the U.S. had “yielded encouraging signals” even as a second U.S. aircraft carrier headed towards the Middle East.

Trump has not laid out in detail his thinking on any potential strike against Iran. There was still no “unified support” within the administration to go ahead with an attack.⁵

In an important development, the media had reported Pentagon concerns about the intended war against Iran. Alexander Ward, Lara Seligman, and Shelby Holliday, in their article entitled “Pentagon Flags Risks of a Major Operation Against Iran” published in the Wall Street Journal on February 23, said that the Pentagon had raised concerns to President Trump about an “extended military campaign against Iran, recommending that war plans being considered carry risks including US and allied casualties, depleted air defenses, and an overtaxed force”.⁶

The warnings had been voiced by Gen. Caine, the chair of the Joint Chiefs of Staff, within the Defense Department and during meetings of the National Security Council, current and former officials said. Still, other Pentagon leaders had also noted similar concerns.⁷

As expected, on February 24, President Trump lashed out at media reports saying that General Caine had warned him of potential risks of attacking Iran, including becoming entangled in a prolonged conflict and the possibility of US casualties. Trump responded to the reports in a social media post earlier, saying that Caine believed a war with Iran, which the president had threatened with a military attack if it did not accept a series of demands, could be “easily won”.⁸

It was clear that President Trump had been mulling an attack on Iran for weeks, concentrating an enormous array of US forces in the Middle East in preparation for a war.⁹

Julian E. Barnes, David E. Sanger, Tyler Pager, and Eric Schmitt, in their article, “Trump Considers Targeted Strike Against Iran, Followed by Larger Attack,” *The New York Times*, February 22, 2026, said that:¹⁰

The top negotiators plan to meet in Geneva on Thursday for final talks on a new proposal that could create an off-ramp, as two carrier groups massed within striking distance of Iran. President Trump has told advisers that if diplomacy or any initial targeted U.S. attack does not lead Iran to give in to his demands that it give up its nuclear program, he will consider a much bigger attack in the coming months intended to drive that country’s leaders from power, people briefed on internal administration deliberations said. Negotiators from the United States and Iran are scheduled to meet in Geneva on Thursday for the final negotiations to avoid a military conflict. But Mr. Trump has been weighing options for U.S. action if the negotiations fail. Though no final decisions have been made, advisers said, Mr. Trump has been leaning toward conducting a first strike in the coming days intended to prove to Iran’s leaders that they must be willing to agree to give up the ability to make a nuclear weapon.

Trump was being encouraged to strike Iran by many hawkish right-wing leaders who wanted strong US action resulting in regime change in Iran. They wanted nothing less. Retired General Keane said that the US and Israel have a historic opportunity for regime change in Iran. The US and Israel have a historic opportunity to bring about the collapse of Iran’s current government rather than extend its life through negotiations.

“In my judgment, we should do nothing to extend the life of this regime when we have a historic opportunity right now, given that it is so weak, to set the conditions for a regime collapse. We have never been in this position in 46 years,” said the former vice chief of staff of the US Army and senior strategic analyst. Iran has lied to the US for decades, and negotiating with Tehran only “throws them a lifeline,” he argued, adding that Tehran’s government is weak, making now the right moment to set conditions for its collapse. He said that “if Tehran-

Washington negotiations did not produce a substantive deal, Iran should be added to a comprehensive list of targets in a possible military operation, which he believes is likely. Keane suggested that “if Iran’s government fell and was replaced with one more aligned with US interests, the region could see enduring peace and stability.” He acknowledged “Iran keeps some capacity for retaliation and said the US was positioning resources in the region to protect its bases and Israel.¹¹

President Trump said on February 19 that he was giving Iran 10 days to reach an agreement over its nuclear program or face military action. The US was preparing for the possibility of sustained, weeks-long operations against Iran if Trump orders an attack.

Meanwhile, Iran was making desperate preparations to defend itself from American and Israeli attacks. It is seeking help from Russia and China. Iran is close to a deal with China to buy anti-ship cruise missiles, just as the US deployed a vast naval force near the Iranian coast ahead of strikes on Iran.

The deal for the Chinese-made CM-302 missiles is near completion, though no delivery date has been agreed, the people said. The supersonic missiles have a range of about 290 kilometers and are designed to evade shipborne defenses by flying low and fast. Their deployment would significantly enhance Iran’s strike capabilities and pose a threat to US naval forces in the region.

Negotiations with China to buy the missile weapons systems, which began at least two years ago, accelerated sharply after the 12-day war between Israel and Iran in June. As talks entered their final stages last summer, senior Iranian military and government officials, including Massoud Oraei, Iran’s deputy defense minister, travelled to China.¹²

The missiles would be among the most advanced military hardware transferred to Iran by China and would defy a UN weapons embargo first imposed in 2006. The sanctions were suspended in 2015 as part of a nuclear deal with the US and allies and then reimposed last September.

The potential sale would underscore deepening military ties between China and Iran at a moment of heightened regional tension, complicating US efforts to curb Iran’s missile program and nuclear activities. It would also signal China’s growing willingness to assert itself in a region long dominated by US military might.

China, Iran, and Russia hold annual joint naval exercises, and last year the US Treasury Department sanctioned several Chinese entities for supplying chemical precursors to Iran's Islamic Revolutionary Guard Corps for use in its ballistic missile program. China rejected those allegations, saying it was unaware of the cases cited in the sanctions and that it strictly enforces export controls on dual-use products.

While hosting Iranian President Pezeshkian for a military parade in Beijing in September, Chinese President Xi Jinping told the Iranian leader that "China supports Iran in safeguarding sovereignty, territorial integrity and national dignity.”

China joined Russia and Iran in a joint letter on October 18, saying that they believed the decision to reimpose sanctions was flawed.

The CM-302 purchase would be a significant improvement in an Iranian arsenal depleted by last year's war. China's state-owned China Aerospace Science and Industry Corporation (CASIC) markets the CM-302 as the world's best anti-ship missile, capable of sinking an aircraft carrier or destroyer. The weapons system can be mounted on ships, planes, or mobile ground vehicles. It can also take out targets on land.

Iran is also in discussions to buy Chinese surface-to-air missile systems, so-called MANPADS, anti-ballistic weapons, and anti-satellite weapons. China was a major arms supplier to Iran in the 1980s, but large-scale weapons transfers dwindled by the late 1990s under international pressure. In recent years, US officials have accused Chinese companies of providing missile-related materials to Iran but have not publicly accused them of supplying complete missile systems.¹³

Meanwhile, President Trump was growing increasingly frustrated with constraints on using military force against Iran. Military planners had advised that any strike on Tehran's assets would not deliver a decisive, one-off blow and could instead escalate into a wider, protracted conflict in the Middle East. Internal discussions had focused on the risks of retaliation and the possibility that limited strikes would fail to significantly degrade Iran's capabilities, potentially drawing the United States into a broader regional confrontation.¹⁴

In March, the US intelligence community assessed that Iran was not building a nuclear weapon. In June, the Trump administration nevertheless launched airstrikes targeting Iran's nuclear program.

Despite President Trump having repeatedly assured that those June airstrikes had "obliterated" its program, the US was contemplating more strikes on Iranian nuclear sites. President Trump and his team had rarely provided consistent rationales for using military force. The administration had repeatedly cited Iran's potential nuclear threat while floating the potential military force if Tehran did not cut a deal. But it was just eight months ago that Trump declared Iran's nuclear program to have been "obliterated."¹⁵

It was not about highlighting the success of a past mission but rather about building the case for a future one. Earlier, when Trump was first threatened to strike Iran again, the stated reason was that Tehran was killing protesters. But then the stated case is much more focused on nuclear issues.

Earlier, when White House press secretary Leavitt was asked last week why the US might have to strike Iran again even after its nuclear program was supposedly "obliterated," she responded: "Well, there are many reasons and arguments that one could make for a strike against Iran." The administration was still searching for a logically consistent one.¹⁶

The Trump administration still did not have a good enough rationale for striking Iran again. It kept on making different explanations of its actions.

Kevin Liptak, Kylie Atwood, Zachary Cohen, Jennifer Hansler, in their excellent article “Trump confronts his 3 main options on Iran — from diplomacy to trying to topple a regime”, published in CNN on February 24, had argued that:¹⁷

After ordering the largest American military buildup in the Middle East since the onset of the Iraq War, President Donald Trump now has a decision to make on Iran. The options before him now appear well established, confirmed in vague terms by the president himself during informal question-and-answer sessions over the last several weeks and described in more detail by people familiar with the matter. They range widely, with some carrying significant risks, and he hears sometimes conflicting advice from allies, advisers, and foreign counterparts...Top White House officials continue to say Trump’s preference is to secure a deal with Iran that avoids any military confrontation. His envoy, Steve Witkoff, and son-in-law, Jared Kushner, have been conducting indirect talks with Iranian officials over the past several weeks and will return to Geneva, Switzerland, on Thursday for another round. Both men have encouraged the president to allow time to see whether a deal is possible, though Witkoff said Saturday that Trump is “curious” as to why Iran has not “capitulated” in negotiations. Each side has drawn red lines, and some direct conflict. Trump says Iran should not be allowed to enrich any uranium. Iran says that it is its right, and insists its nuclear program is only for peaceful purposes. The Iranians are still working on a proposal that might bridge thatUS military personnel in the region are prepared to execute a range of operations should Trump give the order. The US military has the assets in place to conduct any of the potential strike options and has been making logistical preparations in the event Trump gives a final order.... If diplomacy fails, Trump could launch a far larger operation meant to topple the Iranian regime. There is already plenty of firepower positioned around Iran to carry out even the most extreme options available to the president...Chairman of the Joint Chiefs Gen. Dan Caine and other military leaders have raised concerns about the scale, complexity, and potential for US casualties that could result from a major, extended military operation against Iran, according to multiple sources familiar with the matter. He and others inside the Pentagon have also warned about the potential strain such an operation would put on service members and assets deployed in the region, as well as how a protracted military campaign could further impact US weapons stockpiles, particularly as it relates to arms used in support of Israel and Ukraine,...Still, any strikes intended to seriously threaten the regime’s future hinge, in large part, on understanding what comes next. The Trump administration does not appear to have a clear picture of who will replace the leadership if the US successfully conducts regime change, and its visibility inside the country’s opposition groups appears limited. Nor has Trump received any firm guarantee that even a massive US military operation inside Iran would result in the regime’s ouster. That lack of certainty has informed intensive sessions inside the White House Situation Room in recent days, as Trump debates his options. Many on Trump’s team are hopeful — if not entirely optimistic — that diplomacy will prevail, even if the outlines of an acceptable deal are still unclear. Still others in Trump’s ear

have insisted Iran is badly weakened, and the time for action is now. Now, at the brink. That is how we arrived at the brink, an inadvertent sequence of events and choices leaving little maneuvering room for Washington or Tehran. Short of a last-minute diplomatic breakthrough, which is unlikely, what happens next will be in the hands of Trump and Iran's Supreme Leader, Ayatollah Ali Khamenei, neither of whom — at this moment — seems prepared to build an offramp.

President Trump's decision to order airstrikes against Iran hinged in part on the judgment of Trump's special envoys, Steve Witkoff and Jared Kushner, about whether Tehran was stalling over a deal to relinquish its capacity to produce nuclear weapons, according to people familiar with the matter.

A final round of negotiations was held in February in Geneva. Yet ahead of what could be the final negotiating session, there were indications that positions were hardening.

Witkoff said that Trump's directive was to ensure Iran would keep zero nuclear enrichment capability — only for Iran's foreign minister, Araghchi, to say that Tehran was not prepared to relinquish enrichment.¹⁸

Trump said that he would rather have a deal than not, also warned the Iranian regime that if it doesn't make a deal, "it will be a very bad day for that Country and, very sadly, its people, because they are great and wonderful, and something like this should never have happened to them".¹⁹

Neither Kushner nor Witkoff was a professional and should not have been put in charge of sensitive and delicate negotiations with Iran. But President Trump thinks otherwise.

Meanwhile, both countries had engaged in shows of military force, with the US bolstering its military assets in the Middle East over the weekend. On February 24, the US partially evacuated its embassy in Beirut after a security review on the risks of military escalation in the region.²⁰

On February 26, negotiators from Iran and the US held the third round of indirect nuclear talks in Geneva, Switzerland. Tehran says that "important" and "practical" proposals were advanced during negotiations, according to Iran. The discussions take place amid a massive US military build-up in the Middle East, with several countries warning their citizens to leave Iran due to the threat of US attacks. During his State of the Union address on February 24, President Trump struck a belligerent tone but said he would prefer to resolve the standoff diplomatically. Iran has also said it wants to find a diplomatic solution, but will defend itself if the US resorts to military action. Foreign Minister Abbas Araghchi has said Iran remained "crystal clear" that it would "under no circumstances ever develop a nuclear weapon", while also recognizing the right of Iran's people to the benefits of "peaceful nuclear technology."²¹

Despite the threats and counter-threats, the US and Iran were interested in diplomacy and preferred to make a deal. Reading between the lines coming from both Tehran and Washington, sounds like diplomacy may have a chance of success. Iran had sent proposals to the US, and the

two sides have been engaging on the content. Iran was willing to make nuclear concessions beyond the 2015 multilateral deal known as the Joint Comprehensive Plan of Action (JCPOA) so Trump could have a better agreement than former President Obama. Iranian proposal during the indirect talks in Geneva focused on the lifting of US sanctions and dealing with US concerns. It included reducing uranium stockpiles to low-enrichment levels under IAEA supervision and included an aspect of achieving common interests, especially in the economic dimension.²²

Shamkhani, a prominent adviser to Iran's supreme leader, had suggested that an agreement could be reached if the negotiations focused solely on Iran's commitment not to develop nuclear weapons. He added that the Iranian foreign minister Araghchi, who was leading the talks for Tehran, had "sufficient support and authority to secure this agreement." If potential military action aimed to pressure Iran to make concessions in nuclear negotiations, it was not clear whether limited strikes would work. He said:²³

If the goal is to remove Iran's leaders, that will commit the US to a larger, longer military campaign. There has been no public sign of planning for what would come next, including the potential for chaos in Iran. There is also uncertainty about what any military action could mean for the wider region. Tehran could retaliate against the American-allied nations of the Persian Gulf or Israel. Oil prices have risen in recent days in part due to those concerns, with benchmark Brent crude now around \$70 a barrel. Iran, in the last round of talks, said it briefly halted traffic in the Strait of Hormuz, which carries about 20% of global oil and liquefied natural gas, and is situated at the narrow mouth of the Persian Gulf.

In hindsight, these were warnings that the US should have duly considered. But they were ignored instead.

Iran's foreign ministry said that:²⁴

Both in the nuclear field and on the lifting of sanctions, especially important and practical proposals were put forward, and both sides pursued the discussions with great seriousness. We are confident. We must continue and see. This is a process. Contradictory statements from foreign media and some American officials continue to fuel doubts. For us, the focus is on the outcome. We have been consistent, and our positions have been consistent with our words. Today's talks were profoundly serious, and we hope that tonight we will see the continuation of talks on the lifting of sanctions and the nuclear issue in a practical manner.

While Trump had said he preferred to solve the crisis through diplomacy, he has also said he is considering a limited strike on Iran to pressure its leaders to accept a deal.

Trump, however, has done little to explain what he is demanding in the negotiations and why there could be a need to take military action now, eight months after the US bombed Iranian nuclear facilities during a war between Israel and Iran. Iran had rejected the US demand to stop the

enrichment of uranium in its territory, but there have been indications that it is prepared to offer some concessions about its nuclear program.

In recent weeks, the US has sent thousands of troops and what Trump has described as an "armada" to the region, including two aircraft carriers along with other warships, as well as fighter jets and refueling planes. Trump first threatened to bomb Iran last month as security forces brutally repressed anti-government protests, killing thousands of people. But since then, his focus has turned to Iran's nuclear program, which has been at the center of a long-running dispute with the West.

For decades, the US and Israel have accused Iran of trying to secretly develop a nuclear weapon. Iran insists its program is only for peaceful purposes, though the country is the only non-nuclear-armed state to have enriched uranium at a near weapons-grade level.²⁵

In his State of the Union speech to Congress on February 24, Trump briefly and vaguely talked about the tensions with Iran, without clearly laying out the case for strikes. He said Iran was working to build missiles that would "soon" be capable of reaching the US, without giving details. He also accused the country of trying to "start all over again" with a nuclear weapons program following last year's strikes and said he could not allow the "world's number one sponsor of terror... to have a nuclear weapon".

The US struck three nuclear sites in Iran last June, as it joined Israel in its bombing campaign. At the time, Trump said the facilities had been "obliterated".

Iran said that its enrichment activity stopped after the attacks, although it has not allowed the International Atomic Energy Agency (IAEA) inspectors to access the damaged sites. "They want to make a deal," Trump said, "but we haven't heard those secret words: 'We will never have a nuclear weapon'."

Hours before the speech, however, the Iranian foreign minister posted on social media that Iran would "under no circumstances ever develop a nuclear weapon". Araghchi also said there was a "historic opportunity to strike an unprecedented agreement that addresses mutual concerns and achieves mutual interests".

Reacting to Trump's address, an Iranian foreign ministry spokesperson accused the US of repeating "big lies" about its nuclear program, ballistic missiles, and the number of protesters killed in the crackdown.

As expected, Foreign Minister Araghchi said Iran "will under no circumstances ever develop a nuclear weapon."

Iran's proposals had not been made public. Still, the discussions in Geneva could have included the creation of a regional consortium for uranium enrichment, which had been raised in previous negotiations, as well as ideas about what to do with Iran's roughly 400kg (880lb) stockpile of highly enriched uranium and verification and monitoring mechanisms.

In return, Iran expected the lifting of sanctions that have crippled its economy. Opponents of the regime say any relief would give the clerical rulers a lifeline.

But it stayed unclear which conditions Trump could have found acceptable for a deal. Iran had already rejected discussing limits to the country's ballistic missile program and ending its support for proxies in the region - an alliance Tehran calls the "Axis of Resistance" that included Hamas in Gaza, Hezbollah in Lebanon, militias in Iraq, and the Houthis in Yemen.

The Trump administration still did not have a sufficient rationale for striking Iran again. It kept offering different explanations for its actions.

Reports in US media had already suggested that Trump was considering a first strike in the coming days on the IRGC or nuclear sites to pressure the country's leaders. If negotiations failed, according to the reports, the president might go as far as ordering a campaign to topple the Iranian Supreme Leader, Ayatollah Khamenei.

General Caine, the Chair of the Joint Chiefs of Staff, warned that strikes against Iran could be risky, potentially drawing the US into a prolonged conflict, although Trump has insisted that Caine believes it would be "easily won".

Iran, meanwhile, had threatened to respond to any attack by striking American military assets in the Middle East and Israel. US-allied countries in the region were concerned that an attack on Iran could lead to a wider conflict and have warned that air power alone will not be able to change the country's leadership. In hindsight, the Trump administration did not take these Iranian threats seriously.

Israeli Prime Minister Netanyahu, however, had warned against a deal that does not include Iran's ballistic missiles and its proxies. Netanyahu has long described Iran as a key threat to Israel and a source of instability in the region.

Analysts believed that the prime minister may be pushing for a campaign to topple the Iranian regime. Israel is believed to have nuclear weapons, although it neither confirms nor denies this.

Earlier, Trump said on February 19 that Iran must reach a deal within 10 to 15 days, warning that "really bad things" would otherwise happen.

Oil prices edged higher as investors assessed whether the talks could avert a military conflict that risks supply disruptions, though higher US crude inventories capped gains.

Araghchi said that Iran aimed to achieve a fair, swift deal but reiterated that it would not forgo its right to peaceful nuclear technology. Washington views nuclear enrichment inside Iran as a potential pathway to nuclear weapons. "A deal is within reach, but only if diplomacy is given priority," Araghchi said in a statement on X.²⁶

On February 22, Arachis said he believed there was still a good chance for "a diplomatic solution based on a win-win game". He said there was no need for a military buildup, adding that it could not pressure the Iranian regime. Iran has always denied seeking the atom bomb. Arachis was the point man for the unsuccessful efforts to resurrect the 2015 deal during US President Biden's 2021-25 administration, until he was replaced with a hardliner. Arachis is a serious professional.²⁷

Meanwhile, President Trump was getting impatient with the ongoing negotiations with Iran. He had expressed frustration with negotiators' failure to reach a deal. "They want to make a deal, but we haven't heard those secret words 'We will never have a nuclear weapon'," Trump said in his State of the Union speech on February 24.

Much earlier, in June 2025, the US had joined Israel in striking Iranian nuclear sites. Iran had threatened fierce retaliation if attacked again.

Earlier, the USS Abraham Lincoln and several guided-missile destroyers entered the Middle East. As of February 26, the US military prepared for the possibility of President Trump authorizing military action, the US has assembled its largest concentration of air power in the Middle East since the 2003 invasion of Iraq. The USS Gerald Ford, the US Navy's most advanced aircraft carrier, was expected to arrive within days. The carrier would become the second aircraft carrier in the region. Its arrival would add to the dozens of advanced F-35 and F-22 fighter jets, bombers, and refueling planes already deployed. The buildup would give Trump the choice of sustaining an extended air campaign against Iran, rather than conducting a limited strike like last summer's operation, when B-2 bombers flew from the US to hit a small number of enrichment sites at Fordow, Isfahan, and Natanz.

Notwithstanding the largest US military deployment in the Middle East, there was still a glimmer of hope that a nuclear deal between the US and Iran could now be achieved. The Trump administration did not want to go to war with Iran. But Israel pressured the US to strike Iran.

On February 26, another round of indirect talks between Iranian and US officials ended with a mediator claiming "significant progress" but still no unmistakable evidence that either side was willing to concede enough on their positions to avoid war.

After the conclusion of the talks in Geneva on February 26, Iranian Foreign Minister Araghchi said that further technical talks would be held next week in Vienna and that progress had been "good".

"These were the most serious and longest talks," Araghchi said.²⁸

The two sides had been at odds over key issues, including uranium enrichment and missiles. The Trump administration had repeatedly emphasized, in lockstep with Israel, that it will not accept any nuclear enrichment taking place on Iranian soil, even at civilian-use levels agreed during the

2015 nuclear deal that Iran agreed with world powers. Trump unilaterally abandoned that deal in 2018.

In the days leading up to the Geneva talks, US officials increasingly focused on Iran's ballistic missile program, saying the missiles threaten US military bases across the Middle East as well as Israel. Iran has refused to entertain any talks on its conventional weapons. Iranian officials, including President Masoud Pezeshkian, have repeatedly said they will never develop nuclear weapons.

Iranian officials had not publicly discussed all the details of their proposals. Still, they are believed to include diluting part of the country's 60-percent enriched uranium and keeping the uranium inside the country. Iranian authorities envisage that it could be paired with economic opportunities for the US related to Iranian oil and gas and the purchase of airplanes.

Supreme Leader Khamenei had kept his tough rhetoric against the US as well, casting doubt on the chances of any agreement. He also said Trump would be unable to overthrow Iran's government after the US president said regime change would be "the best thing that could happen" in Iran.

In a remarkable set of statements, Araghchi said during an interview that even if Khamenei is killed, the theocratic establishment in Iran would continue because it has legal procedures in place to appoint a successor. Pezeshkian added, "They can cut me, cut anyone. If they hit us, a hundred more like us will come up to run the country."

Meanwhile, Iran's economic situation was worsening by the day. Rising inflation had gripped the country for more than a decade because of a mix of chronic local mismanagement and US and UN sanctions. According to separate reports by the Statistical Centre of Iran and the Central Bank of Iran, inflation has now shot beyond 60 percent. Food inflation was by far the strongest driver at a whopping 105 percent. That included a 207-percent inflation rate for cooking oil, 117 percent for red meat, 108 percent for eggs and dairy products, 113 percent for fruit, and 142 percent for bread and corn. Iran's national currency, the rial, stood at about 1.66 million rials to the US dollar on February 26, near an all-time low.²⁹

President Pezeshkian said on February 26 that Khamenei had banned weapons of mass destruction, which "clearly means Tehran won't develop nuclear weapons," reiterating a religious decree issued in the early 2000s.³⁰

In hindsight, the negotiations were scuttled by the Trump administration, which had then secretly decided with Israel on a plan to wage war on Iran.

In a shocking development, the US-Israeli war of choice on Iran began on February 28 with massive U.S. and Israeli bombardments of Iran.

Spectacularly, the US-Israeli military had joined Israel and attacked more than 1,000 targets in Iran and killed many of its top officials, including Supreme Leader Ayatollah Ali Khamenei.

On March 4, President Trump told lawmakers it is not yet possible to know the "full scope and duration" of US strikes on Iran. In a letter letting Congress know of the military action, Trump said the

threat from Iran had been "untenable" despite efforts to find a diplomatic solution. But lawmakers said they were unclear of Trump's plans after receiving a classified briefing from top officials about the strikes, on the eve of a vote on a war powers resolution that could limit the president's actions.

The US and Israel began striking Iran, and Iran responded by firing missiles and drones at Israel and Gulf states allied to the US.

In the letter, Trump told Senate President Pro Tempore Grassley that Iran "remains one of the largest, if not the largest, state-sponsors of terrorism in the world".

He said it "continues to seek the means to possess and employ nuclear weapons." "It's array of ballistic, cruise, anti-ship, and other missiles pose a direct threat to and is attacking US forces, commercial vessels, and civilians, as well as those of our allies and partners," the letter added. The president said no US ground forces had been committed to the operation.³¹

Democratic lawmakers and some Republicans questioned whether Trump exceeded his powers by launching strikes without congressional approval. Many have supported efforts to limit Trump's ability to take further action in Iran. Trump has previously conducted military operations without congressional approval, such as the US strikes against Iranian nuclear facilities last year, and the operation to seize Venezuela's President Nicolás Maduro in January.

Undoubtedly, President Trump's actions were unconstitutional, and most Americans were against them.

Meanwhile, the US-Israeli alliance intensified strikes on Iran as markets plunged across Asia. The US and Israel pressed on with their round-the-clock assaults on Iran in a campaign that the top US commander said was "ahead of the game plan". Meanwhile, the death toll from US-Israeli attacks on Iran rose to 1,045.³²

The oil shock was felt as the benchmark Brent crude was at \$83.76 a barrel on March 4, as Iran attacked ships and energy facilities, closing navigation through the Strait of Hormuz, which connects the Persian Gulf and the Gulf of Oman, the world's most important energy trade route, and conduit for a fifth of the world's oil.³³

The Strait of Hormuz has great strategic significance and has appeared as a choke point. It is bounded to the north by Iran and to the south by Oman and the UAE. The corridor is about 33km wide at its narrowest point. In 2025, about twenty million barrels of oil passed through the Strait of Hormuz per day, which is \$600bn worth of energy trade per year. The oil comes not only from Iran, but also from other Gulf states such as Iraq, Kuwait, Qatar, Saudi Arabia, and the UAE.³⁴ About 3,000 or so ships usually sail through the strait each month. Meanwhile, the Strait of Hormuz was closed because no one dared to go through it, fearing being attacked. Scores of ships had halted in the Gulf. Qatar, one of the world's main LNG producers, has shut production. Iraq has scaled back oil output.

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states such as Iraq, Kuwait, Qatar, Saudi Arabia, and the UAE.³⁵ About 3,000 or so ships usually sail through the strait each month.

The Strait was now under the "full control" of Iran's navy, the IRGC said, warning vessels not to transit the waterway. Trump said the US Navy could begin escorting oil tankers through the Strait if necessary. But shipowners and analysts are uncertain whether that would be enough to stop rising prices or whether the US can spare vessels to do so without exposing them to potential attacks. If oil and gas coming from the Strait are cut off, that will have significant ramifications for the oil market. Oil prices had soared back above \$100 a barrel, having come down earlier when Trump said the war would be over soon. Iran said it will not let oil through the Strait of Hormuz until US and Israeli attacks cease.³⁶

Trump risks political fallout if higher energy prices persist, as his Republican Party tries to keep power in the congressional midterm elections in November.

Meanwhile, Mokhiber, a senior aide to the late Supreme Leader Khamenei, said that Iran has no intention of negotiating with the US and can continue the Middle East war for as long as needed. He said that Iran had "no trust in the Americans, and we have no basis for any negotiations with them", adding that: "We can continue the war as long as we want."

Iran's security chief Larijani, who was also an adviser to Khamenei, said in a post on X on March 2 that Tehran will not negotiate with the US, in response to a report that Iran is trying to revive negotiations with Washington.

Meanwhile, Iran expanded a retaliatory missile and drone barrage on the fifth day of the war that sent stocks sinking. The war took a growing toll on Lebanon, where Iran-backed militant group Hezbollah has launched drones and rockets at Israel in retaliation for the killing of Iran's supreme leader in the US-Israeli opening strikes. On March 4, the Israeli military called on residents to leave sixteen towns and villages in southern Lebanon, in an "urgent warning" before using force against Hezbollah militants. Israeli attacks killed four in Baalbek in Lebanon. In a throwback to earlier wars, Israel said it was moving troops across the border to create a buffer zone inside Lebanon.

With global energy prices already on the rise over the expanding war, the IRGC declared it has "complete control" of the Strait of Hormuz.

But Trump said the US had "knocked out" Iran's navy, along with its air force and radar systems, and that the US Navy was ready to escort tankers through the Strait of Hormuz.

Israel's military said it launched a "broad wave of strikes across Iran, which had also launched three separate missile barrages at Israel."³⁷

On March 4, Israel said it had launched its latest round of attacks on Tehran, with the country's defense minister vowing to "crush" the Iranian regime's capabilities.

Meanwhile, air travel across the Middle East remained severely disrupted, with Qatar Airways, Emirates, and Etihad. Spanish Prime Minister Pedro Sanchez described the ongoing US and Israeli strikes against Iran as a "disaster."³⁸

The IRGC said that it has fired 230 drones at several facilities hosting US troops in the Middle East, including a base in Erbil in northern Iraq and the Ali Al Salem Air Base and Camp Arijana in Kuwait. It said the attacks were among its “first powerful steps” in the war, despite Iran having attacked Gulf Arab states for days since Israel and the United States launched their coordinated offensive on Saturday.

Two drones also targeted a US military base and a hotel in Erbil, in the Kurdish region of northern Iraq. A projectile hit Saudi Arabia’s Ras Tanura refinery, the biggest domestic oil refinery run by Saudi Aramco. Saudi Arabia had shut down operations at the plant several days ago after a fire broke out that was caused by debris from the interception of two Iranian drones. Strikes were also reported in the UAE at the US consulate in Dubai and at a port in the city of Fujairah. The UAE downed three ballistic missiles and 121 drones, while eight drones landed inside the country. The US embassy in Saudi Arabia and the US consulate in the UAE came under drone attacks, and the US authorized nonemergency government personnel to evacuate. Qatar intercepted ten drones and two cruise missiles launched from Iran. Qatar Airways said its flight operations remained “temporarily suspended due to the closure of Qatari airspace.” By now, Iran had begun hitting targets in Israel as well as US military assets in the Gulf states.³⁹

The war was by now already more extensive, leading to damage in Iran, Israel, and throughout the Middle East. The Trump administration does not have a war strategy, and its bizarre explanation of why the US attacked Iran bordered on the ridiculous.

Aaron Blake, in his excellent article “The rationale for striking Iran was already a mess. Trump just made it worse,” published in CNN on March 4, covers it brilliantly and argues that:⁴⁰

The Trump administration’s stated justifications for going to war with Iran were already a jumbled and self-contradictory mess. But on Tuesday, Trump made it even worse — laying waste to the administration’s confusing explanation from Monday. Just a day after Secretary of State Marco Rubio claimed that Iran posed an imminent threat — because it would respond to imminent attacks from Israel by striking US forces — Trump went with an entirely different explanation: that Iran was going to launch preemptive strikes against the US on its own. “It was my opinion that they were going to attack first,” the president said. And with that, the botched rollout of the Trump administration’s case for war enters yet another chapter. Rubio had already turned plenty of heads with his claims on Monday. “We knew that there was going to be an Israeli action,” Rubio said. “We knew that that would precipitate an attack against American forces, and we knew that if we did not preemptively go after them before they launched those attacks, we would suffer higher casualties. This was problematic for a couple of reasons. For one, it was different from the explanations for why Iran posed an imminent threat that had been offered in the days before the war began. Trump special envoy Steve Witkoff, who was leading negotiations with Tehran, initially claimed Iran was “probably a week away” from having nuclear bomb-making material. Then, Trump, in his State of the Union address last week, claimed Iran would “soon” be able to strike the United States with an intercontinental ballistic missile (ICBM). But those claims didn’t square with either US intelligence or with the administration’s past claims about having “obliterated” Iran’s nuclear program just eight months ago. Additionally, Rubio’s explanation made it sound a little like Israel was the tail wagging the dog — the idea that the US was having its decisions about going to war dictated by an ally. The

Trump administration on Tuesday set about trying to dispel that notion, saying Rubio's explanation was not about why the US went to war, period, but why the US went to war when it did. But Trump has now taken exception to that narrative, scrambling his administration's messaging yet again. When asked on Tuesday whether Israel had forced his hand, he claimed it was Iran that was about to strike. "It was my opinion that they were going to attack first," Trump said of Iran. "They were going to attack if we did not do it. They were going to attack first. I felt strongly about that." He added, "And based on the way the negotiation was going, they were going to attack first, and I did not want that to happen. So, if anything, I might have forced Israel's hand." Trump then seemed to point to disagreements within his administration on the subject. "We thought, and I thought maybe more so than most — I could ask Marco — but I thought we were going to have a situation where we were going to be attacked," Trump said. "They were getting ready to attack Israel. They were getting ready to attack others. You see that right now. ... So, I was right about that." Secretary of Defense Pete Hegseth chimed in shortly after on social media, saying Trump's explanation was "100% correct." And after Trump's remarks, Rubio on Tuesday afternoon denied that he had attributed any part of the rationale to following Israel. He instead lined up behind the president's latest explanation. "The bottom line is this: The president determined we were not going to get hit first. It is that simple, guys. We are not going to put American troops in harm's way," Rubio told reporters on Capitol Hill. It is difficult to overstate just how much this contradicts Rubio's version of events and opens a new complex issue. The idea that Iran was about to strike against the US would be the easiest and cleanest justification, if it were substantiated. But that is notably not the justification that Rubio — or anybody else — offered, at least not before Tuesday. Rubio instead pitched a much more complicated, bank-shot theory in which Israel's imminent action, by extension, made Iranian attacks against the US imminent as well. It is debatable whether that was sufficient justification, but at least it was logically plausible. But it also risked solidifying a narrative that was very un-Trump — one in which he was not the top dog but was instead being led or even coerced into war by Israel. That was already a narrative that had raised concerns in certain circles. (See: Megyn Kelly's show on Monday.) And we have already seen Trump try to claim credit for killing Iran's Supreme Leader Ayatollah Ali Khamenei, even as his administration has looked to emphasize that Israel undertook part of the mission. So, while it is not exactly a surprise that Trump would overcorrect, he has created a whole new set of problems. The question now will be what intelligence backs up Trump's assertion. If it does not exist, it raises the prospect that the US will go to war with Trump's premonition. And the administration is now on at least its fourth different explanation for why Iran posed an imminent threat in less than 10 days, including the two most recent versions that directly contradict one another. Trump is no stranger to throwing things at the wall and seeing what sticks. But it's something else entirely to be doing that with a subject as serious as the justification for war — especially when US service members have died.

Undoubtedly, the Trump administration's justifications for attacking Iran are ludicrous. He does not have a rationale or even a coherent strategy for conducting the war with Iran. As expected, Democratic lawmakers had slammed him, warning the US may be heading for a ground assault and an open-ended engagement with no end in sight.

By March 4, Iran had clearly shown that it had no intention of negotiating with the US and could continue the war for as long as needed. Mokhber, a senior aide to the late Supreme Leader Ali Khamenei, said that Iran had "no trust in the Americans, and we have no basis for any negotiations with them", adding that: "We can continue the war as long as we want."

Iran's security chief Larijani, who was also an adviser to the country's former Supreme Leader Ali Khamenei, said in a post on X that Tehran will not negotiate with the US, in response to a report that Iran is trying to revive negotiations with Washington.⁴¹

The IRGC said Iranian forces had "complete control" of the Strait of Hormuz, and any vessels looking to pass risked damage from missiles or stray drones. Trump said on March 3 that the US Navy was ready to escort oil tankers through the crucial Gulf shipping route.

The IRGC said they had also launched more than forty missiles at US and Israeli targets in a new wave of strikes.

On March 5, it said they had sealed off the Strait of Hormuz. Meanwhile, several governments scrambled to evacuate citizens stranded in the Middle East, where Iran expanded a retaliatory missile and drone barrage that had also sent stocks sinking.

The war was now taking a growing toll on Lebanon, where Iran-backed militant group Hezbollah has launched drones and rockets at Israel in retaliation for the killing of Iran's supreme leader, Khamenei.

On March 4, the Israeli military called on residents to leave sixteen towns and villages in southern Lebanon, in an "urgent warning" before using force against Hezbollah militants. Israeli strikes have killed at least fifty-two people in Lebanon, while the UN said that more than 30,000 people were displaced. Israel said it was moving troops across the border to create a buffer zone inside Lebanon.⁴²

The IRGC leadership said it has "complete control" of the Strait of Hormuz, the crucial choke point into the Gulf. But Trump said the US had "knocked out" Iran's navy, along with its air force and radar systems, and that the US Navy was ready to escort tankers through the waterway. Trump was not making sense as he boasted that "just about everything's been knocked out" in Iran, including its navy, air force, and air defense, and said the attacks had killed even leaders who could have taken over. "Most of the people we had in mind are dead," Trump said. "Now we have another group. They may also be dead, based on reports."

A strike on a school in the city of Minab on the first day of the war killed more than 150 people. The US military lost six troops; in Israel, nine people had been killed. At least eight people had died across the Gulf.

Meanwhile, the US and Israel had received lukewarm support, with Western nations limiting involvement to helping Gulf states and repatriating citizens. Canadian Prime Minister Carney, who had backed the strikes, said March 5, that it was time for "rapid de-escalation".⁴³

Iran's expanding missile and drone campaign across the Gulf caused concern. Qatar warned on March 4 that "all red lines have already been crossed" as Iran's retaliation against US-Israeli strikes begins spilling across the region. Iranian attacks had disrupted airports, ports, and commercial activity.⁴⁴

Iran's strategy appeared aimed at raising the cost of the war for Arab states in the hope that they would pressure the US to halt the conflict. So far, Gulf governments have focused on defending their territory and have not allowed US forces to use their airspace or bases to launch attacks on Iran. However, the stance could shift if attacks intensify.

The attacks have also heightened concerns about the safety of the Gulf's energy infrastructure, which supplies a large share of the world's oil and liquefied natural gas.

Qatar is one of the world's biggest LNG exporters, and any disruption to its production or shipping routes could quickly ripple through global energy markets. If the conflict begins to threaten energy facilities or shipping lanes near the Strait of Hormuz, it could trigger sharp spikes in oil and gas prices and further destabilize global trade.⁴⁵

By now, and as expected, the first issue that is now being extensively debated is whether the US attack on the war was legal. Critics say that the US attacks have exceeded the president's authority and do not follow international law. President Trump has provided varying aims and justifications. He has said he felt Iran was going to strike first and the attack was meant to eliminate imminent threats to the US, its military bases overseas, and allies, although he did not provide details, and some claims were not backed by US intelligence reports. Trump also said Iran could obtain a nuclear weapon within one month, but he did not provide evidence, and this contradicted his claims in June that the US military had "obliterated" Iran's nuclear program.⁴⁶

The attacks on Iran are pushing the boundaries of Trump's constitutional authority, according to legal experts. Under the US Constitution, the president commands the armed forces and directs foreign relations, but only Congress has the power to declare war.

Presidents of both parties have conducted military strikes without congressional approval when it was in the national interest, but less intense in duration and scope than what would be considered a war. It is a limit that President Trump may now be testing.

Trump and Defense Secretary Hegseth have both described the action as a war, and Hegseth called it "the most lethal, most complex and most-precision aerial operation in history." Trump said it could last five weeks or more and cautioned that there would be more US casualties.⁴⁷

Congress has provided authorization for large military operations, such as President George Bush's invasions of Afghanistan in 2001 and Iraq in 2003. The War Powers Resolution (WPR) of 1973 functioned as a check on presidential power.

Under the WPR, the president can only involve the military in an armed conflict when Congress has declared war or provided specific authority, or in response to an attack on US territory or its military. It required the president to report regularly to Congress, which the administration

started to do on March 2. The WPR also required unauthorized military actions to be ended within 60 days unless the deadline is extended.

It provided a procedure for Congress to withdraw the military from a conflict, and members of both parties had said they planned to put such legislation to a vote soon. It was highly unlikely such a vote would muster a two-thirds majority needed to override a Trump veto, but some lawmakers said it would put members on the record in an election year. Legal experts said popular opposition might be the main check on Trump's ability to continue the attacks.⁴⁸

Legal experts said many countries will consider the attacks unjustified under the UN Charter, which requires member states to refrain from using force or the threat of force against other states. There were exceptions when force was authorized by the UN Security Council or used in self-defense in response to armed attack; neither applies.

There was also the concept of pre-emptive self-defense, which would allow the US to attack Iran if it had proof of an imminent, overwhelming attack.⁴⁹

Undoubtedly, the Trump administration had not met the strict conditions of legal and constitutional requirements. Therefore, the Iranian attacks could clearly be considered illegal under the US Constitution and international law.

The Republicans were only playing politics with their support of the new war. The American attacks on Iran were unconstitutional and unwarranted.

Meanwhile, Netanyahu had delivered on a career-long ambition to overthrow the Iranian regime, but his collaboration with Trump faces a test as their joint military campaign threatens to drag on, with its goals potentially shifting in the coming weeks.

At the outset of the bombing campaign on February 28, both Trump and Netanyahu said regime change was the goal. But in remarks on March 2, Trump did not mention overthrowing Iran's government as his top priority. He now said the US goal was to destroy Iran's missiles and navy, and to stop it from obtaining a nuclear weapon. Hegseth also said at a press conference on March 2 that the operation was not a "so-called regime-change war."

Netanyahu, by contrast, had called on Iran's citizens to take to the streets and overthrow their rulers on March 2. "We're going to create the conditions, first, for the Iranian people to get control of their destiny," he said. Regime change is one of the aims of Israel.⁵⁰

Israel and the US now had different war goals. Trump and Netanyahu had urged Iranians to rise, but Trump said regime change was not the goal.

Earlier, in the build-up to war, Netanyahu had successfully convinced Trump that it was a "now-or-never moment" to prevent Iran from buying nuclear weapons and destroy its ballistic missile

capabilities. Later, Trump said the operation could take “four or five weeks” or “whatever it takes.” Trump faces domestic pressures that could affect his thinking as the war drags on and expands.

The operation was unpopular in the US, with only one in four Americans saying they backed American strikes on Iran, according to Reuters/Ipsos polling. With the crisis disrupting shipping and energy production, rising gas prices could become a daily reminder of the affordability crisis facing many Americans. Gas is up 11 cents per gallon in the US, with much larger spikes in global markets suggesting further increases for American consumers.⁵¹

Notwithstanding the claims of the Trump administration, it desired regime change. Though arguably exceedingly difficult to execute, the US-Israel regime change operation was being planned. Benoit Faucon, Margherita Stancati, and Dov Lieber, in their article “Israel Is Blowing Up Iran’s Police State to Clear the Way for a Revolt,” published in *The Wall Street Journal*, March 4, 2026, argued that:⁵²

Israel’s military was targeting the Iranian police state that brutally suppressed protests and killed thousands of people, with the hope of clearing the way for a popular revolt to overthrow the Islamic government. However, analysts were skeptical that the strategy would work.

The US was then planning to use Kurdish forces in Iraq as part of a ground operation. The Kurdish people, an ethnic minority group numbering 25-30 million across Türkiye, Iraq, Iran, Syria, and Armenia, have long worked with the CIA and the US, particularly in the fight against ISIS. However, there is a history of frustration among Kurdish forces, who feel abandoned by the US, especially after the Trump administration decided to withdraw forces from Syria in 2018. This has led to concerns that the US might once again pull support, adding to the narrative of the Kurds being left to face repercussions alone.

Kurdish leadership had held talks about cooperation against Iranian security forces. Some Kurdish militias based along the Iran-Iraq border had expressed interest in using the current instability following international strikes against Iran’s leadership, with discussions touching on the provision of weapons and intelligence support from US agencies, including the CIA.

Top White House officials had been in active discussions with Kurdish leaders in Iraq about providing them with military support to strike the regime. Iranian Kurdish militants have thousands of soldiers along the Iraq-Iran border with major support in Northern Iraq's Kurdistan region.⁵³

Several Iranian opposition Kurdish groups are based in Iraq's semi-autonomous Kurdish region and have been waging a low-level insurgency against Tehran for years. Some have demanded autonomy within Iran, while others are fighting for secession from the country.

The Trump administration was then considering arming Iranian Kurdish opposition groups based in neighboring Iraq, according to reports, in a move that could open a new front in the war on Iran and risk igniting a civil war in Iran.

The possibility of the US supplying weapons to Iranian Kurdish groups and supporting potential cross-border ground attacks in the western part of the country came as the US and Israel wage a massive aerial bombardment of Iran. The US aim would be to stretch Tehran's military resources, weaken the state's grip on power, and foment an uprising inside Iran, a multiethnic country of some 93 million people.

President Trump, on March 3, spoke with the president of the Democratic Party of Iranian Kurdistan (KDPI), Mustafa Hijri. The KDPI was one of the groups targeted by the IRGC.

However, Iran's clerical rulers, despite the killing of Khamenei and senior military leaders, have not capitulated or fragmented and have kept control of their country. The main goal was to make sure Iran starts losing control of some areas. Thereby, other minorities as well as the broader opposition may be inspired. Iran had long been accused of suppressing and discriminating against the country's ethnic minorities, including Kurds. The IRGC had been striking Kurdish groups and said on March 3 that it targeted Kurdish forces with dozens of drones.

The Kurds in Iran face severe oppression, with Kurdish prisoners in Iranian jails, Kurdish leaders assassinated by the regime, leading to a willingness within the Kurdish community to take the risk of involving themselves with the US in a new battle.

Iranian Kurdish armed groups had thousands of forces running along the Iraq-Iran border, primarily in Iraq's Kurdistan region. Several of the groups have released public statements since the beginning of the war, hinting at imminent action and urging Iranian military forces to defect.

The Kurdish people are an ethnic minority group without an official state. Today, there are an estimated 25-30 million Kurds, the majority living in a region that stretches across parts of Turkey, Iraq, Iran, Syria, and Armenia. Most Kurds are Sunni Muslims, but the Kurdish population has diverse cultural, social, religious, and political traditions as well as a variety of dialects. Kurds make up around 10 percent of Iran's population and primarily live in the country's west along the border with Iraq.

Any ground incursions by Iranian Kurdish groups into western Iran could stretch Tehran's military resources. It would stretch the IRGC forces thin when they are needed elsewhere. However, the risks of the US arming the Iranian opposition Kurdish groups are considerable. The US could trigger a civil war and the fragmentation of the country, which could have lasting consequences.

There were also risks for over half a dozen Iranian Kurdish groups that were based in northern Iraq. Many of these groups were previously armed but had since laid down their weapons. If the Kurds did engage in a long-term war against Iran, and the US support disappeared, this would have proven extremely dangerous for them.

The US recently cut support to the Syrian Democratic Forces (SDF), a Kurdish-led militia that was a key US partner for years in the war against the Islamic State extremist group.

In anticipation of a US attack on Iran, five Iranian opposition Kurdish groups based in Iraqi Kurdistan announced a new political coalition last month aimed at overthrowing the Iranian regime and achieving Kurdish autonomy.⁵⁴

The new coalition includes the Kurdish-inhabited area Freedom Party (PAK), the Democratic Party of Iranian Kurdistan (PDKI), the Kurdistan Free Life Party (PJAK), the Organization of Iranian Kurdistan Struggle (Kabat), and the Komala of the Toilers of Kurdistan. The coalition does not include several Kurdish political heavyweights, such as the Komala Party of the Iranian Kurdish-inhabited area.

Iranian Kurdish opposition forces were expected to take part in a ground operation in Western Iran. Some Kurds had hoped that in exchange for working with US forces, the semi-autonomous Kurdistan region of Iraq would win its independence, though that never came to fruition.⁵⁵

The idea of a Kurdish intervention was later scuttled by Trump, who said it would add further complexity to the war situation.

Meanwhile, Europe had reacted cautiously to the escalating conflict with Iran, as several leaders expressed concern over the widening war and the continent struggled to present a united response.

When the US and Israel launched airstrikes on Iran on February 28, very few European leaders had advance notice. The limited consultation highlights how Europe has found itself on the sidelines of the rapidly escalating Middle East crisis. European Commission President Løyen and EU Council President Costa initially issued a joint statement saying the EU was closely watching developments and market “steadfast commitment to safeguarding regional security and stability.”

But divisions soon appeared among European governments over how to respond. At the same time, EU leaders acknowledged the dramatic implications of the killing of Khamenei during the US-Israeli strikes.⁵⁶

Meanwhile, European governments have struggled to coordinate a unified stance. France, Germany, and the UK issued a joint warning over the weekend that they were prepared to take “defensive action” if Iran continued missile and drone attacks, but stopped short of endorsing the strikes themselves.

The UK initially refused the US permission to use British bases for the strikes before reversing course and allowing them to be used for “defensive” operations targeting Iranian missile sites. Even then, tensions appeared between the UK and the US. Trump criticized British Prime Minister Starmer, saying that he was “very disappointed” and that it “took far too long” for the

US to receive permission to use the bases. He also said that the relationship between the two countries was “not what it was.”

Across the continent, European governments were also grappling with the potential domestic consequences of the conflict. Energy prices had already surged, with European gas prices rising sharply amid fears of disruption to Middle Eastern supplies.⁵⁷

Meanwhile, the US-Iran conflict intensified after a series of US and Israeli military operations that targeted Iran’s leadership and military infrastructure, prompting widespread Iranian missile and drone retaliation across the region. Tehran has also attacked US and allied bases in the region. As expected, the war had expanded and had now engulfed the entire region.

The Iranian regime had been weakened by relentless US-Israeli strikes but was still wholly intact. Only a ground invasion could have removed it. But that was never even considered for obvious reasons.

On March 14, the US launched a major airstrike on Iranian military installations on Kharg Island, with President Trump claiming that American forces “totally obliterated” key targets during what he described as one of the most powerful bombing raids ever conducted in the Middle East. The strike came amid escalating hostilities between the US, Israel, and Iran following a series of military confrontations across the Middle East. Trump again declared that.

“Iran will never have a nuclear weapon, nor will it have the ability to threaten the United States, the Middle East, or the world.”

The attack on Kharg Island could intensify regional tensions and raise concerns over potential disruptions to oil supplies and maritime security in the Gulf. The Kharg Island, found around nineteen miles off the Iranian mainland, manages 90 percent of Iran’s crude exports. The war has now sparked chaos in global markets and sent oil prices soaring.⁵⁸

On March 14, Trump threatened to strike the oil infrastructure of Iran's Kharg Island hub unless Tehran stopped attacking vessels in the Strait of Hormuz, a warning that could further roil markets coping with a historic supply disruption. The export terminal lies about three hundred miles northwest of the strait.

President Trump said that:⁵⁹

Iran could not defend against U.S. attacks. "Iran’s Military, and all others involved with this Terrorist Regime, would be wise to lay down their arms, and save what’s left of their country, which isn’t much! The Fake News Media hates to report how well the United States Military has done against Iran, which is totally defeated and wants a deal - But not a deal that I would accept.”

Iran, however, showed no sign of capitulating or bowing to U.S.-Israeli military pressure. Iran's armed forces threatened on March 14 to destroy US-linked oil infrastructure after Trump's statements.

Markets had been watching for any sign that US strikes had damaged the island's intricate network of pipelines, terminals, and storage tanks. Even minor disruptions could have further tightened global supply, adding pressure to a volatile market. Oil prices had swung sharply on Trump's changing comments about the duration of the war.

The U.S. embassy in the Iraqi capital, Baghdad, was hit in a missile attack on March 14. In other attacks across the region, the IRGC said it had conducted more attacks on Israel with Lebanon's Hezbollah militia.⁶⁰

On March 13, Hegseth said that Iran's new Supreme Leader, Mojtaba Khamenei, was wounded and disfigured, questioning Khamenei's ability to govern after US and Israeli attacks on Iran. No images have been released of Khamenei since an Israeli strike at the start of the war that killed much of his family, including his father and wife. His first comments came in a statement read by a television presenter on March 12. In the statement, he vowed to keep the Strait of Hormuz shut and called on neighboring countries to close US bases on their territory or risk Iran targeting them.⁶¹

The war was having a negative impact on the economy. Energy prices had soared since the start of the war, with huge swings coming close to \$120 on March 9 before falling back. They stayed well above levels before the conflict. The cost of hiring a supertanker to ship oil from the Middle East to China had almost doubled from last week's price to a record high of more than \$400,000.

The almost complete closure of the vital shipping lane had also hurt Gulf countries, like Saudi Arabia, whose economies rely heavily on energy exports. Iran, by comparison, exports about 1.7 million barrels per day, and it exported \$67bn worth of oil in the fiscal year ending March 2025, which was the highest oil revenue in the past decade. A blockade of the strait will also hit Asia hard. In 2022, around 82% of crude oil and condensates leaving the Strait of Hormuz were bound for Asian countries. China alone was estimated to buy around 90% of the oil that Iran exports to the global market. Because China uses that oil to make products, it then exports to other countries, and higher oil prices could also mean higher prices for consumers around the world. Iran can close the Strait by laying mines using boats and submarines. The US military has said it has eliminated 16 Iranian mine-laying ships in the Strait.⁶²

The persistent threat of Strait closure has prompted some Gulf countries to develop alternative export routes. Saudi Arabia runs a 1,200km-long pipeline capable of transporting up to five million barrels of crude oil per day. The UAE has connected its inland oilfields to the port of Fujairah on the Gulf of Oman via a pipeline with a daily capacity of at least 1.5 million barrels. However, that would lead to a drop in supply of between 8 and 10 million barrels per day.⁶³

Saudi Arabia was now using the pipeline. But the UAE link was not functional as the port of Fujairah had been hit by Iran.

Earlier, on March 12, two tankers were ablaze in an Iraqi port after being hit by suspected Iranian explosive-laden boats, a step-up in attacks that have cut off oil from the Middle East. The attacks were a clear sign of defiance of Trump, who said on March 11 that the US had already won the war. On March 12, three other ships were struck in the Gulf. IRGC claimed responsibility for at least one of those attacks, on a Thai bulk carrier that was set ablaze, which the IRGC said had disobeyed their orders. Another container vessel reported being struck near the UAE on March 12, 2026.⁶⁴

On March 14, the International Energy Agency (IEA) said the closure of the Strait of Hormuz has triggered the largest disruption to global oil markets in history, with supply expected to fall by about eight million barrels per day in March, or around 8%. The agency's member countries responded by agreeing to release a record 400 million barrels from strategic stockpiles to stabilize oil prices and compensate for the loss of Middle East output.⁶⁵

Earlier, undermining U.S. and Israeli claims to have knocked out much of Iran's stock of long-range weapons, more drones were reported on March 12 flying into Kuwait, Iraq, the UAE, Bahrain, and Oman. Lebanon's Iran-backed militia Hezbollah fired its biggest volley of rockets into Israel during the war, prompting fresh Israeli strikes on Beirut. Trump repeatedly tried to calm energy markets by saying the surge in oil prices would be short-lived. On March 12, Trump said the US profited from higher oil prices, but that his priority was stopping Iran from obtaining a nuclear weapon. The US is a net oil exporter but is also the world's biggest oil consumer. Sustained soaring prices would cause broad inflation.⁶⁶

The war was spreading to the seas, with oil tankers hit by Iranian attacks, an Omani port set ablaze, and multiple vessels hit by projectiles near the Strait of Hormuz. The growing conflict is deepening fears about the impact on the global economy.⁶⁷

Meanwhile, several Asian countries are taking drastic action to reduce their oil consumption. Universities in Bangladesh have closed to save energy. Austerity measures in Pakistan have shuttered schools and shifted services online. Vietnam is calling on companies to encourage remote working, while Thailand has ordered government workers to work from home.⁶⁸

Trump also said the US was going to be hitting Iran "very hard over the next week", shortly after issuing a partial 30-day waiver for purchases of sanctioned Russian oil, hoping to ease prices fueled by the U.S.-Israeli war on Iran.

Trump's comments on the likely duration of the war had affected prices, which had prompted Iran to attack vessels in the Strait of Hormuz. Trump had previously said the war was "complete" and promised to guarantee the safety of vessels in the strait. On March 13, Trump

said the US could escort shipping there "if we needed to. Benchmark Brent crude eased about 0.6% to around \$99.80, still up almost 40% since the start of the conflict.⁶⁹

Meanwhile, Iran fired more missiles and drones at Israel, and Iranian drones were reported flying into Kuwait, Iraq, the UAE, Bahrain, and Oman. The Israeli military launched strikes across Tehran. It said its air force had struck more than two hundred targets in western and central Iran over the past day, including ballistic missile launchers, air defense systems, and weapons production sites.⁷⁰

The US had conducted strikes against more than 6,000 targets in Iran. As many as 150 US troops have been wounded in the US-Israeli war on Iran. As of March 13, the war had killed more than 2,000 people, including almost seven hundred in Lebanon.⁷¹

Meanwhile, Trump said on March 13 that he will know when the war is over when he feels it "in my bones," offering yet another personal measure for when the conflict might end.⁷²

The war was getting exorbitantly expensive. In the first six days of the war, Iran had cost the US at least \$11.3 billion. It is expected that the White House will soon make a request to Congress for more funding for the war. Some officials have said the request could be for \$50 billion. The Trump administration had not provided a public assessment of the cost of the conflict or a clear idea of its expected duration. Trump said on March 11 that "we won" the war, but that the US will stay in the fight to finish the job. The war has thrown global energy markets and transport into chaos.

Trump administration officials had also told lawmakers that \$5.6 billion of munitions were used during the first two days of strikes. Members of the US Congress expressed concern that the conflict will deplete US military stocks at a time when the defense industry is already struggling to keep up with demand. Democratic lawmakers demanded public testimony under oath from administration officials about the Republican president's plans for the war, including how long it might last and what his plans are for Iran once the fighting has stopped.⁷³ And in a rare show of GOP criticism, Republican Sen. Murkowski slammed Trump's handling of the war, demanding public hearings and saying that mixed messaging from the administration is leading to confusion.

Meanwhile, Iranian President Pezeshkian and other Iranian officials said that the US must recognize Iran's legitimate rights, pay reparations, and provide firm international guarantees against future aggression. The gist of the statements coming from Tehran is that, under the current circumstances, Iran will not negotiate, offer a ceasefire, or engage in diplomacy with the US while it continues to face air attacks from it and Israel.⁷⁴

At the same time, Iran's ambassador to the UN wrote to the secretary-general earlier this week calling on the international community, and the UN Security Council in particular, to urge the US and Israel to halt their attacks.

The war has caused the biggest disruption to global energy supplies since the oil shocks of the 1970s.⁷⁵

Oil prices had blasted above \$100 a barrel. Iran said it would not allow oil through the Strait of Hormuz until US and Israeli attacks ceased, and it would not conduct any negotiations with Washington.⁷⁶

On March 12, two tankers were ablaze in Iraqi waters, a clear escalation in Iranian attacks that have cut off Middle East energy supplies, defying Trump's claim to have already won the war he launched two weeks ago.

Iraqi authorities said the vessels had been attacked overnight by Iranian boats laden with explosives. At least one crew member was killed.

Hours earlier, three other ships had been struck in the Gulf. IRC claimed responsibility for at least one of those attacks, on a Thai bulk carrier that was set ablaze, which the IRGC said had disobeyed their orders. Another container vessel reported being struck by an unknown projectile near the UAE.

The war has so far killed around 2,000 people and caused the biggest disruption to global energy supplies since the oil shocks of the 1970s.⁷⁷

The surge in oil prices came despite the announcement the previous day that developed countries would release 400 million barrels of oil from their strategic reserves, half from the United States.

That was by far the biggest ever coordinated intervention in the oil markets. But it would take months to conduct and account for just three weeks of supply from the blockaded strait.

Meanwhile, Trump had repeatedly tried to calm energy markets this week by saying the war would soon be over and the surge in oil prices would be short-lived.

But he had not fully explained how the war would end or presented a plan to reopen the blockaded strait. US and Israeli officials said the aim was to destroy Iran's missile and nuclear programs, but Trump has also demanded Iran's "unconditional surrender" and the power to decide its leaders.

Iran had made clear that its strategy now was to impose a prolonged economic shock on the world to force Trump to back off.

The spokesperson for Iran's military command said on March 11 that the world should prepare for oil prices of \$200 a barrel because of instability caused by the US. That would be well above

the highest oil price in the history of \$147.27 in July 2008, weeks before the start of the global fiscal crisis.

Trump said on March 11 that the huge release of reserves would "substantially reduce oil prices as we end this threat to America and the world".

Iran also hit fuel tanks in Bahrain, and drones struck oil storage facilities at Oman's Salalah port. Saudi Arabia said it had also intercepted several drones heading towards its Shaybah oilfield.⁷⁸

Several ships had come under attack in the Strait of Hormuz. Iran has said it would "set fire" to any ships trying to pass through the Strait, but an exceedingly small amount of traffic has continued.⁷⁹

With political pressure building over soaring oil costs, President Trump had suggested he would end the biggest US military operation since 2003 "soon." But finding an acceptable end to the war could be difficult if Iran's hardline leaders stay firmly entrenched.

The cohesion of Iran's clerical leadership was present despite the killing of Supreme Leader Ayatollah Ali Khamenei on February 28. Since launching their war, the US and Israel have struck a range of Iranian targets, including air defenses, nuclear sites, and members of the senior leadership.

In addition to Khamenei, the strikes had killed dozens of senior officials and some of the highest-ranking commanders in the IRGC, an elite paramilitary force that controlled large parts of the economy.⁸⁰

Still, US intelligence reports showed that the IRGC and the interim leaders who assumed power after Khamenei's death kept control of the country.

Israel had no intention of allowing any remnants of the former government to stay intact. However, it is unclear how the current US-Israeli military campaign would topple the government. It would require a ground offensive that would allow people inside Iran to safely protest in the streets.

President Trump demanded Iran's 'unconditional surrender' on March 6, adding that his country would work 'to bring Iran back from the brink of destruction' once a new leader acceptable to the US is chosen. Hegseth, the US Defense Secretary, said in early March that the US military would continue bombing 'without mercy.'⁸¹

Meanwhile, the Trump administration had not ruled out sending US troops into Iran. Iranian Kurdish militias based in neighboring Iraq consulted with the US about how and whether to attack Iran's security forces in the western part of the country.

Such an incursion could put pressure on Iranian security services there, allowing Iranians to revolt against the government.

Mohtadi, the head of the Komala Party of Iranian Kurdistan, part of a six-party coalition of Iranian Kurdish parties, said on March 11 that the parties are highly organized inside Iran and that "tens of thousands of young people are ready to take up arms" against the government if they receive US support. He further said he had received reports from inside the Iranian Kurdish-inhabited area that IRGC units and other security forces have abandoned bases and barracks out of fear of US and Israeli strikes.⁸²

However, recent US intelligence reports had cast doubt on the ability of the Iranian Kurdish groups to sustain a fight against Iranian security services. The intelligence reports show that the groups lack firepower and numbers. The Iranian Kurdish groups have recently asked the US to provide them with weapons and armored vehicles. Trump said on March 7 that he had ruled out having the Iranian Kurdish groups go into Iran.⁸³

The Kurdish invasion plan was scuttled later by the Trump administration because of its regional dimensions and added complexity.

Meanwhile, the International Energy Agency (IEA), made up of major oil-consuming nations, had agreed on March 11 to release four hundred million barrels of oil into the global market. This would be the largest release of emergency oil stocks in history. Soon after, Trump authorized the US to release 172 million barrels of oil from the Strategic Petroleum Reserve.⁸⁴

Meanwhile, Oman had evacuated all vessels from its key oil export terminal at Mina Al Fahal as a precautionary measure. Iran had earlier stepped up attacks on merchant ships in the Strait of Hormuz, raising the number of ships struck in the region since fighting began to at least sixteen.⁸⁵ Iran appeared to have set ablaze two tankers in Iraqi waters as it stepped up attacks on oil and transport facilities across the Middle East, warning the world should be ready for oil at \$200 a barrel in defiance of Trump's claim that the US had already won the war.

The war had thrown global energy markets and transport into chaos. The conflict has spread across the Middle East and prompted plans for a record release of strategic oil reserves to dampen one of the worst fuel shocks since the 1970s.

Earlier, Trump had made some outlandish statements about the war. He said, "The US had won the war, but did not want to go back every two years. "We don't want to leave early, do we?" he said. "We've got to finish the job."⁸⁶

On March 11, an Iranian military spokesperson said the Strait was "undoubtedly" under Iran's control, and the G7 group of nations (the US, Canada, Japan, Italy, Britain, Germany, and France) had agreed to examine the option of providing escort for ships so they can navigate freely in the Gulf.

Trump told US forces had knocked out 58 Iranian naval ships and that Iran was "pretty much at the end of the line."

He said the US would now "look very strongly" at the Strait of Hormuz, adding: "The straits are in great shape. We have knocked out all their boats. They had some missiles, but not very many."

Trump said earlier that ships "should" transit through the strait, but Iran had deployed about a dozen mines in the channel, further complicating the blockade.

US and Israeli officials had said they aimed to end Iran's ability to project force beyond its borders and destroy its nuclear program.

Trump and other officials had sent mixed messages about whether regime change was another goal after Supreme Leader Ali Khamenei was killed in the first strikes and replaced by his son, Mojtaba Khamenei.

The US also warned that Iran and aligned militias may be planning to target US-owned oil and energy infrastructure in Iraq.

The US military told Iranians to stay clear of ports with Iranian navy facilities, drawing a warning from Iran's military that if the ports were threatened, economic and trade centers in the region would be "legitimate targets."⁸⁷

President Trump welcomed a coordinated release of oil reserves and said the US was working to keep energy supplies flowing as military operations against Iran continue.

Meanwhile, on March 11, in an overwhelming vote, the UN Security Council backed a resolution condemning Iran. A Russian proposal calling for an end to the war that did not assign blame or even name the parties was rejected.⁸⁸

Escalating Iranian attacks and the US government's decision to hold off on military escorts for oil tankers through the Strait of Hormuz were raising the prospect of a prolonged closure that would choke off exports through the world's most important energy-transport route.

On March 11, the IRGCs struck three cargo ships trying to transit the waterway, the only sea route out of the Persian Gulf. It warned that any other vessels trying to move through the strait also would be targeted.⁸⁹

Meanwhile, global oil prices surged back above \$100 a barrel on March 12, 2026, as the widening Middle East conflict stoked supply disruption fears, and despite Efforts by the U.S. and the International Energy Agency to unleash the largest distribution of oil reserves in history, it did not keep oil futures from increasing. Front-month Brent crude oil futures jumped 9% to \$100.29 in Asian trading on March 12, while front-month West Texas Intermediate crude oil futures rose 8.9% to \$94.97 a barrel. Oil prices, which shot up earlier in the week to \$120 a barrel before retreating, jumped almost 10% back above \$100 a barrel in Asian trade amid renewed fears about supply disruption. Wall Street's main share index fell, and stocks in Asia followed suit.

Iran had by now made clear it intends to impose a prolonged economic shock, with the spokesperson for Iran's military command saying in remarks directed at the US: "Get ready for oil to be \$200 a barrel, because the oil price depends on regional security, which you have destabilized."⁹⁰

The IEA recommended releasing four hundred million barrels from global strategic reserves to dampen one of the worst oil shocks since the 1970s, the biggest intervention in history.

Trump said the IEA decision "will substantially reduce oil prices as we end this threat to America and the world."

US Energy Secretary Wright said Trump had authorized the release of 172 million barrels from the US Strategic Petroleum Reserve from next week.

Houthis in Yemen and other Iran-backed groups could shut the Red Sea strait at the southern tip of the Arabian Peninsula. Container ships were struck off the coast of Dubai and Iraq, and Bahrain also announced a new strike targeting its oil facilities.

The US military has turned down requests to escort tankers or other civilian ships through the strait, with defense officials saying it will not do so until the threat of Iranian fire has eased. The head of US Central Command said its focus stays on destroying Iran's missiles and drones.

Oil futures rallied as traders eyed continued trouble in and around the Strait of Hormuz, even as the US Energy Department said it would release 172 million barrels of oil from the country's emergency stockpiles, part of a broader global effort.

Meanwhile, Iraqi officials called for more protection of maritime routes after reporting that two foreign tankers had been hit in Iraqi waters, catching fire and leaking oil. Bahrain said Iran had targeted fuel tanks at one of its facilities.

Israel conducted fresh airstrikes on Hezbollah targets after the Lebanese militia launched dozens of rockets at Israel. Saudi Arabia, Dubai, and Kuwait said they were targeted by drone attacks.⁹¹

Israel also launched a barrage in Beirut aimed at rooting out the Iran-backed group Hezbollah, which has fired into Israel from Lebanon in solidarity with Tehran.

More than 1,300 Iranian civilians had been killed since the US and Israeli airstrikes began on February 28, according to Iran's U.N. ambassador, Iravani. Scores have also been killed in Israeli attacks on Lebanon.

Iranian strikes on Israel have killed at least eleven people, and two Israeli soldiers have died in Lebanon. Washington says seven U.S. soldiers have been killed and around 140 have been wounded.

The death toll continues to rise. The war had at least 486 in Lebanon and 11 in Israel. Iran launched new attacks on Israel and Gulf countries, keeping up pressure on the Middle East. The UAE was hit by nine drones, which killed two people. In Bahrain, an Iranian attack killed one

person and wounded eight others. Saudi Arabia said it destroyed two drones over its oil-rich eastern region, and Kuwait's National Guard said it shot down six drones.⁹²

US Defense Secretary Hegseth said that "today will be yet again our most intense day of strikes inside Iran." The US Joint Chiefs chair said Iran's missile attacks have fallen 90%.

Trump sent contradictory messages, telling Republican lawmakers the war was likely to be a "short excursion," but threatening in a social media post hours later that the US would dramatically increase attacks if Iran tried to close the Strait of Hormuz. Iran had been targeting energy infrastructure and traffic through the strait, which is a vital waterway for traded oil.

Meanwhile, the US stock market steadied early after Trump's comments fueled wild swings on hopes for a quick end to the war. Oil prices briefly shot to their highest level since 2022 after Iran selected Ayatollah Mojtaba Khamenei to succeed his late father as Iran's supreme leader.

Meanwhile, the ongoing Middle Eastern conflict raged on.

Earlier, the US and Israel continued to strike Iran. On March 10, the US said it was striking Iranian ships capable of mining the Strait of Hormuz, which has been effectively closed by Iranian threats.

Meanwhile, Israel had also launched new waves of strikes both in Beirut and Tehran, where residents hunkered down after being smothered by black rain from Israeli bombing of fuel depots. In response, Iran had continued to unleash strikes around the region, with the government saying that it conducted its own "most intense and heaviest" salvo.⁹³

The IRGC released a list on March 11 of offices and infrastructure run by top US companies with Israeli links whose technology has been used for military applications, describing them as "Iran's new targets". These companies include Google, Microsoft, Palantir, IBM, Nvidia, and Oracle, and the listed offices and infrastructure for cloud-based services are in multiple Israeli cities, as well as in some Gulf countries.⁹⁴

Meanwhile, Bahrain moved Gulf Air and cargo planes to alternative airports to keep safe and efficient operations. Iranian attacks on infrastructure across the Gulf continued to disrupt air traffic, hampering efforts to restore flights as the war in Iran entered its 12th day. The war had led to tens of thousands of flight cancellations, rerouting, and schedule changes worldwide, shutting down much of the Middle East's airspace due to missile and drone threats.

The war had plunged aviation into its worst crisis since the pandemic, as Dubai International Airport (DXB), the busiest hub for global passengers, and other regional airports are critical transit points for long-haul travel.

The conflict has also disrupted a key oil export corridor, leading to a spike in jet fuel prices, pushing fares higher on some routes and deepening concern about a broader hit to travel demand. Time-sensitive air cargo was also heavily affected.⁹⁵

Meanwhile, President Trump had downplayed soaring oil prices, arguing that the US benefits from high energy costs. Trump's energy secretary said the US Navy is not yet ready to escort

vessels through the Strait of Hormuz as Iran attacks ships in the waterway. The national average for a gallon of fuel is currently \$3.59 – up from \$2.94 a month ago.⁹⁶

Meanwhile, Israeli aggression in Lebanon continued. Israeli strikes and mass evacuation orders in Lebanon could push the number of displaced people to more than one million within two to three days, said Othman Belbeisi, Middle East and North Africa director of the International Organization of Migration (IOM). Israel issued another evacuation order to residents in southern Lebanon on March 12, nearly doubling the area residents have been told to leave and recommending that they move north of the Zahrani River. More than 800,000 people had already been displaced, the UN's resident and humanitarian coordinator in Lebanon said on March 12. Seven hundred people have been killed by Israeli strikes, according to the Lebanese health ministry.⁹⁷

Former US Secretary of State Kerry said that the energy shock resulting from the US and Israel's war with Iran is one of the worst global crises in decades. "It's very dangerous," Kerry said on March 12. "Hope diplomacy will re-enter in a very forceful way in the next days... It is incredibly important for the world that folks find an off-ramp here." Kerry said the crisis was one of the worst in decades and could get "even more out of control." You've seen what's happened to (energy) prices – that will flow down into everybody's economy if it goes on too long," he said. Having collaborated closely with the Iranians during the negotiations by the Obama administration, which led to the 2015 nuclear deal, Kerry warned that Tehran could drag the conflict out, inflicting further economic pain. "No one should underestimate Iran's capacity to conduct asymmetrical warfare. They have proven it previously. They are practiced at it," he said. "I just don't know to what degree – if at all – those considerations were taken into account here in the (Trump administration's) decision-making."⁹⁸

Meanwhile, the Trump administration said that the first six days of the Iran war cost \$11.3b. The estimate was shared in a closed congressional briefing and, administration officials say, covers the immediate campaign expenses but not the full scope of costs associated with military buildup and ongoing operations. Lawmakers pressing for more detailed figures have been told that the total is expected to rise as further assessments are completed.

Some congressional aides had shown that the Trump administration might seek as much as \$50 billion in supplemental funding for the conflict. Public details about the administration's overall cost projections and the projected duration of the war remain limited.

Trump had publicly characterized the conflict as effectively won, even as Defence officials warned that continued operations would require significant resources.

Meanwhile, Gulf Arab governments had expressed deep anger over Iranian attacks on their territories, but are pushing strongly for diplomacy as the preferred path forward. The Gulf states reject Tehran's justification that strikes on their soil are legitimate because of their alliances with the US. They argued that Iran's interpretation is both exaggerated and strategically flawed, and they have accused Tehran of miscalculating the regional impact of its actions.

Despite public outrage and repeated condemnations, Gulf leaders have reiterated that military escalation is not a solution. They saw robust Defence measures, including missile-intercept systems, as necessary, but stressed that a broader conflict would be damaging for all parties involved.

Most importantly, Gulf leadership was aware of its geographical compulsions. Senior Gulf officials had underscored the necessity of diplomacy, saying that even after the current hostilities end, their countries will remain neighbors to Iran and must find a way to coexist. They have looked to assure their domestic audiences that avoiding deeper involvement in the war is still a top priority, and that restraint and negotiations offer the best chance of long-term stability.

Meanwhile, Iran had set ablaze two tankers in Iraqi waters as it stepped up attacks on oil and transport facilities across the Middle East. Unleashed with joint US and Israeli air strikes on Iran almost two weeks ago, the war has so far killed around 2,000 people and thrown global energy markets and transport into chaos. The conflict has spread across the Middle East and prompted plans for a record release of strategic oil reserves to dampen one of the worst fuel shocks since the 1970s.

The Trump administration had given varying reasons for the war. In announcing the beginning of the US operation, Trump urged Iranians to “take over your government,” but top aides have since denied that the aim was to oust Iran's leadership.⁹⁹ Notwithstanding US and Israeli claims, the war will continue for some time, and it could further spread chaos and conflict across the region. The war against Iran is a war of choice. Undoubtedly, Iran did not pose an existential threat to the US, as it might have done for Israel. But Israel's leadership and US supporters had, in the end, persuaded the Trump administration to wage an unprovoked attack that was a violation of international law. Only a full-fledged ground invasion can change the regime, and that is possible now. Meanwhile, the war will continue unabated and thereby wreck the region further.

President Trump was now faced with a dilemma. Yaroslav Trofimov, in his excellent article “Ending the Iran War Quickly Carries Big Risks for the U.S. and Allies,” published in the Wall Street Journal on March 11, 2026, had aptly argued that:¹⁰⁰

President Trump, faced with rising oil prices and pushback from his MAGA base, was signaling that he wants to wind down the war he launched against Iran less than two weeks ago. But stopping the fighting carries big risks, even if Iran lets him. If Trump proclaims victory, stops the bombing, and begins to withdraw the huge air and naval assets he assembled in the Middle East, it could soothe global markets, at least in the short term, and reassure American voters uneasy about the prospect of another forever war. Leaving the regime undefeated could

motivate Tehran to develop nuclear weapons and leave it in control of much of the world's energy flows.

Thus, President Trump has not yet explained how the war will end or presented a plan to reopen the blocked strait. The US and Israel state that the aim is to destroy Iran's missile and nuclear programs, but Trump has also demanded the destruction of Iran's navy, Iran's "unconditional surrender," and the power to decide its leaders, and more. He does not have any coherent strategy for ending the war. What is now desperately needed is an off-ramp. As the cost of the war rapidly escalates, this is now obvious. However, it will not happen anytime soon, and the war will continue unabated for some time. The region will thereby suffer tremendously, and the global economy, too, will feel the aftershocks. The US is really fighting Israel's war, not its own. As the war costs climb, the Trump administration might realize the mistake. Whether or not it realizes it, it will pay the cost in the coming November mid-term elections. The overwhelming part of Americans, like other nations, do not want their country to be engulfed in another fruitless war in the Middle East. The lessons of American defeats in Afghanistan and Iraq have been learnt by many knowledgeable people, but not the Trump administration. It will surely pay a heavy price for that. The Republican Party will lose power in the coming midterm elections. There was a glimmer of hope of a nuclear deal between the US and Iran just two days before the war began on February 28. But that was not even considered in any serious manner by the Trump administration. Too bad for the US and the Middle East region, and the world.

On March 12, Busaidi, Oman's foreign minister and the mediator in the US-Iran nuclear talks, had claimed the US would not achieve as much through war as it could have achieved in the peace talks. He challenged the premise that the war is about Iran's nuclear program, arguing it was designed to weaken Iran politically. He noted that recent negotiations had reached a very advanced stage, including an Iranian pledge not to have nuclear material capable of producing a bomb, a commitment not to accumulate or store enriched materials, and to convert existing stockpiles into irreversible fuel. Busaidi emphasized that the US could not have obtained greater concessions through war than those achieved through negotiation. He added that the true objective of the war was to weaken Iran, reshape the region, and advance the normalization process within a broader context that also included attempts to prevent the establishment of a Palestinian state and to weaken any country or institution that supports or stands with the Palestinian statehood project. He considered the US and Israeli attacks on Iran a new link in a "dangerous chain of violations witnessed in recent years" and said they threatened to undermine the legal framework that had provided protection and stability to the countries of the region for decades.¹⁰¹

Meanwhile, the war continued unabated. Israel continued to launch strikes on Iran as well as Lebanon and Gaza, targeting militants from the Iran-backed Hezbollah and Hamas. The Israeli military said on March 16 that its troops had begun limited ground operations against positions in southern Lebanon held by Hezbollah.

Despite repeated claims from the US to have destroyed Iran's military capabilities, drone attacks continued to threaten Gulf states on March 16. UAE and Saudi Arabia were hit.

Although some Iranian vessels had continued to pass and a few ships from other countries had successfully made the crossing, the Strait of Hormuz had been effectively closed for most of the world's tanker traffic since the war began. By March 16, the global economy was suffering, and regional events were moving fast. Iran's ability to choke off traffic through the Hormuz Strait had appeared as a major threat to the global economy. Global air travel was still severely disrupted due to the Iran war, which had closed or restricted key Middle Eastern hubs including Dubai, Doha, and Abu Dhabi, forcing airlines to cancel thousands of flights and stranding tens of thousands of passengers. Supplies of jet fuel were also becoming a concern, with authorities in Vietnam warning the country's aviation industry to prepare for potential flight reductions from April after China and Thailand halted exports of jet fuel due to the Iran war.¹⁰²

The Trump administration, responding to economic uncertainty over high oil prices, predicted on March 15 that the war with Iran would end within weeks and that a drop in energy costs would follow, despite Iran's assertion that it remains "stable and strong" and ready to defend itself.

Trump threatened more strikes on Iran's main oil export hub, Kharg Island, and had said previously that Iran wants to negotiate and that the US was talking to Iran, but Iranian Foreign Minister Araqchi on March 15 disputed that claim.¹⁰³

Earlier, Trump, on March 14, called on China, France, Japan, South Korea, Britain, and other countries affected by the curbing of oil supplies through the Strait of Hormuz to join efforts to reopen shipping lanes. "Demanding that these countries come in and protect their own territory because it is their territory," Trump said, "It's the place from which they get their energy." In a social media post, he hoped China, France, Japan, South Korea, Britain, and others would take part. President Trump, on March 15, called on NATO allies to help end the de facto Iranian blockade of the Strait of Hormuz. He also said that he was expecting China to help unblock the strait before his scheduled meeting with Chinese President Xi Jinping in Beijing at the end of this month and might postpone his trip if it did not help. "I think China should help too because China gets 90% of its oil from the Straits," Trump said. "We may delay," he said about his visit if China did not offer support in the Gulf.

But two allies were openly reluctant. Japanese Prime Minister Takaichi said on March 16 that: "We have not made any decisions whatsoever about dispatching escort ships. We are continuing to examine what Japan can do independently and what can be done within the legal framework." Australia said it will not send naval ships to help in reopening the strait either. Trump then had ratcheted up pressure on European allies to help protect the strait, warning that NATO faces a "very bad" future if its members do not come to America's aid. While some European countries said they were discussing ways to help reopen the Strait of Hormuz. Some European officials had pondered whether the EU mission could be part of an effort to restore freedom of navigation in the Gulf.¹⁰⁴

France had been looking to assemble a coalition to secure the Strait once the security situation stabilizes, while Britain is discussing a range of options with allies to ensure the security of shipping.¹⁰⁵

On March 16, China responded when a spokesperson for China's foreign ministry said "head-of-state diplomacy plays an irreplaceable strategic guiding role in China-US relations", before adding "the two sides have maintained communication regarding President Trump's visit". In response to a question about Trump calling for warships to be sent to the Strait, Lin Jian says that recent tensions have disrupted trade routes and undermined regional and global peace. The spokesperson further said that "China reiterates its call for all parties to immediately cease military operations," the spokesperson says, and adds, "we are committed to promoting de-escalation".¹⁰⁶

Michael D. Shear, 'This Is Not Our War': Europe and U.K. Push Back Against Trump's Demands," published in the New York Times, March 16, 2026, aptly put it as:¹⁰⁷

As President Trump's assault on Iran enters its third week, European leaders are resisting his bellicose demands for help in reopening the Hormuz. At the same time, they are trying to avoid irreparably damaging their relationship with the United States over their opposition to another war of America's choosing. To Mr. Trump, it should hardly be a difficult decision. He views Europe's action — or inaction — in the face of the strait's closure as a test of its commitment to the continent's own security. Sending their navies for what he called a "very small endeavor" is the least that Europe's presidents and prime ministers can do, Mr. Trump suggested over the weekend.

Several US allies had rebuffed Donald Trump's call on March 16 to send warships to escort tankers through the Strait of Hormuz, drawing criticism from the US president, who accused Western partners of ingratitude after decades of support.

The war was now in its third week with no end in sight. The critical Strait of Hormuz stays closed off, raising energy prices and fears of inflation. The conflict has already imposed economic costs on US allies, who had not consulted before the airstrikes on Iran and who had endured months of harsh criticism and bellicose threats from Trump.

Several US partners, including Germany, Spain, and Italy, said they had no immediate plans to send ships to help reopen the strategic waterway, which Iran had effectively shut with drones and naval mines.

"We lack the mandate from the United Nations, the European Union, or NATO required under the Basic Law," German Chancellor Merz said, adding that the US and Israel had not consulted Germany before launching the war.¹⁰⁸

Trump said many countries had told him they were prepared to help, but voiced frustration with some long-standing allies. "Some are very enthusiastic about it, and some aren't," he said, without offering specifics. "Some are countries that we've helped for many, many years. We

have protected them from horrible outside sources, and they were not that enthusiastic. And the level of enthusiasm matters to me."¹⁰⁹

Meanwhile, Israel said on March 16 that it had drawn up detailed plans for at least three more weeks of war as it pounded sites across Iran overnight, while Iranian drone attacks temporarily shut Dubai airport and hit a key oil facility in the UAE. Israeli troops pushed into new parts of southern Lebanon, part of an expanding operation after Hezbollah fired rockets in Israel in retaliation for the killing of Iran's supreme leader.

In a joint statement, Canada, France, Germany, Italy, and Britain warned that any "significant Israeli ground offensive would have devastating humanitarian consequences and could lead to a protracted conflict," and that such an operation "must be averted." Israel has said it wants to weaken Iran's capacity to threaten it, striking ballistic missile infrastructure, nuclear facilities, and the security apparatus, and that it still has thousands of targets to hit. "We want to make sure that they are as weak as possible, this regime, and that we degrade all their capabilities, all parts and all wings of their security establishment," Israeli military spokesperson Lieutenant Shoshani said. On March 13, Iran said it would target oil and gas facilities in any country from which US attacks were launched on Kharg Island. Foreign Minister Araqchi said Tehran had not asked for a ceasefire or exchanged messages with the US.¹¹⁰

The IRGC said earlier that Iran had launched strikes on areas in Tel Aviv, the U.S. Al Dhafra Air Base in Abu Dhabi, the U.S. naval base in Bahrain, and Bahrain's Sheikh Isa Air Base. On the UAE's coast along the Gulf of Oman, oil loading operations at the port of Fujairah partially resumed after an Iranian drone strike. Fujairah is a key export point for the UAE's Murjan crude, a volume equivalent to 1% of global demand.

Flights at Dubai International Airport, one of the world's busiest, were suspended for several hours after a drone strike on a nearby fuel storage facility sent plumes of black smoke into the sky. Saudi Arabia intercepted thirty-four drones in its eastern region in one hour, state media said. No injuries were reported in either incident.¹¹¹

Despite the turbulence, oil prices, which had been above \$100 a barrel, fell, and stocks rallied after US Treasury Secretary Bessent maintained that the US was "fine" to let some Iranian fuel vessels through the strait, and believed Indian and Chinese tankers had also passed through.

Meanwhile, in the first two weeks of March, Iranian drones and missiles had struck targets in the Gulf states that included US military bases and an UAE base hosting French troops, civilian structures, including hotels, airports, and energy facilities. Iran had also halted all shipping through the Strait of Hormuz, causing global energy prices to spike.¹¹²

On March 17, Iran launched fresh attacks on the UAE and Israel overnight, underscoring that it had reached the capacity to conduct long-range strikes despite more than two weeks of pounding by US and Israeli weapons. Israel said it was targeting "Iranian regime infrastructure" with a new wave of strikes across Tehran, as well as Hezbollah sites in Beirut, a day after saying it had drawn up detailed plans for at least three more weeks of war with Iran. Rockets and at least five drones targeted the US embassy in Baghdad.¹¹³

Iranian attacks on the UAE had forced the temporary closure of airspace, and a drone hit an oil facility in Fujairah, a key port for UAE oil exports, for a second consecutive day.

Trump earlier accused some Western allies of ingratitude after several countries rebuffed his demand to send warships to escort oil tankers in the strait. Trump said many countries had told him they were prepared to help, but voiced frustration with some long-standing allies.

Anthony Zurcher, in his informative article "Surge in US petrol prices deepens political peril for Trump over Iran," published in the BBC News, March 17, said:¹¹⁴

In the third week of the joint US-Israeli war against Iran, Donald Trump faces decisions that could define the rest of his presidency. But if the American commander-in-chief is grappling with a war of choice that seems in danger of spiraling in ways he cannot control, those concerns are not playing out in public.... American presidents have learned the hard way that war can consume a presidency, whether they want it to or not. And evidence continues to mount that a war that Trump had previously said was "already won" and "very complete" now has a timeline that could stretch for weeks or even longer.

President Trump was now facing increasing criticism of his claims and conduct of the war. He had been warned that attacking Iran could trigger retaliation against its Gulf allies despite his claims on March 16 that Tehran's reaction came as a surprise, according to US intelligence reports. Pré-war intelligence assessments did not say that Iran's response was a guarantee, but it certainly was on the list of potential outcomes. Surprisingly, Trump twice, on March 16, said that Iran's retaliatory strikes against Qatar, Saudi Arabia, the UAE, Bahrain, and Kuwait were a surprise. He said that: "They (Iran) weren't supposed to go after all these other countries in the Middle East," he said. "Nobody expected that. We were shocked."

Trump's assertion followed other administration claims that have not been backed by US intelligence reporting, such as that Iran would soon have a missile capable of hitting the US homeland and that it would need two to four weeks to make a nuclear bomb and would then use it. Those allegations and an imminent threat posed by Iran to the US and its forces in the region have been among the varying reasons that Trump and some top aides have given to justify his decision to join Israel in launching their air war against Iran on February 28. Trump was also briefed ahead of the operation that Tehran would look to close the economically vital Strait of Hormuz.¹¹⁵

Earlier, Democratic lawmakers appeared from administration briefings on the war and said that they heard of no imminent threat that required the US and Israel to launch the war.

Trump repeated his claim on March 16 when he was asked if he was surprised that nobody had briefed him about the risk that Iran would strike back at the Gulf states. "Nobody, nobody, no, no, no. The greatest experts, nobody thought they were going to hit," replied Trump.¹¹⁶

The Pentagon confirmed that seven US military personnel had been killed. More than 100,000 people had been forced to flee Tehran, according to the UN Human Rights Council. In southern Lebanon, hundreds of thousands of civilians had left their homes in the face of Israeli attacks targeting the Iran-backed group Hezbollah. Tens of thousands of foreign nationals were leaving the region.

The opposition to the war was growing all over the world, even in the US. Democratic Senator Hollen said Congress should not fund the Trump administration's assault on Iran. "Not one more dime for an illegal war of choice that is making us less safe," Van Hollen wrote on X. "The best way to protect our troops, end the killing of school children and civilians, reduce skyrocketing oil and gas prices, and stop wasting billions of taxpayer dollars is to cut off the funding." In the US system, Congress distributes money to the federal government, including the Pentagon. With Trump's Republican Party in control of the Senate and the House of Representatives, Democrats were unlikely to succeed in defunding the war. But the push highlights the growing opposition to the conflict, which Trump launched without congressional approval.¹¹⁷

Notwithstanding the claims of the Trump administration and Netanyahu's government, the US-Israel war of choice on Iran is a violation of international law. The Guardian's editorial entitled "The Guardian view on the Iran war and international law: it's worse than a mistake; it's a crime" on March 13, 2026, brilliantly said that:

When Russia launched its full-scale invasion of Ukraine in 2022, the international condemnation from Europe and elsewhere was loud and clear. Leaders did not expect legal threats to shift Vladimir Putin or end war crimes by his troops. But they understood the importance of naming what had happened as an illegal act of aggression, and of looking to hold those responsible accountable. The same countries have been strikingly muted since the US and Israel launched their war on Iran. This, too, was an act of aggression. Spain's Pedro Sánchez has been lonely in his forthright condemnation, though Norway and others also pointed to the breach of international law. Meanwhile, Australia's prime minister, Anthony Albanese, offered unreserved support, and Germany's chancellor, Friedrich Merz, declared that it was "not the moment to lecture our partners and allies." As in Ukraine, the original sin has quickly been compounded, with the deaths of over a thousand civilians reported in Iran alone – including in the strike on a girls' school which killed at least 175 people, mostly children:

evidence points to US responsibility. Serious violations of the laws of war, reckless as well as deliberate, constitute war crimes. The US Defence secretary, Pete Hegseth, declared on Friday that “no quarter will be given” to the enemy – a violation of international humanitarian law. Israel’s attacks on Lebanon, in retaliation for Hezbollah attacks defending Iran, are at a minimum disproportionate – as Katja Kallas, the EU foreign affairs chief, has implied – with vast civilian displacement and damage to infrastructure. That Iran is also committing war crimes does not lessen US or Israeli culpability. The contrast between the West’s rhetoric about universal standards and its selective outrage is glaringly and increasingly clear to people around the world.... Each time, the belief in international law as an essential framework for conduct was further undermined. Each time, an implicit license was given for further breaches. Double standards reflect disquiet about the Venezuelan and Iranian regimes, fear of angering the US president, and the prioritization of Ukraine’s needs. But some are also adopting US arguments. When Donald Trump declared that his “own morality” was the only limit on his global powers, the problem was not merely his character. Yet as the war on Iran began.... The difficulty of upholding international law and the limits of its scope are no reason to jettison it. If those who lament the decline of the rules-based order remain complicit with the erosion of law, we will all be in greater danger.

William Roberts, in his thought-provoking article “US presidency: attack on Iran set to test War Powers Resolution in confrontation with Congress,” published by the International Bar Association on March 16, had argued that: ¹¹⁸

US President Donald Trump’s bombing campaign against Iran, launched alongside Israel in February without the support of NATO allies, is a strategic gamble that appears to have been taken hastily and without clearly defined aims. The war saw the assassination of Iran’s leader, the Ayatollah Ali Khamenei, on the first day of hostilities. President Trump and his administration officials have offered shifting justifications for the war, including seeking regime change in Tehran and preventing the country from obtaining nuclear weapons. They have also highlighted a need to destroy Iran’s ability to attack the US and Israel, and to disrupt its support for regional proxy groups. US Secretary of State Marco Rubio has also said that the US was aware that Israel was going to act against Iran and therefore had to act ‘pre-emptively,’ given that American forces were set to come under attack from Tehran. International lawyers and national security experts say the American Israeli attack highlights a significant lack of legal justification for the use of force and US presidential war powers. The Trump administration has not put forward any information that Iran was imminently initiating hostilities... Many commentators agree that the Trump administration has failed to provide a practical justification for the attack. Trump himself undercut any rationale he might have had for some sort of urgency or imminence. What we are left with is just a war of choice launched by two states.President Trump’s idea of diplomacy is that he sends over a set of demands, and he expects the other side to capitulate to them,’ says Adam Weinstein, Deputy Director of the Middle East program at the Quincy Institute for Responsible Statecraft in Washington, DC. Weinstein believes the Trump administration does not have an ‘end state’ in mind for the war. ‘If you listen to the Trump administration officials, the reasons keep changing,’ he says. First,

they want to destroy the missile capacity. Then they say it is because Israel was going to attack anyway. Now, [President Trump is] saying that he wants a part in choosing the next leader of Iran.' Weinstein adds that the Trump administration continues to update the timeline for the conflict, from days to weeks, to months. Domestically, President Trump appears to have been aiming for a quick political victory like the capture of President Nicolás Maduro from Venezuela in January. But the attack on Iran is proving controversial.

Despite the US and Israeli attacks, Iran's oil production and exports continue without interruption. Kharg Island serves as Iran's main oil export hub, being 90% of the OPEC member's oil shipments. Military assets on the island were struck by the US earlier. Iran reiterated its threat that any foreign attack on Kharg Island would lead to "a greater humiliation than the Strait of Hormuz", where Tehran has prevented the passage of vessels it says are linked to the US, Israel, and their allies.¹¹⁹

On March 17, the price of oil was hovering around \$103.15 a barrel, dipping after a spike of \$105 in early trading. The movement in oil prices comes as the Iraqi oil minister said they were in contact with Iran to allow some oil tankers to pass through the Strait of Hormuz.

Major Chinese oil companies had also started making inquiries with Russian crude oil suppliers after the US waived sanctions in a bid to ease pressure on global oil supplies. Oil prices had jumped since the war began, and crucial access to the Strait of Hormuz was disrupted. But prices eased on March 16 after reports that several ships had been able to safely navigate the channel.¹²⁰

Given Iran's desperate situation and threat of collapse, it is being quietly backed by both Russia and China, which is bound to increase in scope. Iran is proving resilient as it was prepared for the war. Both the US and Israel had underestimated Iran's resilience, underlying unity, fierce nationalism, and even war preparedness.

Meanwhile, the question both Trump and Netanyahu face now is: without regime change in Tehran, how long before the next time?

The damage to Iran's weapons program this time is far deeper than before. Iran's production sites and leadership were targeted alongside missile stocks and launchers. The US and Israel planned their joint attack on Iran together over several months. There is a political risk for Netanyahu in leaving the regime intact. Hamas still controls half of Gaza. Hezbollah is now putting up a much bigger fight than imagined, and after the June 2025 war against Iran, Israel and the US are back in an even bigger war against Iran. Netanyahu has made a career out of defending Israel against the so-called Iranian threat. He is now facing a tricky situation.¹²¹

Meanwhile, in a most bewildering manner, public fury in Washington was notably scarce across the Gulf states, even as they absorbed some of the heaviest shocks of a regional war that they had urged the US to avoid. With few exceptions, senior Gulf figures had avoided publicly blaming Washington for its decision to confront Iran. Gulf capitals are reserving the language of

betrayal for Tehran, not for the US, even as American actions helped set the conflict in motion. A rare public deviation came from Emirati tycoon Habtoor, who briefly challenged Trump over “dragging” the region into war before retracting the comments, a sign of tight unease inside Gulf circles about Washington’s choices. Aramco CEO Amin Nasser pointedly avoided criticizing Washington on March 17, even as he warned that the disruption had triggered “a severe chain reaction” with potentially “catastrophic” consequences for global oil markets.¹²²

Iran’s behavior had made this restraint easier to keep. After years of slow rapprochement and assurances from Gulf Arab states that their territory would not be used to launch attacks on Iran, many expected Tehran to acknowledge those efforts. Gulf officials had even mounted an intense round of diplomacy in January, warning Washington and Tehran alike that a US strike on Iran would trigger exactly the kind of regional blowback now unfolding. Instead, Iran struck Gulf Arab territory on day one and has rattled Gulf capitals ever since. Qatar’s Prime Minister called Iran’s moves a “betrayal,” saying they were preplanned and unleashed despite Gulf guarantees of neutrality. Doha had worked to preserve “a peaceful neighborhood” and ease US–Iran diplomacy, he said, but Iran’s miscalculation “destroyed everything.”¹²³

The US had given shifting rationales for joining Israel to attack Iran and struggled to explain the legal basis for starting a new war. Finally, Joseph Kent, the head of the United States National Counterterrorism Centre (NCTC), resigned on March 1. He became the first and most senior member of President Trump's administration to resign over the war in Iran. Kent wrote in his resignation letter to Trump that Iran "posed no imminent threat to our nation." He posted that:¹²⁴

Cannot in good conscience support the ongoing war in Iran. Iran posed no imminent threat to our nation, and we started this war due to pressure from Israel and its powerful lobby...Until June of 2025, you understood that the wars in the Middle East were a trap that robbed America of the precious lives of our patriots and depleted the wealth and prosperity of our nation...Early in this administration, high-ranking Israeli officials and influential members of the American media deployed a misinformation campaign that wholly undermined your America First platform and sowed pro-war sentiments to encourage a war with Iran...This echo chamber was used to deceive you into believing that Iran posed an imminent threat to the US, and that should you strike now, there was a clear path to a swift 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.....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.

Some experts had said an imminent threat would be needed for the US to launch a war under current law. As expected, Trump accused Kent of being "very weak on security" and said it is a "good thing that he's out".

Earlier, Trump administration officials had acknowledged in closed-door briefings with congressional staff that there was no intelligence suggesting Iran planned to attack US forces first. ¹²⁵

On March 18, President Trump earlier lashed out at NATO allies over their reluctance to support U.S. efforts in Iran. Most US allies in NATO had told Trump they do not want to get involved in the conflict, he said, describing their position as "a very foolish mistake."

Meanwhile, Iran had responded to the Israeli-U.S. attacks with wide-ranging strikes on its Gulf neighbors. Gulf Arab states had faced more than 2,000 missile and drone attacks on US diplomatic missions and military bases, as well as oil infrastructure, ports, airports, ships, and residential and commercial buildings, and most of them aimed at the UAE. ¹²⁶

Trump said the US had already decimated Iran's navy and air force and no longer needed help from NATO, Japan, Australia, or South Korea.

Israel killed Larijani, Iran's security chief and the head of its Basij paramilitary force, in strikes. They were the most prominent figures in the regime since Supreme Leader Ali Khamenei was killed on the first day of the war. A defiant Iran said Israel's killing of the security chief and other key officials would not hinder its operations, with replacements swiftly appointed, as Israel launched a swathe of strikes against Iran-backed Hezbollah in Lebanon. Iran's Foreign Minister Araqchi said the US and Israel did not understand that the Islamic Republic was a robust political system and did not depend on any single individual. The death of senior officials would not disrupt governance, and the state would continue to function, Araqchi said on March 18. ¹²⁷

On March 18, the U.S. military dropped 5,000-pound deep-penetrator bombs along Iran's coast near the Strait of Hormuz to take out hardened sites with anti-ship cruise missiles, according to U.S. Central Command.

Iranian missiles hit Tel Aviv and caused heavy damage across central Israel. Two people died from shrapnel injuries in the strikes. ¹²⁸

Iran targeted Tel Aviv with missiles carrying cluster warheads in what it said was retaliation for Israel's assassination of Larijani. The weapons used included Khorramshahr 4 and Qadr missiles, both of which carried multiple warheads. Israeli authorities said the attacks killed two people in

Tel Aviv, where there are also key military facilities, bringing the death toll in Israel from the war to at least 14.

Meanwhile, the war showed no signs of de-escalation three weeks in, with Iran's new supreme leader, Mojtaba Khamenei, attending his first foreign-policy meeting since his appointment, rejecting proposals conveyed to Iran for "reducing tensions or ceasefire with the US." Khamenei said it was not "the right time for peace until the US and Israel are brought to their knees, accept defeat, and pay compensation."¹²⁹

Meanwhile, the latest strikes had sucked Lebanon deeper into the war in the Middle East after Hezbollah attacked Israel on March 2, saying it aimed to avenge the killing of Iran's supreme leader. Israel has responded with an offensive that has killed more than 900 people in Lebanon and forced more than 800,000 people from their homes. The US-based Iran human rights group HRANA said on March 16 that an estimated 3,000-plus people have been killed in Iran since the U.S.-Israeli attacks began at the end of February. Iranian attacks have killed people in Iraq and across the Gulf states, as well as in Israel.¹³⁰

The US military said on March 17 it had targeted sites along Iran's coastline near the Strait of Hormuz with powerful "bunker buster" bombs because Iranian anti-ship missiles posed a risk to international shipping there.

The Strait stayed closed as Iran threatened to attack tankers linked to the US and Israel. Oil prices had soared. Meanwhile, Trump had repeatedly castigated allied countries in recent days for their cool response to his requests for military help to restore the passage of oil tankers through the Strait of Hormuz.¹³¹

With no signs of a de-escalation in fighting, oil prices have been up around 45% since the start of the war, raising concerns about a renewed spike in global inflation. The World Food Program said tens of millions of people will face acute hunger if the war continues through June. Global airlines sounded the alarm on March 17 over soaring jet fuel prices, warning of hundreds of millions of extra costs, higher fares, and cuts to some routes. Global aviation has been thrown into turmoil, with flights cancelled, rescheduled, or rerouted as most Middle East airspace is still closed amid fears of missile and drone attacks.¹³²

Earlier, Trump had missed an excellent opportunity on February 26 when a nuclear deal was just in the making. Wintour, in his brilliant article "How ignorance, misunderstanding and obfuscation ended Iran nuclear talks," The Guardian, March 18, 2026, said:¹³³

In the many bizarre exchanges that occurred in the run-up to the US-Israeli attack on Iran, perhaps the most unexpected was an invitation by Donald Trump's special envoy Steve Witkoff for the Iranian foreign minister, Abbas Araghchi, to join him and Trump's son-in-law, Jared Kushner, for a visit to the USS Abraham Lincoln carrier strike group. The idea that Araghchi

would leave talks in Oman about the future of Iran's nuclear program to tour a ship sent to the Gulf to dislodge his government seemed idiosyncratic at best. But it was symptomatic of the unorthodox way in which Kushner and Witkoff approached the nuclear talks that stretched through last year and this and have twice been halted by Israeli and US airstrikes. One Gulf diplomat, who has direct knowledge of the talks and is furious with Witkoff and Kushner's behavior, described the pair as "Israeli assets that had conspired to force the US president into entering a war from which he is now desperate to get himself out of". Witkoff does not pretend to regional expertiseQuite why these indirect talks failed is not just a matter of historical curiosity, or a retrospective exercise in allocating blame for the start of such a disastrous war; it is relevant to whether a nuclear deal only is feasible or whether a broader agreement will be necessary now. This matters because after the war, if Iran's government survives, calls inside the country to obtain a nuclear weapon will inevitably grow. ...The Iranians now say they believe the talks were always a subterfuge, designed to create space for the US to assemble its military armada. Witkoff, for his part, said the Iranians were being "deceptive," "full of subterfuge," and "smelled fishy." The kernel of what was proposed in Geneva is slowly emerging. British officials briefed on its contents thought it was a good deal and something to be built on, partly because, unlike the 2015 nuclear deal, there were no sunset clauses. A plan for a US-led regional enrichment consortium, which had been central to the earlier round of talks, had gone. A broad agreement was made for the return of full International Atomic Energy Agency oversight. Under IAEA monitoring and verification, Iran would get rid of its stockpile of 440kg of uranium already enriched to 60%. The stockpile, now thought to be under the rubble of the Fordow plant, would not be exported abroad, as had been proposed in the past, but down blended, a process recognized as largely irreversible. The biggest roadblock was that Iran refused to abandon its insistence on the right to enrich uranium for its future nuclear program, and this would require eventually being allowed to run thirty centrifuges, far fewer than at present. The threat they posed depended on the quality of the inspection regime. Iran accepted that due to the destruction of their Fordow and Natanz enrichment plants, there would be a multiyear pause in enrichment. On the final day of talks in Geneva, Iran offered a three-to-five-year moratorium, pausing the end of the Trump presidency, but after a phone consultation with Trump during a lunchtime break, Witkoff came back insisting on 10 years. The US said it would pay for nuclear fuel to be imported over that decade. By that final day – two days before the US and Israel launched their attack – the two negotiating teams had also reached agreement on the lifting of 80% of the sanctions imposed on Iran, a source involved in the talks said. Oman said at least three more months were needed to work on the details. It was certainly closer than the maximalist US demands on 29 May last year, a fortnight before Israel launched the 12-day war on Iran on 13 June. Before the final talks, Iran again allowed it to be known that the US would face a "commercial bonanza" if it signed up to the deal. Hamid Ghanbari, a deputy foreign minister, told Iranian businesspeople this month that "common interests in the fields of oil and gas, including joint fields [with neighboring countries], as well as investments in mining and even the purchase of civilian aircraft, have been included in the talks with the US". Once the Geneva talks ended, with both sides only signing up to a statement about progress made, it was obvious to the Omani foreign minister that war was imminent, and he dashed to Washington to explain how close he felt the two sides were to a breakthrough. But his proposal of zero stockpiling did not have the same force as zero enrichment. The dash across the Atlantic

reflected Oman's belief that Witkoff and Kushner, either knowingly or through ignorance, were not feeding Trump the truth about the progress in the talks. There was also doubt about Trump's focus. One earlier attempt to engage Trump on the status of the talks deteriorated when the president switched the conversation to one of his favorite topics: shoes. In retrospect, it might have been better to send a more senior emissary to try to hold Trump's attention. A day later, the war started...Katariina Simonen, adjunct professor at the Finnish national defense university, said: "The Trump administration is very impenetrable. It is a closed circle. The US arms control community has been at pains to offer real expert advice on nuclear physics, but the Trump team does not seem interested. The biggest frustration is that this deal would have allowed the IAEA back into Iran, and so many issues could then have been resolved.

Undoubtedly, Iran wanted to develop a nuclear deterrent capability much like its archenemy, Israel, and others like Pakistan and North Korea. However, it was then willing to compromise on the nuclear weapons issue. Given the dismal internal situation, Iran then had little choice in the matter. Therefore, it was indeed willing to enter a new nuclear deal with the US. Most importantly, Iran had then expressed hope that negotiations could bear fruit, but it had rejected what it said were a series of maximalist US demands on issues such as nuclear enrichment, ballistic missiles, and support for regional proxies.

Certainly, Arachis was the man who could have gotten it done. He had been Iran's top diplomat since 2014, and played a key role in negotiations that led to Tehran's 2015 nuclear deal with world powers. The agreement was torn up by Trump in 2018.

Political insiders said he enjoyed the full confidence of Supreme Leader Ayatollah Ali Khamenei, describing him as one of Iran's most powerful foreign ministers yet.¹³⁴ Therefore, it would have been wise for the Trump administration to have avoided going to war with Iran and instead negotiated a better nuclear deal than the JCPOA nuclear deal of 2015 during the Obama administration. Most importantly, wars are politicized by other means, as realists believe, and the US does not have a cogent political rationale for one. Another principle of International Relations is that states do not have foes or friends, only national interests. It is not in the national interest of the US to wage a war with Iran, especially when an overwhelmingly substantial number of its citizens are against the idea of war with Iran. Therefore, it would have been wise for the Trump administration to have let the diplomatic approach play out further without thwarting it in any way or fashion. There was then a glimmer of hope that a new nuclear deal could be achieved between the US and Iran. Emphasis on other matters like ballistic missiles and regional proxies was unrealistic and could have been avoided. Wisdom required that the US had then given peace a chance and not listened to Israel, for once. A disastrous catastrophe could have been avoided, as there was still a present window of opportunity for a nuclear deal.

Iran, on March 18, following strikes on its own energy infrastructure in South Pars and Azaliyah, attacked the world's largest gas plant in Qatar, targeted a refinery in Saudi Arabia, forced the

UAE to shut gas facilities, and attacked two Kuwaiti refineries. Tehran's retaliation against Israeli attacks on its own gas facilities marks a further escalation of the three-week war.¹³⁵

The Iranian attacks, which drew a furious response from US President Donald Trump. He warned Iran not to attack Qatari LNG facilities again and threatened to "massively blow up the entirety of the South Pars Gas Field" if it did so. He said Israel had attacked South Pars without informing Qatar or the U.S.¹³⁶

The Iranian attack had hit Qatar's terminal for shipping out liquefied natural gas. Qatar normally supplies some 20% of the world's consumption of LNG, which can be carried by ship. The facility shut down after a drone attack. The closure of the Strait of Hormuz to most tanker traffic also left the gas nowhere to go. The impact on the global economy was immediate.

Global oil and natural gas prices soared on March 19, after Iran attacked a key natural gas facility in Qatar that can supply one-fifth of the world's gas, as well as two oil refineries in Kuwait. The attacks added to fears that the energy crisis triggered by the closure of the Strait of Hormuz to tanker traffic may be longer and more extensive than feared, with lasting damage to oil and gas production.¹³⁷

On March 19, oil and gas prices rose sharply after fresh strikes hit energy infrastructure in the Middle East, including Qatar's main gas facility. Gas prices jumped by about 25% on wholesale markets in the UK and Europe in early trading, before falling slightly. The price of gas in Europe had more than doubled the level seen when the war began. Oil prices are also trading higher, with Brent crude jumping 10% to above \$119 a barrel at one point, before slipping back.¹³⁸

Brent crude, the international benchmark, rose to \$116.38 per barrel, up from under \$73 per barrel on the eve of the war. The European TTF benchmark for natural gas prices traded 24% higher on March 19. U.S. benchmark crude oil gained 1.1% to \$96.45 a barrel, while the Henry Hub future contract, the benchmark for US natural gas, gained 5.1%. As oil and gas prices spiked, world shares retreated, and US futures edged 0.2% lower. Germany's DAX lost 2.1% to 23,015.40, and the CAC 40 in Paris fell 1.5% to 7,848.88. Britain's FTSE 100 shed 1.7% to 10,134.02. In Asian share trading, Tokyo's Nikkei 225 fell 3.4% to 53,372.53 as the Bank of Japan opted to keep its benchmark interest rate on hold at 0.75%, citing the war with Iran as one factor. In Hong Kong, the Hang Seng slipped 2% to 25,500.58, while the Shanghai Composite index shed 1.4% to 4,006.55. Australia's S&P/ASX 200 lost 1.7% to 8,497.80, and Taiwan's Taiex fell 1.9%. In India, which has also suffered from shocks to supplies of oil and gas, the Sensex lost 2.7%. On March 17, the S&P 500 fell 1.4%, dropping to a loss for the week so far. The Dow Jones Industrial Average dropped 1.6%, and the Nasdaq composite slid 1.5%. The losses deepened after the Fed decided to keep its main interest rate steady, instead of resuming cuts meant to give the jobs market and economy a boost. A report released on March 17 showed inflation pressures were already being built before the war began. It said inflation at the U.S.

wholesale level unexpectedly accelerated last month to 3.4%. On March 19, the US dollar fell to 159.10 Japanese yen from 159.88 yen. The euro rose to \$1.1463 from \$1.1453. If the disruptions from Iran's attacks on its Gulf Arab neighbors' energy infrastructure kept oil and gas prices high for long, they could create a debilitating wave of inflation for the global economy.¹³⁹

Earlier, as the war neared the three-week mark, most of Iran's major energy facilities, as well as major assets in nearby countries, had been targeted. However, the Islamic Revolutionary Guard Corps (IRGC) denied that U.S. and Israeli airstrikes have crippled Iran's ability to produce missiles. Iran projected defiance, with the new supreme leader declaring that "safety must be taken away" from the country's enemies and its armed forces vowing to pursue them even in tourist spots.¹⁴⁰

Iran had effectively blocked the Strait of Hormuz since the war began. The impact has been severe. Bounded to the north by Iran and to the south by Oman and the UAE, the waterway is only about 50km (31 miles) wide at its entrance and exit, and about 33km wide at its narrowest point. The Strait of Hormuz connects the Gulf with the Arabian Sea. About 20% of the world's oil and liquefied natural gas (LNG) usually passes through the strait, with oil coming not only from Iran but also from other Gulf states such as Iraq, Kuwait, Qatar, Saudi Arabia, and the UAE.

The impact of closing the Strait had been severe. About 3,000 ships usually sailed through the strait each month, but this had dramatically decreased recently, with Iran threatening to attack tankers and other ships. At least 21 vessels had been hit or targeted, or had reported attacks, since the start of the war on March 18. Global fuel prices had soared in the wake of the war. Crude oil had risen above \$100 a barrel - up almost 70% this year and 50% from a year ago.¹⁴¹ Meanwhile, Qatar's energy minister said Iranian strikes on LNG facilities reduced the country's export capacity by 17%.¹⁴²

The benchmark price of Brent crude oil was up slightly, near \$110, after surging the day before on growing fears that the largest ever disruption to world energy supplies would trigger a global economic shock. Israel did promise to avoid further attacks on Iran's South Pars gas field the day after an Iranian retaliatory strike on Qatar caused damage that will leave the world short of natural gas for years to come. Kuwait's state oil firm said its Mina Al-Ahmadi refinery had suffered multiple drone attacks that set some units alight. Flows of crude and petroleum have dropped by about twelve million barrels per day - 12% of global demand - due to output cuts and export halts by Gulf producers. Those barrels cannot easily be replaced by the transport, shipping, and manufacturing industries that rely on them, and will make themselves felt for years. International Energy Agency (IEA) chief Fatih Birol said that restoring oil and gas flows might take six months.¹⁴³

The escalating war had severely disrupted Middle Eastern energy infrastructure and global oil and gas flows. Israeli strikes on Iran's South Pars gas field and the Azaliyah processing hub on March 18 triggered a wave of retaliatory attacks across the Gulf that hit refineries, gas plants, and export terminals in Saudi Arabia, Kuwait, Qatar, the UAE, and Bahrain. Multiple key facilities had been damaged or shut down. Drone and missile attacks struck refineries and LNG plants in Saudi Arabia, Kuwait, and Qatar, while missile debris forced the shutdown of the UAE's massive Hasham gas complex and repeated attacks targeted its Fujairah export terminal.

Bahrain declared force majeure after its Sitra refinery was attacked, and Iraq sharply cut output from its southern oilfields despite avoiding direct strikes. Several export hubs were spared direct damage but saw operations halted due to security threats, intercepted missiles, or precautionary shutdowns.

Iran's military said strikes on Iran's energy infrastructure had led to "a new stage in the war," in which it had attacked energy facilities linked to the US. "If strikes (on Iran's energy facilities) happen again, further attacks on your energy infrastructure and that of your allies will not stop until it is destroyed," Iranian military spokesperson Ebrahim Zulfikar said.

Qatar Energy's CEO said the Iranian attacks had knocked out a sixth of Qatar's LNG export capacity, worth \$20 billion a year, and that repairs would take three to five years. Israeli media reported that an Iranian strike hit oil facilities in Israel's port of Haifa, causing damage but no casualties.¹⁴⁴

The strikes on regional energy facilities underscored Iran's continued ability to exact a heavy price for the U.S.-Israeli campaign, and the limits of air defenses in protecting the Gulf's most valuable and strategic energy assets.

The disruptions have sent energy prices surging worldwide. Middle East crude benchmarks hit record highs, U.S. diesel prices rose above \$5 a gallon, and gasoline reached its highest level since late 2023. Asian refiners cut runs amid feedstock shortages, while governments from China to South Korea imposed export controls or price caps. The International Energy Agency called for a historic release of 400 million barrels from global reserves, underscoring the scale of the shock to energy markets and consumers.¹⁴⁵

Germany, Britain, France, Italy, the Netherlands, and Canada, as well as NATO non-member Japan, pledged in a joint statement to join "appropriate efforts to ensure safe passage through the Strait." The leaders of Germany and France, however, made clear that this presupposed an end to the fighting.

President Trump again lashed out at NATO members for not joining a US effort to open the Strait of Hormuz, calling the alliance "A PAPER TIGER" on social media.¹⁴⁶ He said they were "COWARDS, and we will REMEMBER!" he wrote. The US allies were not consulted in the conflict with Iran.¹⁴⁷

Earlier, on March 26, three more US warships and 2,500 more Marines were bound for the Middle East, where the US military said it had about 50,000 troops. The Pentagon's request for

another \$200 billion to fund the war would need congressional approval, as the US national debt had hit a record \$39 trillion.

Meanwhile, Iran fired on Israel and energy sites in neighboring Gulf Arab states, insisting that it can still build missiles and issuing a new threat to deny safety to its enemies in “parks, recreational areas, and tourist destinations” worldwide. Israel, meanwhile, pounded Tehran with airstrikes.

Prime Minister Netanyahu said that Iran can no longer enrich uranium or make ballistic missiles. U.S. leaders said weeks of US strikes have decimated Iran’s military. Little information has come from Iran about damage to its weapons and energy facilities since the war began three weeks ago. Netanyahu said Israel will refrain from any further attacks on the Iranian gas field at the request of Trump. Iran responded to Israel’s attack on the field, which Iranians depend on for their electricity, by intensifying targeting of energy infrastructure in other Middle East countries, sending oil and gas prices soaring.¹⁴⁸

Meanwhile, more than 1,300 people in Iran have been killed during the war. Israeli airstrikes have killed over 1,000 people in Lebanon and displaced more than one million, according to the Lebanese government. In Israel, fifteen people have been killed by Iranian missile fire. At least 13 US military members had been killed. Four Palestinians in the occupied West Bank were killed on Wednesday as Israel and Iran exchanged airstrikes.¹⁴⁹

John Hudson, Warren P. Strobel, and Steve Hendrix, in their article “U.S.-Israeli rift widens over potential endgame in Iran,” published in the Washington Post on March 20, said that:¹⁵⁰

Israel’s assault on the world’s largest natural gas deposit has renewed tensions between the two allies’ end goals in Iran. When the United States and Israel started the war against Iran last month, their messages were perfectly coordinated on the sweeping goal of regime change. President Donald Trump told Iranians to seize their “only chance” for generations to “take over your government,” and Prime Minister Benjamin Netanyahu implored them to “cast off the yoke of this murderous regime.” The comments reflect widespread criticism of President Donald Trump's handling of a war involving Iran, with many attributing the conflict to his impulsive decision-making and alleged manipulation by Israeli Prime Minister Benjamin Netanyahu.

Trump on March 21 threatened to "obliterate" Iran's power plants if Tehran does not fully reopen the Strait of Hormuz within 48 hours, a significant escalation barely a day after he talked about "winding down" the war.

"If Iran doesn't FULLY OPEN, WITHOUT THREAT, the Strait of Hormuz, within 48 HOURS from this exact point in time, the United States of America will hit and obliterate their various POWER PLANTS, STARTING WITH THE BIGGEST ONE FIRST!" Trump said on social media. Trump's ultimatum would expand the scope of U.S. strikes to infrastructure that affects daily civilian life in Iran. Trump and his administration have sent mixed messages about U.S. goals throughout the war, now in its fourth week, leaving US allies struggling to respond. Trump’s ultimatum on March 21 was the most abrupt shift yet. Trump's rhetoric pivoted from a drawdown to an

explicit 48-hour countdown to strike Iran's power infrastructure, even as US Marines and heavy landing craft continue heading to the region.

Iran's largest power plants include the Damavand power plant near Tehran (2,868 megawatts of capacity), the Kerman plant in southeastern Iran (1,910 MW), and the Ramin steam power plant in Khuzestan province (1,890 MW), according to industry and energy databases. The country's sole nuclear plant at Bushehr on Iran's southern coast produces about 1,000 MW. Earlier, Trump raised the idea of destroying Iran's power grid even while downplaying the notion. "We could take apart their electric capacity within one hour, and it would take them 25 years to rebuild," Trump told reporters on March 11. "So ideally, we're not going to be doing that."¹⁵¹

Meanwhile, US voters appeared increasingly concerned that the war could expand. Energy price shocks cause inflation, hitting consumers and businesses hard, a major political liability for Trump as he looked to justify the war to the public before the November elections in which control of Congress was at stake...¹⁵²

The threat of Iranian attacks has kept most ships from getting through the strait, a narrow waterway that serves as the conduit for around a fifth of global oil and liquefied natural gas supplies, threatening a global energy shock. Its near-closure sent European gas prices surging as much as 35% earlier.

Energy prices spiked last week after Iran responded to an Israeli attack on its major gas field by hitting Qatar's Ras Laffan Industrial City, which processes around a fifth of the world's liquefied natural gas, causing damage that will take years to repair. The threats to Gulf infrastructure came as the conflict entered dangerous, unfamiliar territory.

As of March 21, more than 2,000 people have been killed during the war. In Israel, fifteen people have been killed in Iranian strikes.¹⁵³

On March 21, Trump was confronting a crisis that seemed to be slipping out of his hands: Global energy prices are surging, the US stands isolated from allies, and more troops are preparing to deploy despite his promise that the war would be only a "short excursion." A defensive Trump called other NATO countries "cowards" for refusing to help secure the Strait of Hormuz and insisted the campaign was unfolding according to plan. But his declaration on Friday that the battle "was Militarily WON" clashed with the reality of a defiant Iran that is choking off Gulf oil and gas supplies while launching missile strikes across the region.

Meanwhile, the war had also shown that Trump's once-iron grip over his MAGA movement was weakening, with prominent influencers speaking out against the conflict. While his base had mostly stood with him so far, analysts said that Trump's control could weaken in the coming weeks if gas prices kept on rising and US troops were deployed. "As the economics play themselves out," Republican strategist Dave Wilson said, "people will start to say: 'Why am I paying high gas prices again? ... Why is the Strait of Hormuz now deciding whether I can take a vacation next month?'"¹⁵⁴

Since the war's start on February 28, there has been a growing realization within the administration that the conflict and its consequences should have been better mapped out in advance. Trump's biggest misjudgment was over how Iran would respond to a conflict that it considered existential. Tehran had retaliated with its remaining missiles and a fleet of armed drones to offset its military superiority, striking neighboring Gulf states and mostly shutting down the Strait of Hormuz. Whether or not Trump and his aides foresaw the dangers, they have been unable to counter them effectively. As the conflict has dragged on, there have been increasing signs of Trump's frustration with his inability to control the narrative. In recent days, he has torn into the news media, advancing unfounded allegations of "treason" for reporting that he sees as undermining the war effort.¹⁵⁵

On March 21, President Trump posted that Washington was considering "winding down" its military operation against Iran. Trump said the US was close to meeting its goals but insisted that other countries should take the lead in policing the Strait of Hormuz, the shipping lane whose near closure threatens a global energy shock. "We are getting very close to meeting our objectives as we consider winding down our great Military efforts in the Middle East with respect to the Terrorist Regime of Iran," Trump said.

Trump had also accused NATO allies of cowardice over their reluctance to help open the strait. Some allies have said they will consider it, but most say they are reluctant to join a war that Trump started without consulting them.¹⁵⁶

An editorial, "Iran Attacks the Gulf Arabs. Will They Fight Back?" published in the Wall Street Journal on March 20, aptly remarked that:¹⁵⁷

After Iran hit Qatar's Ras Laffan gas hub with ballistic missiles on Wednesday, the Gulf monarchy expelled military attachés at the Iranian embassy. But not the ambassador. He can stay, which raises an uncomfortable question: What would it take for America's Gulf allies to stop hedging their bets? The Gulf Arab caution is, in one sense, understandable. These states are on the front lines of Iran's attacks, and they must live in Tehran's neighborhood after the bombing stops. The U.S. is not always dependable—see Joe Biden's denunciation of the Saudis. The United Arab Emirates joined the Abraham Accords and seemed to be getting targeted for it.

Earlier, President Trump had set a March 23 deadline for Tehran to reopen the strait or face strikes on its power plants. He threatened to "obliterate" Iranian power plants, setting off a cascade of alarm bells around the region, with Tehran saying it would respond in kind. Oil-exporting Gulf countries said Iranian reprisals could further endanger the world economy.

Trump threatened that if Iran does not fully reopen the Strait of Hormuz within 48 hours, the US would act. Iran contended that the US threat raised issues under international law against targeting civilian infrastructure.

Meanwhile, the US ambassador to the UN warned about Iran's potential to launch longer-range ballistic missiles that could hit much of Europe. It comes days after Iran conducted one of its farthest missile launches on record, targeting Diego Garcia, a joint US-U.K. military base in the Indian Ocean. Australia and the UAE became the latest countries to back a joint statement now signed by 22 nations, signaling their readiness to help secure the Strait of Hormuz.¹⁵⁸

Iran said on March 22 it would strike the energy and water systems of its Gulf neighbors in retaliation if U.S. President Trump follows through with a threat delivered a day earlier to hit Iran's electricity grid in 48 hours, escalating the three-week-old war.

The prospect of tit-for-tat strikes on civilian infrastructure could further rattle global markets when they reopen and threaten the livelihoods of millions of civilians in the region who rely exclusively, in some cases, on desalination plants for water.

After more than three weeks of heavy US and Israeli bombardment that US officials say has sharply reduced Iran's missile capabilities, Tehran continued to prove its ability to conduct attacks. Iran fired missiles at Israel while it was itself hit by a wave of US and Israeli strikes.¹⁵⁹ Iranian military spokesperson Zolfaqari said, according to state media.

"If Iran's fuel and energy infrastructure is attacked by the enemy, all energy infrastructure, as well as information technology...and water desalination facilities, belonging to the US and the regime in the region will be targeted pursuant to previous warnings,"

But while electricity attacks could hurt Iran, they would be potentially catastrophic for its Gulf neighbors, which consume around five times as much power per capita. Electricity makes their gleaming desert cities habitable, in part by powering the desalination plants that produce 100% of the water consumed in Bahrain and Qatar. Such plants use seawater to meet more than 80% of drinking water needs in the United Arab Emirates and 50% of the water supply in Saudi Arabia.

Iran's Parliament Speaker Qalibaf doubled down, writing on X that critical infrastructure and energy facilities in the Middle East could be "irreversibly destroyed" should Iranian power plants be attacked.

Iran's IRGC said it would also mean the shipping lane where a fifth of global oil and liquefied natural gas normally transits along Iran's southern coast would remain shut. "The Strait of Hormuz will be completely closed and will not be opened until our destroyed power plants are rebuilt," the Guards said in a statement.

More than 2,000 people have been killed during the war that the U.S. and Israel launched on February 28, which has upended markets, spiked fuel costs, fueled global inflation fears, and convulsed the postwar Western alliance.

On March 21, oil prices ended the day at their highest in four years.

Iranian attacks have effectively closed the Strait of Hormuz, causing the worst oil crisis since the 1970s. Its near-closure sent European gas prices surging by as much as 35%.¹⁶⁰

Meanwhile, the war in Lebanon had been taking place alongside a confrontation on a separate front between Israel and Lebanon's Hezbollah, backed by Iran, with Israel saying its troops had raided several of the armed group's sites in southern Lebanon.

Israeli military spokesperson Brigadier General Defrin said that Israel would continue to hit Iran nonstop and expects "weeks more of fighting against Iran and Hezbollah."

Hezbollah said it had attacked several border areas in northern Israel. Israeli emergency services said one person was killed in a kibbutz near the border. Israel later said it was checking whether the death was caused by Israeli fire.

Hezbollah had fired hundreds of rockets at Israel since it entered the regional war on March 2, prompting an Israeli offensive that has killed more than 1,000 people in Lebanon.

Israel said it had instructed the military to accelerate the demolition of Lebanese homes in "frontline villages" to end threats to Israelis, and to destroy all bridges over Lebanon's Litani River, which it said were used for "terrorist activity".¹⁶¹

In Gaza, there had been regular outbreaks of violence since a ceasefire went into effect in October following two years of devastating war triggered by Hamas-led attacks in Israel in October 2023. Gaza's health ministry says that at least 680 people have been killed by Israeli fire since the October ceasefire. Israel said four soldiers were killed by militants in Gaza in the same period.¹⁶²

Meanwhile, Trump had listed his aims for the war in the Middle East on March 20, as he said the US was considering "winding down" its military efforts. He said the US was getting close to "completely degrading" Iran's missile capability and destroying its defense industrial base. He added that the US wants to end Iran's navy and air force as well as its anti-aircraft weaponry. Trump also said Iran should never be allowed to get close to nuclear capability and that the US would protect its Middle East allies "at the highest level." Meanwhile, US Defense Secretary Hegseth said the US goals had not changed since the war began. He said the goals were to destroy Iran's missile launchers, its defense industrial base, and its navy, and to never allow Iran to get a nuclear weapon.¹⁶³

Meanwhile, major Asian stock markets fell sharply after the US and Iran threatened to intensify hostilities as the war entered its fourth week. Japan's Nikkei 225 was down by 4.8% in early trading, while the Kospi in South Korea was more than 5.5% lower. Oil prices fluctuated, with

Brent crude about 0.8% lower at \$111.25 a barrel, and US-traded oil was broadly flat at \$98.18.¹⁶⁴

Meanwhile, the US was expected to send thousands of soldiers from the US Army's elite 82nd Airborne Division to the Middle East, adding to a massive US military buildup even as President Trump talked about a deal with Tehran to end the war. Before the added forces were sent to the region, there were 50,000 US troops there. News of reinforcements came just a day after Trump postponed threats to bomb Iranian power plants, saying there had been "productive" talks with Iran. But after Trump's Truth Social comment, Iran denied that any talks had been held. The US had conducted strikes against 9,000 targets inside Iran since U.S. and Israeli military operations against Iran started on February 28. Thirteen US troops had been killed so far in the war, and 290 had been wounded.¹⁶⁵

Meanwhile, a Reuters/Ipsos poll found that 35% of Americans approve of the U.S. strikes on Iran, down from 37% in a survey conducted last week. Some 61% disapproved of the strikes, compared to 59% last week.¹⁶⁶

On March 24, Trump sought a month-long ceasefire to discuss the 15-point plan. Trump said on March 25 that the U.S. was in "negotiations" to end the war, which has already killed thousands and created the worst energy shock in history, leading to global fuel shortages and roiling markets.¹⁶⁷

Stocks rose, and oil prices fell on March 25 on reports that the U.S. is seeking a month-long ceasefire and had sent a 15-point plan to Iran for discussion, raising hopes for a resumption of oil exports out of the Persian Gulf.

Trump said the US was talking to "the right people" in Iran to end hostilities, adding the Iranians wanted to reach a deal very badly. Iran's powerful parliament speaker, Mohammad Qalibaf, had dismissed such reports as "fake news."¹⁶⁸

Meanwhile, Iran said it had launched missiles and drones at dawn in an attack on Israel as fighting continued in the region.¹⁶⁹ Two people were killed in the United Arab Emirates by debris from a missile, while Kuwait and Saudi Arabia intercepted missile and drone attacks. Iran signaled it could move to close or control a second key waterway, the Bab al-Mandeb Strait, with the help of Yemen's Houthi rebels. The US had begun to mass ground troops near Iran. Here is what we know about the deployments.¹⁷⁰

Meanwhile, Trump said Iran was eager to reach an agreement to end four weeks of fighting, a claim that contradicted Tehran's position. Iranian officials have said they are reviewing a US proposal but have no intention of entering formal talks to wind down the conflict.

Meanwhile, Iran had launched wave eighty-two of "Operation True Promise 4" and targeted Israel, Al-Azraq airbase, and US bases using missiles and drones.¹⁷¹

Trump said on March 25 that Iranian leaders "are negotiating, by the way, and they want to make a deal so badly, but they're afraid to say it because their own people will kill them. They are also afraid we will kill them".

"We do not intend to negotiate," Araghchi said. "We seek an end to the war on our own terms."

Pakistan had conveyed to Tehran a 15-point American plan to stop the war. Iran officials spared on Pakistan's request. But Iran responded negatively to the plan and said that the war would end only on Tehran's terms, which include guarantees against future attacks. Additionally, Iran has told intermediaries that Lebanon must be included in any ceasefire agreement with the US and Israel.

Meanwhile, Israel was skeptical Iran would agree to the terms, and that it was concerned US negotiators might make concessions. Israel also wants any agreement to preserve its choice to conduct pre-emptive strikes.

Trump has not identified who the US is negotiating with in Iran, with many high-ranking officials among the thousands of people killed across the Middle East since the US and Israel attacked Iran on February 28 and Iran launched strikes against Israel, US bases, and Gulf states.

Meanwhile, Admiral Brad Cooper, head of US Central Command (Centcom), said the US had hit two-thirds of Iran's production facilities for missiles and drones, and drone and missile launch rates were down by 90 percent.

In a video on X, Cooper also estimated that 92 percent of the Iranian navy's largest vessels had been damaged or destroyed. "They've now lost the ability to meaningfully project naval power and influence around the region and around the world," he said.

UN Secretary-General Guterres said the war was "out of control" and had "gone too far." He said that the "world is staring down the barrel of a wider war" in the region. It is time to stop climbing the escalation ladder – and start climbing the diplomatic ladder," Guterres said at the UN headquarters in New York.

Meanwhile, missiles and drones kept striking targets across the Gulf. The Israeli military completed a wide-scale wave of strikes targeting infrastructure in several areas across Iran. The Pentagon is meanwhile planning to send thousands of airborne troops to the Gulf to give Trump more options to order a ground assault, adding to two contingents of Marines already on their way. The first Marine unit, aboard a huge amphibious assault ship, could arrive around the end of the month.

Trump lamented in an all-caps Truth Social post. He wrote: "NATO NATIONS HAVE DONE ABSOLUTELY NOTHING TO HELP WITH THE LUNATIC NATION, NOW MILITARILY DECIMATED, OF IRAN. THE U.S.A. NEEDS NOTHING FROM NATO, BUT "NEVER FORGET" THIS VERY IMPORTANT POINT IN TIME!¹⁷²

The White House warned that President Trump was ready to "unleash hell" if Iran did not accept a peace plan to end the war, but Tehran insisted it would not negotiate. The ramped-up

messages dashed hopes of any imminent de-escalation, with violence on the ground showing no sign of abating after almost four weeks.

China's foreign minister Wang Yi urged dialogue in separate calls with his Turkish and Egyptian counterparts, suggesting that both Tehran and Washington had shown signals they were willing to return to the negotiating table.

"With both the United States and Iran signaling a willingness to negotiate, a glimmer of hope for peace has emerged," Wang told Egyptian Foreign Minister Abdelatty. On March 25, Iran's Foreign Minister Araghchi said that "so far, no negotiations have taken place, and I believe our position is completely principled. Speaking of negotiations, now is an admission of defeat."¹⁷³

Trump insisted on March 25 that Iran was taking part in peace talks. He said that:

"They are negotiating, by the way, and they want to make a deal so badly. But they're afraid to say it because they figure they'll be killed by their own people."

Meanwhile, Turkey had engaged in "intense" diplomatic efforts to end the war by talking to both the US and Iran.¹⁷⁴

On March 25, President Trump said that he wants to avoid a protracted war in Iran and that he hopes to bring the conflict to an end in the coming weeks.

Nearly one month into the war, the president has privately informed advisers he thinks the conflict is in its final stages, urging them to stick to the four-to-six-week timeline he has outlined publicly. White House officials planned a mid-May summit with Chinese leader Xi Jinping in Beijing with the expectation that the war would be concluded before the meeting began.¹⁷⁵

Mediators from Turkey, Egypt, and Pakistan were pushing for a meeting between US and Iranian officials very soon. President Trump and his political allies have expressed enthusiasm for talks.

On March 24, the US sent Iran a 15-point plan to end the war, which centers around earlier Trump administration demands of Tehran. The proposal calls on Iran to dismantle its three main nuclear sites, remove Iran's stocks of highly enriched uranium, halt enrichment, curtail its ballistic missile program, and cut off funding for regional allies.

In return, Iran would have nuclear-related sanctions lifted, and the US would aid the country's civilian nuclear program. The plan broadly reflects the US proposal discussed with Iran before the war started. President Trump had then accused Tehran of not negotiating in good faith. Iran's new, harder-line leadership said it now has higher demands of the US, such as seeking reparations for the weeks of attacks.¹⁷⁶

Meanwhile, in a positive development, on March 26, Israel removed Iranian Foreign Minister Araqchi and Parliamentary Speaker Qalibaf from its hit list after Pakistan urged Washington to press Israel not to target them.¹⁷⁷ Pakistan, Egypt, and Turkey are playing the role of mediators between Tehran and Washington to end the Iran war. Islamabad has kept direct contact with both Washington and Tehran at a time when such channels are frozen for most other countries. Islamabad has also been seen as a venue for peace talks.

Trump has said Iran was desperate to make a deal, while Araqchi said Tehran was reviewing the US proposal but had no intention of holding talks to wind down the conflict.¹⁷⁸

Pakistan's foreign minister had handed a 15-point peace plan to Iran, as it acts as an intermediary between Tehran and the US. Pakistan had functioned as a key intermediary in the current bout of diplomacy between the US and Iran, delivering a 15-point plan proposed by Washington that addresses issues like Tehran's nuclear ambitions and its ballistic missile program. Trump administration officials were working to arrange a meeting in Pakistan this weekend to discuss an off-ramp to the war in Iran.¹⁷⁹

On March 26, Pakistan said Iran was considering the US's proposals in indirect talks, while President Trump said Tehran 'better get serious soon.' The US and Iran were engaged in indirect talks through messages it was relaying, and that Tehran was considering Washington's proposals to end the conflict.¹⁸⁰

President Trump said Iran's leadership "better get serious soon" about talks. Trump, who had said earlier that he wants the war ended in the coming weeks, also said public statements from Iran's leaders were different from their private comments.

Laurence Norman, in his excellent article "The Narrow Path to a U.S.-Iran Deal," said that:¹⁸¹

Both sides will have to scale back demands, but their history points to a way to get it done. The prospects of a diplomatic deal ending the war between the U.S. and Iran look dim right now. But Middle East veterans say there is a pathway for an agreement if the two sides want to engage.

On March 26, Trump said Iran was desperate for a deal to end nearly four weeks of fighting, contradicting the Iranian foreign minister, who said Tehran was reviewing a US proposal but had no intention of holding talks to wind down the war. The conflicting statements came as the economic and humanitarian toll of the war mounted, with fuel shortages spreading worldwide, sending companies and countries scrambling to mitigate the fallout.

Iranian Foreign Minister Araqchi said that while there had been no dialogue or negotiation with the U.S., various messages had been exchanged through intermediaries.

"Messages being conveyed through our friendly countries and us responding by stating our positions or issuing the necessary warnings is not called negotiation or dialogue," Araqchi said.

Trump said Iranian leaders "are negotiating, by the way, and they want to make a deal so badly, but they're afraid to say it because their own people will kill them. They are also afraid we'll kill them".¹⁸²

Even if they happen, any negotiations will prove exceedingly difficult, given the maximalist positions laid out by both sides.

A 15-point U.S. proposal to end the conflict includes demands ranging from dismantling Iran's nuclear program and curbing its missiles to effectively handing over control of the Strait of Hormuz, according to sources and reports.

But Iran has hardened its stance since the war began, demanding guarantees against future military action, compensation for losses, and formal control of the Strait, Iranian sources say. It also told intermediaries that Lebanon must be included in any ceasefire deal, regional sources said.

As the conflict raged on, thousands of people had been killed across the Middle East since the US and Israel attacked Iran on February 28. Iran has since launched strikes against Israel, US bases, and Gulf states.

Israel took Iran's foreign minister Araqchi and parliamentary speaker Mohammad Qalibaf off its hitlist after Pakistan asked Washington not to target them.¹⁸³

Meanwhile, with stock markets weak, gas prices high, and his approval ratings at an all-time low, Trump has strong incentives to find a solution before the conflict escalates further beyond his control, and ahead of the November mid-term elections for Congress. A Reuters/Ipsos poll conducted March 20-23 found 61% of Americans disapproved of Trump.¹⁸⁴

On March 26, US-Israeli strikes on Iran continued as Iranian missiles targeted central and northern Israel. The GCC Secretary-General al-Budaiwi says that Iran's actions, including the attacks and closing the Strait of Hormuz, have "overcome all red lines." The US threatened Iran to accept defeat or be "hit harder" than ever before, as Tehran rejects talks and pledges to continue retaliating.

On March 26, 2026, President Trump issued a warning to Tehran on social media to "get serious soon" on negotiating a deal to end the war. The post comes a day after Trump said a deal to end the war is near, despite Tehran's dismissal of his 15-point ceasefire plan.¹⁸⁵

Israel said on March 26 that it killed Commodore Tangsiri, the head of the IRGC's navy. Israel's Defense Minister, Katz, said Tangsiri had been killed along with other senior naval commanders in a strike overnight.

The secretary-general of a bloc of Gulf Arab countries said that Iran was charging fees for ships to safely transit the Strait of Hormuz. Some ships were paying in Chinese yuan to pass through the Strait.¹⁸⁶

Israeli forces pound Lebanon as Netanyahu said Israel is expanding what he calls a "buffer zone" in southern Lebanon.¹⁸⁷

Meanwhile, the death toll from the war had risen to more than 1,500 people in Iran, 1,100 people in Lebanon, 20 in Israel, and 13 US military members, as well as several civilians on land and sea in the Gulf region. Millions of people in Lebanon and Iran had been displaced.¹⁸⁸

The prospect of tit-for-tat strikes on civilian infrastructure could further rattle global markets and threaten the livelihoods of millions of civilians in the region who rely on electricity to power their cities and supply fresh water. The war had massively disrupted shipping, sending crude oil

prices up around 40%, causing liquefied natural gas prices to spike, and prices for nitrogen-based fertilizers, critical to food production, rose around 50%.

Stock indexes fell sharply on March 26, with Nasdaq dropping more than 2% to confirm a correction, and Brent oil jumped to more than \$105 a barrel as hopes diminished for a quick resolution to the war.

Despite Trump's upbeat assessment, Iran continued to retaliate against U.S. and Israeli strikes by hitting Israel and US bases. It also struck Gulf states and effectively blocked Middle East fuel exports via the Strait of Hormuz, which carries about 20% of global oil and liquefied natural gas.

Trump suggested on March 26 that Iran let 10 oil tankers transit the strait as a goodwill gesture in negotiations, including some Pakistan-flagged vessels. Trump said the US would become Iran's "worst nightmare" if it did not follow US demands, which include opening the Strait of Hormuz and ending its nuclear program. He said taking control of Iran's oil was a possibility, but gave no details.

Earlier, Trump had urged Iranian leaders to negotiate an end to the month-long war or face further assassinations of senior officials amid intensified action by the US and Israel. That threat came as Israel said it had "blown up and eliminated" the IRGC's naval commander, Tangsiri, and several senior officers in a strike on the Iranian port of Bandar Abbas.

Heavy strikes by Israeli or US warplanes were also reported around Isfahan, home to a major Iranian airbase and other military sites, as well as one of the nuclear sites bombed by the US during the 12-day war in June.

Iran has strenuously denied it is "begging to make a deal," as Trump claimed, and continued its retaliatory strikes across a swathe of the Middle East on March 26.

Trump's new threat was among a series of statements made by the US president in which he again criticized Nato allies, described Iran as producing "great negotiators" but "lousy fighters", and repeated his claim that the war he launched last month had already been won.¹⁸⁹

Meanwhile, the US and Israel kept on pounding Iran's missile-launching sites, hitting some repeatedly across a month of war. But Tehran's missiles also keep flying. Iran has shifted to firing from deeper inside its territory with longer-range missiles, military analysts and former U.S. officers said, after airstrikes early in the war inflicted a heavy toll on Iranian bases and truck launchers near the Persian Gulf coastline. Iran is firing far fewer missiles now, down to around a dozen a day, but they have turned them against less-defended targets in Israel and Gulf Arab states, causing greater damage in some cases.¹⁹⁰

Though the US claimed to have destroyed most of Iran's naval capabilities, Tehran has smaller boats capable of laying mines and anti-ship cruise missiles that can be launched from ashore. Either weapon could make the strait impassable for shipping.

On March 27, Yemen's Houthis said that there was "no cause for concern" about the safety of shipping in the Red Sea, and that "at present there is no reason to prevent this trade from continuing". With Hormuz effectively all but closed, crude exports from the Saudi Arabian port

of Yanbu in the Red Sea via an alternate route have surged. The Houthis could potentially try to strike those vessels, further destabilizing wobbling energy markets.

There are fears that if Trump follows through on threats to deploy troops to seize Kharg Island or elsewhere, Tehran may ask the Houthis to strike shipping in the Red Sea, through which about \$1tn worth of goods passed each year before the war. Earlier, Malik al-Houthi, the Houthis' leader, did not say whether the armed rebel group would fight alongside Iran if asked to join the conflict.

Analysts said it was exceedingly difficult to see any immediate pathway to an agreement given the gap between the two sides and the continuing widening of the conflict, which has directly involved more than a dozen countries from Azerbaijan to Oman.

Thousands of US Marines and airborne troops have been sent to the region and could be used to seize Kharg Island, Iran's principal hub for oil exports, or other strategic points in the Gulf. Such a move would mark a significant escalation in the conflict.

Bahreini, Iran's top envoy to UN institutions in Geneva, warned March 26 that any US and Israeli attempt to mount a ground invasion of Iran would be a "big" mistake.

Israel says its invasion of southern Lebanon is aimed at protecting its northern border towns from attacks by Hezbollah and setting up a defensive buffer zone. Eighteen people have been killed in Israel in the war.¹⁹¹

On March 27, President Trump said he would delay a threatened strike on Iran's energy infrastructure and extend his deadline for Tehran to reopen the Strait of Hormuz until April 6, saying talks to end the war are "going very well." The move marks a pullback from Trump's earlier warning that the US would target Iran's energy plants if the crucial shipping lane remained closed. Trump's announcement came after US stocks fell sharply and oil prices rose, as doubt took over again on Wall Street about an end to the war. The S&P 500 slumped 1.7% for its worst day since January and is back on track for a fifth straight losing week. That stretches back to before the Iran war began, and it would be the longest such losing streak in four years. Iran has been blocking ships it sees as tied to the US and Israel from the Strait while allowing limited traffic, and Tehran appears to be charging fees for safe passage.¹⁹²

Meanwhile, Israel has moved thousands of troops across the border into Lebanon, and Israeli forces and Iran-backed Hezbollah militants have been fighting on the ground for at least three weeks. As of March 27, the war has killed more than 1,900 people in Iran, 1,100 in Lebanon, and 13 U.S. military members, as well as several civilians on land and sea in the Gulf region. Eighteen people have died in Israel, while three Israeli soldiers have also been killed in Lebanon. Millions of people in Lebanon and Iran have been displaced.¹⁹³

The US-Israel war of choice is being relentlessly fought with a much-weakened and even beleaguered Iran. Israel wants to destroy Iran completely, even break it into pieces, so that it never challenges it again. Iran has never posed an imminent threat to the US, and therefore, the brazen American attacks on Iran now border on international crimes. The US does not have a war strategy to speak of, and the mercurial nature of President Trump is making it worse. We

are now approaching an American ground operation as the Marines head to the Middle East. Thirteen American service members have already been killed, and more will surely follow. War could have been avoided, but it was not. That is a historic mistake and will prove tragic to the US and the Middle East region. Even now, Trump can declare victory as Iran's nuclear capabilities have been totally vanquished forever. After all, wars are politics by other means, as the strategist Clausewitz says. The US does not have a clear war aim to begin with and has decided not to go for regime change or breakup of Iran, as Israel desires. Therefore, after a few more days of relentless and massive strikes on Iranian military targets, the US can declare "Mission Accomplished" and end the war. But the US faces a dilemma as Iran does not want to end the war, as it seeks revenge for its own losses and destruction. If Russia and China step up their aid, which they might do as an opportunity presents itself for them, which simply cannot be missed, then the war will be prolonged further. For the sake of the millions of helpless people inhabiting the Middle East region, we hope it is otherwise. For the sake of America itself, we hope the war ends soon. Alas, it will not, and that is tragic, to say the least.

The Strait of Hormuz is of great significance, and Iran has the leverage over its adversaries. Al-Hashemi, in his excellent article "The Strait of Hormuz is not just an oil chokepoint," published in Al Jazeera on March 27, 2026, explained that:¹⁹⁴

The Strait of Hormuz... has become the single point where global order faces its greatest vulnerability. Through these waters – 167km (104 miles) long, 39km (24 miles) wide at their narrowest point – pass an estimated 30,000 vessels per year. They carry not only a fifth of the world's seaborne oil and liquified natural gas but also the urea needed for the fertilizers that grow its food, the aluminum that constructs its infrastructure, the helium that cools its semiconductors, and the petrochemicals that sustain its pharmaceutical and manufacturing base. The Strait of Hormuz is not an oil chokepoint. It is the aortic valve of globalized production – and like any valve, when it fails, the entire circulatory system collapses.... The standard characterization of the Strait of Hormuz as an energy corridor is flawed. The transportation of oil and liquefied natural gas accounts for about 60 percent of its regular traffic. Closure inevitably triggers cascading failures across several industries, including agriculture, manufacturing, construction, and semiconductor production. More than 30 percent of the world's trade in ammonia, 50 percent of urea, and 20 percent of diammonium phosphate – all key for the fertilizer and agriculture sectors – are transported through the strait. Some 50 percent of global sulfur, a key part of metal processing, is also exported through this narrow passage. Vessels carrying a third of the world's helium, used in various technologies from semiconductors to MRIs, go through the strait as well. 10 percent of global aluminum and a sizable chunk of plastic produced in the Gulf also pass through. The Strait of Hormuz is also a major thoroughfare for food supplies for Gulf countries, which are highly dependent on food imports. All this data reveals systemic fragility not just in the region, but in the world. Unlike oil, fertilizer cannot be rerouted; there are no pipelines for ammonia or urea. When the strait closes, the nitrogen supply chain simply stops. Synthetic nitrogen fertilizers feed 48 percent of the global population. The mid-April deadline for Northern Hemisphere nitrogen application means disruptions in March translate directly into lower yields in September. Aluminum potlines, once shut down, do not restart quickly – the metal solidifies in the cells, requiring weeks of controlled procedures and incurring substantial added cost. For the more than 100

million people in and around the Gulf, money cannot buy food security when the physical route is closed. Saudi Arabia imports more than 80 percent of its food. Qatar imports 85 percent. The Gulf is wealthy, but it is structurally dependent on a single 39km passage for survival. The stress test. The crisis that began on February 28 is structurally unique. It is the first time the Strait of Hormuz has been closed, and there is a real risk of Bab al-Mandeb (“the Gate of Tears”), a narrow passage on the Red Sea, following suit, if the Houthis choose to add pressure on the global economy in support of their Iranian allies. If that happens, it will mean that two of the world’s three critical maritime chokepoints would be shut down at the same time. The Suez Canal blockage of 2021 was a single-point, six-day disruption. The COVID-19 pandemic was a demand shock. The Ukraine war disrupted specific commodities through specific corridors. The current conflict has shut down the arterial system itself. The problem is not just physical disruption and attacks on vessels. It is also the reaction of the financial system. Within 48 hours of the start of the war, the world’s largest marine insurance mutuals issued cancellation notices for war risk extensions covering the Gulf. By March 5, commercial protection and indemnity cover was non-existent. The result was a phantom blockade, a condition in which legal and financial barriers prevent vessel movement even in the absence of physical obstacles. Even if the strait had been physically clear, no commercial vessel could afford to sail through it. Commodity traders lined up \$7bn in emergency credit to avoid forced liquidation. Letters of credit for Hormuz-dependent cargoes were refused by European banks. This was not a supply disruption. It was a cardiac arrest of commerce. Ports outside the chokepoint became the sole practical alternative. But even the bypass was under fire: Iranian drones struck Oman’s Salalah and Duqm, forcing them to suspend operations. The alternative is being attacked while it is being built. A month into this war, the assumption that the flows of strategic goods through the Strait of Hormuz could be taken for granted – that geographical concentration was a cost optimization rather than a systemic risk – has been exposed as collective strategic myopia. The international community must recognize Hormuz as global critical infrastructure, requiring multilateral security guarantees extending beyond energy, strategic reserves covering fertilizers and metals alongside petroleum, and infrastructure dispersal to reduce the concentration of critical flows in a single 39km passage. The world has now seen what happens when Hormuz fails. The next closure will not be a surprise; it will be a test of whether the system has adapted. A single geographic point, named for a god of order, still holds the power to disrupt it.

Undoubtedly, Iran has gained tremendous leverage by closing the Strait of Hormuz, and the US is trying its best to open it. Trump is making hectic efforts to get allies to make an international force to reopen the Straits.

On March 27, the UAE told the US and other Western allies that it would take part in a multinational maritime task force to reopen the Strait of Hormuz. It was trying to push dozens of countries to create a “Hormuz Security Force” to defend the strait from Iranian attacks and escort shipping. The UAE had faced more Iranian attacks than any other country in the region, including Israel. But several US allies had said they had no immediate plans to send ships to unblock the Strait of Hormuz, rebuffing a Trump request for military support to keep the vital waterway open.

France said on March 26 it had held talks with around 35 countries seeking partners and proposals for a mission to reopen the strait, but only once the US-Israeli war on Iran ends.

Iran had effectively blocked the Strait of Hormuz, spiking energy prices and fueling fears of global inflation.¹⁹⁵

The UAE was also working on a UN Security Council resolution with Bahrain to provide any future task force with a mandate, but Russia and China could oppose the move. UN Security Council members had begun negotiating resolutions to protect commercial shipping in and around the Strait of Hormuz, including a Bahraini draft that would authorize the use of "all necessary means". The UAE may join a US-led effort to protect shipping in the Strait of Hormuz after Iran all but shut the waterway to ships.

The Strait is vital to the economy of the UAE. Iran has repeatedly attacked a UAE port found outside the Gulf that is used to load oil exports. Additionally, on March 27, Kuwait's Shuwaikh port was hit by drones, causing material damage with no injuries reported.¹⁹⁶

Oil prices fell more than 1% on March 27, though that only partially pared the previous day's surge amid growing anxiety that the conflict will last far longer than first thought.

Meanwhile, Brent is up almost 50% since the war began on February 28, while West Texas Intermediate has risen around 40%. Equities struggled following heavy losses on Wall Street. Tokyo and Seoul, which had been the standout performers in the first two months of the year, were among the biggest losers, while Hong Kong, Sydney, Wellington, Taipei, Jakarta, and Manila were also sharply lower. Shanghai and Singapore fluctuated. Investors were also increasingly skeptical about the messaging from the US, with Trump often flipping between threats and talk of peace.

Meanwhile, the World Trade Organization warned the global trading system was experiencing the "worst disruption in the past 80 years", while the World Bank said it was prepared to provide immediate financial aid to emerging market countries.

That came as the Organization for Economic Cooperation and Development warned US inflation could hit more than 4% this year because of the spike in crude prices. That compares with its earlier projection of 2.8%. The prospect of another spike in the cost of living led several Federal Reserve officials to express concern about the outlook for the world's top economy and suggested interest rates were unlikely to come down any time soon.

With the economic impact worsening, governments around the world were being forced to act. Spain approved a sweeping \$5.8 billion package including steep cuts to energy taxes, while Poland's prime minister announced a series of measures to address soaring fuel costs, including reduced taxes and price ceilings. South Korea said it will roll out a \$17 billion "wartime" supplementary budget and expand fuel tax cuts.¹⁹⁷

Meanwhile, disruptions to oil and gas shipments through the Strait of Hormuz have intensified global economic concerns. Airspace closures across the region have also forced airlines to

cancel thousands of flights, marking the largest disruption to global air travel since the COVID-19 pandemic.¹⁹⁸

War can prove to be a disaster for the US as the costs pile up gradually. Already, billions of dollars of highly sophisticated military equipment have been lost or significantly damaged since the U.S. and Israel began striking thousands of targets across Iran more than three weeks ago. Iranian ballistic missiles and drones have caused the bulk of the damage on the ground.

Battle damage and replacement of losses over the first three weeks of the war likely cost roughly \$1.4 billion to \$2.9 billion, according to Elaine McCusker, a top Pentagon budget official during the first Trump administration who has been tracking the cost of the conflict for the American Enterprise Institute. The higher estimate includes damage to a Qatari radar housed on a U.S. air base in the country.¹⁹⁹

The US can only figure out with certainty that it has destroyed about a third of Iran's vast missile arsenal as the U.S. and Israeli war on the country nears its one-month mark.

The status of around another third is less clear, but bombings damaged, destroyed, or buried those missiles in underground tunnels and bunkers. The assessment showed that while most of Iran's missiles are either destroyed or inaccessible, Tehran still has a significant missile inventory and may be able to recover some buried or damaged missiles once fighting stops.

Meanwhile, Trump is weighing whether to escalate the conflict by deploying U.S. troops to Iranian shores along the Strait.

"The problem with the straits is this: let's say we do a great job. We say we got 99% (of their missiles). 1% is unacceptable, because 1% is a missile going into the hull of a ship that costs a billion dollars," Trump said on March 26.²⁰⁰

The Trump administration had said it aimed to weaken Iran's military by sinking its navy, destroying its missile and drone capability, and ensuring that Iran never has a nuclear weapon. Centcom had said its operation, known officially as "Epic Fury", was on schedule or even ahead of plans laid out before the February 28 start of the US and Israeli attacks on Iran.

US strikes had hit more than 10,000 Iranian military targets and, according to Centcom, had sunk 92 percent of the Iranian navy's large vessels. The US military had published imagery showing attacks on the factories that produce Iran's weaponry and had stressed that it is not just pursuing missile and drone stockpiles, but the industry that makes them. Still, Centcom had declined to say precisely how much of Iran's missile or drone capability has been destroyed. Part of the problem was figuring out how many Iranian missiles were stockpiled in underground bunkers before the war started. The US had not shown its estimate of the size of Iran's pre-war missile stockpile. Israeli military officials said Iran had 2,500 ballistic missiles capable of reaching Israel before the war. Over 335 missile launchers had been "neutralized", being 70% of Iran's launch capacity. Israeli officials had not publicly shown how many actual missiles they believe Iran still owns.²⁰¹

Despite the heavy pace of US strikes, Iran had shown that it had not run out of weapons.

The Trump administration may have overstated how much US strikes have degraded Iranian capabilities. Iran can continue to conduct strikes from the Bid Kaneh military facility, which has been heavily bombed. Iran has managed to sustain this, showing the U.S. was overstating the success of its operation. Iran kept about 30 percent of its missile capabilities. It had more than a dozen large underground facilities where it has been able to keep launchers and missiles. Hegseth acknowledged the challenge posed by Iran's tunneling in remarks on March 19, saying, "Iran is a vast country. And just like Hamas and their tunnels (in Gaza), they've poured any aid, any economic development, humanitarian aid, into tunnels and rockets."

"But we are hunting them down methodically, ruthlessly and overwhelmingly, as no other military in the world can do, and the results speak for themselves," he said, without providing details on the percentage of missiles or drones destroyed.²⁰²

Rubio discussed with G7 foreign ministers the possibility that Iran, even after the conflict ends, could try to impose shipping tolls through the Strait of Hormuz. Rubio said European and Asian countries that receive help from trade through the waterway should contribute to efforts to secure free passage.²⁰³

Meanwhile, more than 1,900 people have been killed and at least 20,000 injured in Iran. Attacks on Israel by Iran's Lebanese ally Hezbollah have also prompted an Israeli onslaught that has displaced a fifth of Lebanon's population.

Yemen's Houthis said they were ready to intervene militarily under certain conditions, including if new allies join the US and Israel in their war against Iran or if the Red Sea is used to launch attacks on Iran.²⁰⁴

The US, which has set out to neutralize Iran's long-range strike capabilities, can only confirm that about a third of the country's missile arsenal has been destroyed. As the damage mounts and with no end in sight, Gulf Arab states are telling the U.S. that any deal must not merely end the war but also permanently curb Iran's missile and drone capabilities, and ensure global energy supplies are never again weaponized. Crude prices swing with global crises, geopolitical tensions, supply shocks, and economic cycles. Stock markets continued their slide on Friday, while the Brent crude oil benchmark topped \$112, having risen more than 50% since the war began. In the US, fuel prices are rising; diesel in California hit an all-time high at an average of \$7.17 a gallon. Long-term oil prices have risen sharply since the start of the Iran war.²⁰⁵

Patrick Wintour, in his excellent article "A war of regression: how Trump bombed the US into a worse position with Iran," The Guardian, March 28, 2026, said:²⁰⁶

Four weeks into a war that was going to take four days, and that has so far cost the US about \$30-40bn and Israel \$300m a day, Washington is further away from a diplomatic agreement with Iran than it was in May 2025. Not only has the war failed to persuade Iran to agree to dismantle its nuclear program comprehensively and irreversibly the US demanded in a 15-point paper that it tabled on 23 May last year, Washington is now having to negotiate to reopen the strait of Hormuz, a strategic waterway that has been open ever since the invention of

the dhow, with a short exception of a tanker war in the 1980s between Iran and Iraq. This regression is proving to be perplexing for the American high command. Pete Hegseth, the Secretary of Defense, recently said that “the only thing prohibiting transit in the strait right now is Iran shooting at shipping,” but this was not right. Iran has not been shooting at shipping that much in recent weeks. Instead, it is the fear of Iran shooting at shipping that is scaring off insurers and tanker owners. Still worse from the US perspective, Iran has set up a waterside stall whereby prime ministers and tanker owners can bargain with the Iranian navy over the toll they are willing to pay for their tankers to be given “free passage.” Iran plans to turn the strait into a money spinner, just as Egypt charges for access to the Suez Canal. By some calculations, given the massive scale of the traffic that passes through the strait each year, Iran could raise \$80bn a year. If a law currently being rushed through the Iranian parliament passes, tankers carrying oil from favored non-hostile nations such as India, Japan, Pakistan, South Korea, and China will be waved through or offered cheaper rates. Little wonder Trump is thrashing around. The US, along with Israel, continues to bomb Iran, but it has now twice pushed back the date of threatened strikes on Iran’s civilian power stations – an action that would make up a war crime. He continues to insist Iran has been defeated, and yet Iran continues to behave as if it is not. That is partly because this struggle is not just being fought in command posts, but on the trading floor. The price of oil is the key metric for Iran’s success, along with its remaining supply of missile launchers. As a result, 95% of traffic through the Strait of Hormuz is still blocked, depriving the markets of 10-13 million barrels of oil each day. Such is Iran’s stranglehold that even Trump describes Iran allowing ships through as a “present” to the US.... For Iran, oil trading anything above \$100 a barrel is pitched high enough to destroy demand and disrupt the world economy. But it is not just oil. The strait provides passage for chemicals, helium, metals, and fertilizers. As during the COVID pandemic, the world is discovering something new about the interconnectedness of supply chains and how geography has blessed Iran with a unique chance to break these chains.... Domestic politics in the US is also becoming ominous. Curt Mills, the executive director of the American Conservative, says: “Trump’s legacy is at stake in Iran: if the war drags on, that will be all that will be remembered of his second term. George W Bush also did not want to be a war president: he had goals about education, immigration, and social welfare. None of this was conducted; his record was crushed by the war in Iraq.” Americans, including Republicans, want this war to end, adding to the pressure on Trump to prove that sending 10,000 troops to the Middle East would not be the definition of a strategic quagmire. Inside the Iranian regime, where survival was the aim, there is a growing sense that the balance is tilting in their favor, so much so that Iran may indeed overplay the weak hand to which Younger referred. The Iranian media, for instance, is repeatedly picking up stories from Western thinkers and retired generals claiming Trump’s strategy has failed. The speaker of the parliament, and Trump’s preferred leader, Mohammad Bagher Ghalibaf, is clear: US soldiers will only find they cannot fix what their generals have broken. Philip Gordon, a former foreign policy adviser to Kamala Harris when she was US vice-president, thinks “there is no chance Iran will agree to Trump’s demands, and the longer the US holds out for them, the more costs and pain everyone will endure. In the short term at least, limits on Iran’s nuclear program, ballistic missiles, support for proxies, and threat to the strait are all more likely to be ensured through deterrence and prevention than with a comprehensive, formal agreement, and the sooner we recognize that, the better off we will be.” The former head of the Iran desk at Israel’s military

intelligence, Danny Citrinowicz, also predicted that by the expiry of Trump's latest 10-day deadline, Iran would not surrender, would not accept the 15-point framework, would not relinquish control of Hormuz, and would continue attacks on Israel and the Gulf states. After that, Trump will face a decisive choice: a further escalation of tensions, a retreat, or a push for a negotiated settlement like the one Iran offered in March. The UN is not going to sanction the use of force to reopen the strait, Europe will not participate, and the G7 will not endorse it...Trump wants to avoid a long, protracted war of attrition, so the Pentagon is giving him high-risk, high-investment options with potential high impact, as if one big blow will change the trajectory of the war, or at least the perception of it – i.e., that Iran retains strategic leverage by having identified and developed control over the center of gravity of the war, Hormuz.

Trump said on March 27 that: "We would have always been there for them, but now, based on their actions, I guess we don't have to be, do we?" "Why would we be there for them if they're not there for us? They weren't there for us." He urged Iran to make a deal to end US and Israeli bombing or face more strikes on its country. According to the poll, 88% of respondents believe the US is using military coercion and maximum pressure against Iran during negotiations. Meanwhile, 94.2% believe the US-Israeli strikes against Iran have further destabilized the situation in the Middle East. "They now have the chance, which is Iran, to permanently abandon their nuclear ambitions and to join a new path forward," Trump said. "We'll see if they want to do it. If they don't, we're their worst nightmare. In the meantime, we'll just keep blowing them away." He further said that Iranians were talking with the US and described them as desperate to make a deal, characterizations Tehran has denied.

Trump suggested that a deal might not come together. "I don't know if we'll be able to do that," he said of the prospects for a deal. I don't know if we're willing to do that."²⁰⁷

On March 27, Trump said he was "very disappointed" with NATO's response to the war with Iran. He said, "I've always said NATO is a paper tiger. And I always said we help NATO, but they'll never help us." Rubio said the US can achieve its war goals "without any ground troops," and the end of the war is "weeks, not months away".²⁰⁸

Meanwhile, Turkish Foreign Minister Fidan said he will meet with Egyptian, Saudi, and Pakistani counterparts in Pakistan over the weekend to discuss the US-Israel war on Iran. Lebanon's Ministry of Health says 1,142 people have been killed and 3,315 injured in Israeli attacks across the country since March 2.²⁰⁹

The war had now widened with the first attack from Yemen. On March 28, Yemen's Iran-aligned Houthis launched missiles at Israel, their first such attack since the Iran war began. The ballistic missile attack that was intercepted by Israel targeted Israeli military sites found in the south of the occupied West Bank.

The Houthis, whose involvement risks broadening and prolonging a war that has entered its fifth week, said their operations would continue until the "aggression" on all fronts ended. Israel said it had intercepted a missile from Yemen.

The Houthis had said on March 27 that they were prepared to act if what the group called an escalation against Iran and the "Axis of Resistance" continued in the war. The group has shown an ability to strike targets far beyond Yemen and disrupt shipping lanes around the Arabian Peninsula and the Red Sea, as they did in support of Hamas in Gaza after October 7, 2023.

If the Houthis open a new front in the conflict, one obvious target would be the Bab al-Mandab Strait off the coast of Yemen, a key shipping choke point that controls sea traffic towards the Suez Canal, after Iran effectively shut the critical Strait of Hormuz.²¹⁰

Speaking on March 27 before the Houthi attack, Rubio said Washington was "on or ahead of schedule" and expects to conclude military operations in "weeks, not months". He also told Group of Seven counterparts in France that European and Asian countries that receive help from trade through the Strait of Hormuz should contribute to efforts to secure free passage.²¹¹

The war has driven a wedge between the US and its traditional allies, who have stayed on the sidelines. Trump said this lack of support had implications for NATO, the West's most important alliance. On March 27, Trump said, "We would have always been there for them, but now, based on their actions, I guess we don't have to be, do we?" "Why would we be there for them if they're not there for us? They weren't there for us."

The charter underlying NATO, which has long been led by the US, says an attack on one member is an attack on all, requiring them to support each other.

Rubio said the US could achieve its aims without ground troops but acknowledged it was deploying some to the region "to give the president maximum optionality and maximum opportunity to adjust the contingencies, should they emerge". Washington has dispatched two contingents of thousands of Marines to the region, the first of which is due to arrive in the coming days on a huge amphibious assault ship. The Pentagon is also expected to deploy thousands of elite airborne soldiers.²¹²

Meanwhile, 1,142 people have been killed and 3,315 injured in Israeli attacks across Lebanon since March 2.²¹³

Iranian President Pezeshkian warned on March 28 that if regional neighbors desired "development and security", they should not allow "enemies to run the war" from their territory. He said: "We have said many times that Iran doesn't carry out preemptive attacks, but we will retaliate strongly if our infrastructure or economic centers are targeted." "To the countries of the region: If you want development and security, don't let our enemies run the war from your lands."

His comments come amid US-Israeli strikes on Iran, as at least five people were killed and seven injured after a US-Israeli attack on a residential unit in Iran's northwestern city of Zanjan. Iran has retaliated against US bases in the region, Bahrain's military has said it has so far intercepted and destroyed 174 Iranian missiles and 385 drones since the beginning of the US-Israeli war.²¹⁴

Around 10 US service members were injured in an Iranian attack on Prince Sultan Air Base in Saudi Arabia on March 28. At least two of the injured had shrapnel wounds considered non-life-threatening, and others were "impacted," though the nature of what happened to them was not at once clear. A refueling plane was also damaged. The Islamic Resistance in Iraq, a group of Iran-backed armed factions, attacked "several" air bases and an airport in Jordan. The attack comes as Israel said it was attacking Tehran and "defending" against missiles fired from Iran on March 28. Iranian retaliation on an air base in Saudi Arabia wounded 12 US military personnel, two seriously, as drones and missiles continued to strike US bases around the Gulf. Additionally, Kuwait International Airport was targeted by multiple drone attacks that caused considerable damage to its radar system but resulted in no casualties. Beirut's southern suburbs were struck again on March 28. Israel is pushing its ground invasion from three different fronts; however, it is facing "fierce resistance" from Hezbollah fighters. At least five people were killed, and seven were injured after a US-Israeli attack on a residential unit in Iran's northwestern city of Zanjan. A university in Tehran was also struck. Israel's military said on March 28 that it had detected incoming missiles from Iran, and Syrian state television reported explosions heard above the capital Damascus, from Israeli intercepts of the Iranian missiles. The UAE and Bahrain also reported missile attacks on March 28.²¹⁵

Iranian Foreign Minister Araqchi said on X that Israel, in coordination with the US, had also hit two steel factories and a power plant. "Attack contradicts POTUS extended deadline for diplomacy. Iran will exact a heavy price for Israeli crimes," Araqchi said on March 27, using an acronym for the president of the US. He has warned that Tehran would exact a "heavy price" for what he described as Israeli attacks on key industrial and nuclear infrastructure, as hostilities between the two sides intensified. In a social media post, Araqchi said Israel had struck two of Iran's largest steel factories, a power plant, and civilian nuclear facilities, adding that Israel claimed the operation was conducted in coordination with the US. Iran's IRGC echoed the warning, urging workers at industrial sites with American ties or links to Israel to "leave their workplaces immediately," signaling the possibility of further retaliatory strikes. US-Israeli strikes earlier in the day hit two Iranian nuclear facilities, the Khondab heavy water complex and a uranium processing plant in Ardakan, along with two major steel plants. Israeli forces confirmed the attacks, while Iranian authorities said there had been no radioactive release. Israel's military said Iran responded by firing missiles, with one person killed in Tel Aviv and at least four others wounded. Meanwhile, the US has dispatched two contingents of thousands of Marines to the region, the first of which is due to arrive in the coming days aboard a large amphibious assault ship. The Pentagon is also expected to deploy thousands of elite airborne soldiers. The deployments have raised concerns that the war will turn into a prolonged ground battle. Stock markets tumbled sharply on March 27 while the Brent crude oil benchmark LCOc1 topped \$112, having risen more than 50% since the war began.²¹⁶

A month after the US and Israel launched strikes on Iran, the war had spread across the Middle East, killing thousands of civilians, mostly in Iran and Lebanon, and causing the biggest disruption ever to energy supplies, hitting the global economy and fueling inflation fears. Iran's response, striking US and Israeli targets in the region as well as civilian targets in Gulf Arab nations and shipping, had disrupted global trade in energy and other commodities, raising fears of rising prices and recession.

A global survey launched by CGTN shows that 89.6% of respondents believe the Iran conflict has left the US increasingly isolated in the international community. The survey was released across CGTN's English, Spanish, French, Arabic, and Russian platforms. Within 24 hours, 13,731 netizens took part in the poll and shared their views. According to Kolivand, Iran's deputy permanent representative to the International Maritime Organization (IMO), more than 1,700 people have been killed, 22,800 injured, around 3.5 million displaced, and over 81,000 civilian facilities damaged or destroyed in Iran since the start of US and Israeli attacks. In the poll, 92.4% of respondents agreed that the US-Israeli military operations have seriously violated international law and the basic norms of international relations.

The war has driven a wedge between the US and its traditional allies, who have stayed on the sidelines. President Trump said this lack of support had implications for NATO, the West's most important alliance. The survey finds that 88.2% of respondents believe the Iran conflict has widened divisions between the US and its traditional allies.²¹⁷

The trajectory of the war is still as unclear as the aims of starting one in the first place. Its spillover effects are immense with rising oil costs indefinitely.

In the US, Trump is politically vulnerable to economic downturns. Trump has appeared eager to wind down the unpopular war, emphasizing this week what he called productive negotiations aimed at a diplomatic solution - despite repeated assertions from Tehran that no such talks have begun. Many countries around the world are actively pushing for mediation, and 72.3% of respondents approve of these efforts, believing they serve the interests of the countries concerned and echo the shared aspirations of the international community.²¹⁸

Earlier, Trump and his administration had sent mixed messages about US goals throughout the war, now entering its fourth week, leaving traditional US allies struggling to respond. Surprisingly, the US does not have a coherent war strategy, the consequences of which can now prove disastrous for it. Subsequently, the entire region can suffer even more. The economic fallout of the Iran war is now causing great concern all over the world. Even if the conflict does stop soon, there will be no rapid recovery from the upheaval caused by airstrikes and Iran's virtual closure of the Strait of Hormuz.

American voters appear increasingly concerned about signs that the war could expand. On March 29, US Representative Mace, a Republican, said Congress should have a say in any decisions to deploy troops to Iran, further underscoring division within Trump's political party.

Mace's comments came days after she appeared from a classified House of Representatives briefing on the war, saying it had raised concerns over the administration's plans.

They also came on the same day the Washington Post reported the Pentagon was preparing for limited ground operations in Iran, including raids on Kharg Island and sites near the Strait of Hormuz.

"If we're going to do a conventional ground operation with Marines and 82nd Airborne, which is a ground war that I believe Congress should have a say and we should be briefed," Mace said.

“We don’t want troops on the ground,” Mace added. “I think that’s a line for a lot of people. If we’re going to do that, then come to Congress and get the proper authorities to do so.”²¹⁹

Trump has so far not officially supported deploying US troops to Iran, but has claimed that all options are still on the table. He has broadly claimed success in the month since the US and Israel launched the war, but his endgame and final timeline for the conflict have still been unclear.

Military analysts and Trump’s own director of national intelligence have said that while Iran’s military capabilities have been diminished in the fighting, the country keeps the ability to inflict damage on the region and to potentially rebuild.

Many experts have also pointed to the limits of using air power alone in fully degrading Iran’s military capabilities, destroying its nuclear program, or achieving more comprehensive regime change.

In a statement on May 29, White House press secretary Leavitt did not deny the Washington Post’s report, but said the Pentagon regularly prepares a range of options for the president to review.

“It’s the job of the Pentagon to prepare to give the commander-in-chief maximum optionality. It does not mean the president has decided,” Leavitt said.

Deploying boots on the ground has been a major political Rubicon for Trump, who has long favored swift and finite military action abroad in what he calls an “America First” strategy.

The decision would also be a major gut check for Republican lawmakers, who have thrown their support behind Trump even as influential figures in his “Make America Great Again” (MAGA) movement have condemned the war.

That was on display at the Conservative Political Action Conference (CPAC) gathering held in Dallas, Texas over the weekend, where several speakers cheered the war or avoided the issue altogether.

However, former member of Congress and Trump ally Gaetz directly decried any ground invasion.

“A ground invasion of Iran will make our country poorer and less safe,” he said. “It will mean higher gas prices, higher food prices, and I’m not sure we would end up killing more terrorists than we would create.”

Earlier, Representatives Crane and Raden, both Republicans and former members of the military, also said their support for the war would shift if Trump deployed troops.

“My biggest concern this whole time is that this would turn into another long Middle Eastern war,” Crane said. “Though I don’t want to try and take away any of the president’s ability to carry out this operation, I know a lot of our supporters and a lot of members of Congress are very concerned,” he said.²²⁰

Meanwhile, energy price shocks were rising and hitting consumers hard, which was a major political liability for Trump as he sought to justify the war to the US public before the November elections, in which he could lose control of Congress.

The Pentagon was developing options for a final blow in Iran that could include a massive bombing campaign and the use of ground forces. There could be an occupation of Kharg Island by American marine forces and Israeli troops. Another possibility was invading Larak, an island that helps Iran control the Strait of Hormuz, as it has radars that check movements in the strait. Yes, another possibility was occupying the strategic island of Abu Musa and two smaller islands that lie near the western entrance to the strait. These islands were controlled by Iran but also claimed by the UAE. Finally, the US could block or seize ships that were exporting Iranian oil on the eastern side of the Hormuz Strait. Most probably, military action to achieve all or some of the aims was going to happen very soon. America was then on its way to the classic mission creep phenomenon, which was a huge mistake. Finally, much later, the US decided on a naval blockade on the eastern side of the strait, as planned earlier.

On March 29, several hundred US Special Operations forces had arrived in the Middle East, joining thousands of Marines and Army paratroopers in a deployment meant to give Trump more options to expand war with Iran. The newly arrived commandos, who include Army Rangers and Navy SEALs, have not been assigned specific missions. But as specialized ground troops, they could be deployed to help safeguard the Strait of Hormuz. Or they could be deployed as part of a mission to try to seize Kharg Island. Alternatively, they could be used in a mission aimed at Iran's highly enriched uranium at the Isfahan nuclear site.²²¹

The commandos join 2,500 Marines and another 2,500 sailors, who recently arrived in the region. Altogether, there are more than 50,000 American troops in the Middle East now, 10,000 more than usual, as Trump decides on his next step in the war. He was weighing how to try to open the strait.

Usually, there are around 40,000 American troops scattered among bases and on ships at any time around the region, including in Saudi Arabia, Bahrain, Iraq, Syria, Jordan, Qatar, the UAE, and Kuwait. But as Trump has escalated the war in Iran, that number has reached more than 50,000.

The number of troops no longer includes the 4,500 aboard the aircraft carrier Gerald R. Ford, however. That ship has been hobbled by constant mishaps, including a fire that broke out in the laundry. Ford withdrew from the region on March 23.²²²

Earlier, the Pentagon also ordered about 2,000 soldiers from the Army's 82nd Airborne Division to the Middle East to give Mr. Trump added military options.

The location of the Army paratroopers is not public, the military official said. But they will be within striking distance of Iran. The paratroopers could also be used on Kharg Island, where U.S. warplanes bombed more than 90 military targets earlier this month. Or they could be deployed for other ground operations in conjunction with the Marines.

But military experts caution that even 50,000 troops, many of them at sea, are a small number for any kind of major land operation. Israel used more than 300,000 troops for its operations in the Gaza Strip that began in October 2023. The U.S.-led coalition that invaded Iraq in 2003 was close to 250,000 at the beginning.

At almost a third the size of the continental United States, Iran has around 93 million people. Taking, let alone holding, a country of its size and complexity and weaponry with 50,000 troops is not doable, military experts say.²²³

On March 29, as US troops arrived in the Middle East, Iran said it would destroy US forces if the military launched a ground invasion. Iran had launched a campaign to recruit volunteers to fight American forces. President Trump was weighing a military operation to extract 1,000 pounds of uranium from Iran, a complex and risky mission that would put American forces inside the country for days or longer. Trump had not decided on whether to give the order, as he was considering the danger to US troops. But the president stayed open to the idea, because it could help achieve his central goal of preventing Iran from ever making a nuclear weapon.²²⁴

The US was now considering landing on Iran's shore or its Kharg Island oil export hub. The US plan was creating enormous tensions in the entire region.

On March 30, oil rose on fears of a widening war that could lead to more supply disruptions as the war in Iran entered a second month. Meanwhile, more than a month into the war, here are some numbers: 3,000 people have been killed, 4 million have been displaced, and oil prices have surged by 50%.²²⁵

Meanwhile, Iranians feared that President Trump was only stalling, just using the peace negotiations for the planned invasion. That is highly unlikely now, as it would be a grave mistake. It would lead to unintended consequences that would hurt the US itself and the region also.

All wars are politics by other means, as Clausewitz declared a long time ago, and this war is no exception. The problem for the US is that the Trump administration does not have a war strategy. Israel manipulated it to fight its war with Iran. There was no immediate and imminent threat to the US before the war began a month ago. Trump must know that any use of US ground troops, even for a limited mission, would pose significant political risks for him, given low American public support for the Iran campaign and Trump's own pre-election promises to avoid entangling the US in new Middle East conflicts. Thus, when the Trump administration commits the folly of sending ground troops to the Persian Gulf islands, it will have to pay a prohibitive cost for the blunder.

With global energy prices up and his job approval ratings down, US President Donald Trump faces stark choices after a month of war against Iran: cut a potentially flawed deal and get out,

or escalate militarily and risk a prolonged conflict that could consume his presidency. Despite a flurry of diplomatic activity, Trump ends another week of the joint US-Israeli campaign struggling to contain a widening Middle East crisis as a defiant Iran maintains a chokehold on Gulf oil and gas shipments and continues missile and drone strikes across the region. The central question now, say analysts, is whether Trump is ready to wind down or ramp up what critics have called a war of choice, one that has ignited the worst global energy supply shock in history and spread far beyond the region. Trump had said that he wants to avoid a “forever war” and find a negotiated exit, urging them to stress the four-to-six-week duration of hostilities he has outlined publicly. At the same time, Trump has threatened a major military escalation if talks fail. Trump’s diplomatic overtures to Iran, including a 15-point peace proposal sent via a backchannel with Pakistan, appeared to show an increasingly urgent search for an off-ramp. But it is still unclear whether there are currently any realistic prospects for fruitful negotiations. Trump has poor options all around to end the war. Part of the challenge is the lack of clarity related to what a satisfactory outcome would be. ²²⁶

Apparently hedging his bets, Trump is deploying thousands more US troops to the region and warning Iran of an intensified onslaught, including the use of ground troops, if it does not yield to his demands. Such a show of force could be aimed at creating leverage for concessions from Tehran, but risks drawing the US into a more protracted conflict, with any commitment of boots on Iranian soil likely to anger many American voters. Another possible scenario, experts say, would be for the US to wage a final major air assault in "Operation Epic Fury" to further degrade Iran’s military capabilities and nuclear sites, after which Trump would declare victory and walk away, saying his war objectives had been achieved. But such a claim would ring hollow unless the vital Strait of Hormuz is completely reopened, which Iran is so far refusing to allow. Trump has voiced frustration over European allies' refusal to send warships to help secure the waterway. Trump, who has repeatedly vowed to keep the US out of foreign conflicts, is struggling to hold the expanding war that he started along with Israel. Even as he has continued issuing triumphalist assessments, he has increasingly geared his messaging to reassuring nervous financial markets, emphasizing that the war will be over soon. But the lack of a clear withdrawal plan carries dangers both for Trump’s presidential legacy and his party's prospects as Republicans scramble to defend narrow majorities in Congress in the November midterm elections. Trump’s biggest miscalculation has been the extent of Tehran's retaliation²²⁷.... The Iranian government’s bet is they can take more pain for longer than their adversaries, and they might be right.... For now, however, the diplomatic path offers no easy solutions.... Israeli officials, meanwhile, have signaled unease that Trump might make concessions that could tie their hands in further strikes against Iran. Washington’s Gulf allies may also resent a hasty US exit, given they could be left with a wounded, hostile neighbor.... ...For now, Trump is keeping the world guessing, one moment making pronouncements aimed at soothing volatile markets and in the next issuing threats that spike energy prices. Trump traffics in contradictory signals.... He is a one-man ‘fog of war’ messaging machine to keep opponents off-balance.²²⁸

Meanwhile, Trump faced concerns from within the Republican Party. Senior Republican lawmakers on March 29 deflected concerns from members of their own party about President

Trump waging war with Iran without engaging lawmakers or seeking their authorization, and instead highlighted what they said was the success of the continued operations. Senator Tom Cotton of Arkansas, the chairman of the Intelligence Committee, said that the administration is “on time or ahead of schedule for every single line of effort” in the military campaign, and that the administration’s “endgame” is for Tehran to be “defanged and neutered.” Representative Steve Scalise of Louisiana, the No. 2 House Republican, said that the military campaign “has been successful in achieving its objectives.” Neither lawmaker knew how long the war might continue nor if the president planned to deploy American ground troops.²²⁹

Meanwhile, diplomacy and peace talks continued. Earlier, a 15-point US proposal had been conveyed to Tehran by Pakistan. It had been reviewed in detail by Iran by senior Iranian officials and the representative of Iran's supreme leader, who felt it served only US and Israeli interests. The proposal included demands ranging from dismantling Iran's nuclear program to curbing its missiles and effectively handing over control of the strait. Dar, Pakistan's foreign minister, said "indirect talks" between the US and Iran were taking place through messages relayed by Islamabad, with other states, including Turkey and Egypt, also supporting mediation efforts.²³⁰

Pakistan had now appeared as a key intermediary between Iran and the US, trying to secure talks to end the war. On March 26, Dar confirmed Pakistan’s involvement. Pakistan had strong credentials as the only country in the region enjoying good relations with the US and Iran. Concurrently, it enjoyed strategic relations with Saudi Arabia, the Gulf states, and Türkiye.²³¹

Pakistan had avoided taking sides and tried instead to keep stable relations with all parties. Prime Minister Sharif condemned both the US-Israeli strikes that killed Iran’s supreme leader, Ayatollah Ali Khamenei, and Tehran’s retaliation against its neighbors. He and Dar have both been busy, talking to senior Iranian government ministers and regional leaders.

Pakistan shares a 900-kilometre border in its southwest with Iran, and deep historical, cultural, and religious links. Iran was the first country to recognize Pakistan after its independence in 1947. Pakistan returned the favor for the Islamic Republic after the 1979 revolution. They cooperated against Moscow during the Soviet occupation of Afghanistan. Pakistan also has some Iranian diplomatic interests in Washington, where Tehran has no embassy. And it is home to the world’s second-biggest Shia Muslim population after Iran.

Pakistan’s strongman, Field Marshal Munir, has built up a personal rapport with Trump and spoke to him earlier. Shehbaz praised Trump’s “bold and visionary” intervention, while Field Marshal Munir said the US leader deserved the Nobel Peace Prize for stopping an escalation between the nuclear-armed neighbors. On Iran, Trump said Pakistan knows the country “better than most.” Personal relations have long helped boost bilateral ties shaped by shifting strategic interests.

Pakistan and Saudi Arabia signed a strategic mutual defense agreement in 2025. Pakistan has kept Riyadh on side, and the prime minister recently visited for talks with Crown Prince Mohammed bin Salman.²³²

Sharif, on March 28, held a telephone conversation with Iranian President Pezeshkian, as Islamabad has stepped up its diplomatic efforts to de-escalate rising tensions in the Middle East and position itself as a key mediator. Sharif briefed the Iranian president on Pakistan's ongoing diplomatic outreach, which includes engagements with the US as well as "brotherly" Gulf and Islamic countries. The efforts, he said, are aimed at creating a conducive environment for dialogue and eventual peace talks. He also highlighted what Islamabad sees as growing international endorsement of its peace initiative, expressing hope that collective efforts could help chart a practical path toward ending the conflict. President Pezeshkian, while appreciating Pakistan's diplomatic role, shared Tehran's perspective on the hostilities and underscored the importance of trust-building as a prerequisite for meaningful negotiations. He praised Islamabad's efforts and its supportive stance in pursuit of regional peace. The prime minister, in response, reaffirmed Pakistan's commitment to playing a constructive role in promoting stability and easing dialogue.²³³

Earlier, Prime Minister Sharif publicly offered Pakistan as a venue for US-Iran peace talks, an offer that received an extraordinary boost when Trump reposted it on his Truth Social platform, a move widely seen in Pakistan as the US's tacit endorsement of the country's emerging role as a mediator. Earlier, Dar confirmed that indirect communication between the US and Iran was underway through messages being relayed by Pakistan, with Turkey and Egypt also helping diplomatic efforts aimed at easing the tensions in the Middle East. Pakistan continued to call for the de-escalation of the conflict.²³⁴

The back-to-back diplomatic engagements highlight Pakistan's emerging role at the center of efforts aimed at reducing tensions in the Middle East, with Islamabad looking to leverage its ties with multiple stakeholders to help dialogue between rival sides.²³⁵

Pakistan hosted Saudi Arabia, Turkey, and Egypt for talks on March 29 on the Iran war as Islamabad positioned itself as a potential venue for US-Iran negotiations on the month-old conflict. Saudi Foreign Minister Al Saud, Turkish Foreign Minister Fidan, and Egyptian Foreign Minister Abdelatty held in-depth discussions with Pakistani leadership on a range of issues, including efforts to de-escalate regional tensions. The four nations had been involved in trying to mediate between Washington and Tehran in the war, and all were acutely vulnerable to threats to energy supplies and trade routes. Earlier, Pakistan has conveyed to Tehran a US proposal for ending the war and offered to host talks. Trump had said talks with Iran were going "very well," but Tehran denied talking with Washington. Earlier, Iran had reviewed the US proposal, although one official had dismissed it as "one-sided and unfair". Its demands ranged from dismantling Iran's nuclear program to curbing its missile development and effectively handing over control of the Strait of Hormuz. Earlier, Turkey's Fidan said on March 28 that the world's new "polycentric system" requires a solution to guarding vital energy and trade routes. He said Turkey's high-level dialogue aims to swiftly chart out "actionable steps" to end the war before there is further destruction to the region and global economy.²³⁶

Pakistan's initiative was part of its efforts to broker an end to the Iran war, with the first discussions focused on proposals to reopen the Strait of Hormuz to shipping. Meanwhile, Iran

warned the US against launching a ground attack , and global oil prices surged amid continued fighting between Iran, the US, and Israel.

On March 29, Foreign Minister Dar said that foreign ministers from Türkiye, Saudi Arabia, and Egypt had expressed full support for dialogue and diplomacy as the only workable path to an early and permanent resolution of the US-Israel-Iran conflict.²³⁷

The four countries had floated proposals to Washington tied to maritime traffic and reopening the Strait of Hormuz, as part of wider efforts to stabilize shipping flows. Pakistan had used its close ties to both Tehran and Washington to appear as a key diplomatic channel in the conflict, while Ankara and Cairo had also played a role.²³⁸

Proposals, including those from Egypt, had been sent to the White House earlier, and they included Suez Canal-style fee structures. Türkiye, Egypt, and Saudi Arabia could form a consortium to manage oil flows through the waterway and had asked Pakistan to take part. Islamabad had not been formally asked to join and claimed that it would not. The proposal for a management consortium had been discussed with the US and Iran. Ankara's priority was securing a ceasefire. It wanted to ensure the safe passage of ships that could serve as an important confidence-building measure in this regard.²³⁹

It was unclear what, if any progress, the talks had made. The countries did not issue joint statements about the discussions.

After the meeting, Al Saud, Saudi Arabia's foreign minister, met Sharif. They were accompanied by Dar and Malik, the national security adviser, and head of Pakistan's premier intelligence agency. Reaffirming Pakistan's "full and unwavering solidarity" with Saudi Arabia, Sharif praised what he described as the kingdom's restraint during the current crisis. He assured the Saudi foreign minister that Pakistan would "always stand shoulder to shoulder" with Saudi Arabia. Turkey's foreign minister, Fidan, and Egypt's, Abdelatty, also had separate meetings with Sharif.

²⁴⁰

Pakistan has its own stake in the regional crisis, including facing a resulting energy crunch, and it has recently intensified efforts at shuttle diplomacy between the US and Iran. The Islamabad talks build on discussions held in Riyadh on March 19, where the same four countries met on the sidelines of a broader summit of Arab and Islamic nations to discuss "the Iranian escalation in the region," along with the importance of continued consultation and coordinating efforts to achieve security and stability, according to a statement from Saudi Arabia's foreign ministry.²⁴¹

It was expected that a joint course of action for peace and stability in the region would appear from the discussions. Pakistan had appeared as a key mediator between the US and Iran in their ongoing conflict, which has spread across the Gulf region.

Pakistan was acting enthusiastically as an intermediary in the proposed negotiations between Iran and the US for ending the war. Trump has appeared anxious to wind down the unpopular war, and emphasized what he has described as productive negotiations aimed at a diplomatic solution, despite repeated assertions from Tehran that no such talks have begun. The back-channel efforts by Pakistan might just work, as the country has excellent relations with the US

and Gulf allies, as well as good relations with neighboring Iran. Pakistan is on a tight rope and is balancing its position between the adversaries. China has expressed its hope of ending the war, and so have many other countries. The required breakthrough, though desperately needed, will not happen as the trust deficit between Iran and the US is now seemingly insurmountable. On March 28, Iranian President Pezeshkian told Pakistan's Prime Minister Sharif that trust is needed to ease talks and mediation on the conflict in the Middle East. Pezeshkian had praised Pakistan's diplomatic efforts and said that the two leaders had discussed hostilities in the region and efforts to end the conflict during a call that lasted over an hour. Sharif briefed Pezeshkian on Pakistan's diplomatic contacts with the US and Gulf states.²⁴²

During the talks in Pakistan, Ghalibaf, the speaker of Iran's parliament, accused President Trump on March 29 of engaging in a front of diplomacy while "secretly planning a ground invasion."²⁴³

Meanwhile, Iran started a confidence-building measure. President Trump said on March 29 that Iran would allow the passage of 20 cargo ships starting on March 30, as a "sign of respect" to the US. He also cast Tehran's decision as a sign that negotiations to end the war were underway. Earlier, Iran allowed about 10 ships to transit the strait, a development that Trump also described as a sign of progress.²⁴⁴

Saudi Arabia was reluctant to directly criticize Iran for obvious reasons. It faces a serious predicament now and is acting very cautiously. Vivian Nereim, in his excellent article "Iran war draws attention to U.S. troop presence in Saudi Arabia," The New York Times, March 29, 2026, clearly explains that:²⁴⁵

Days after an Iranian strike on a Saudi air base injured 12 American troops, the Saudi government has yet to acknowledge the attack. Its silence underscores the fraught position that Saudi Arabia has found itself in during the U.S.-Israeli war with Iran. A close U.S. ally and regional rival of Iran, the kingdom has faced hundreds of Iranian missile and drone attacks since the war began. Most were intercepted, but some killed civilians and damaged oil installations. Last week, President Trump told reporters that Crown Prince Mohammed bin Salman of Saudi Arabia is "fighting with us." Yet Saudi leadership has stopped short of participating in or publicly endorsing the war effort...the tension between Mr. Trump's remarks and Saudi official statements highlighted how Gulf governments had been stretched in multiple directions by this war....Officially, the Saudi government — along with leaders of most Gulf countries — has said that it is not allowing its territory or airspace to be used for American attacks against Iran. That is partly because Saudi officials fear that doing so would attract even more Iranian attacks. But it is also because the idea of hosting American soldiers in the kingdom — particularly as part of a joint U.S.-Israeli offensive — is deeply controversial among Saudi citizens.... There is, however, a significant U.S. military presence in the kingdom, particularly at the base that came under attack on Friday — Prince Sultan Air Base, southeast of the capital, Riyadh. The monthlong Iran war has drawn uncomfortable attention to that fact, as the base has faced repeated attacks....It

is not entirely clear what stance Prince Mohammed — the de facto Saudi ruler — has taken toward the rapidly evolving war....earlier this month, the Saudi foreign minister warned that his government had limited patience with Iran and reserved the right “to take military actions if deemed necessary(Trump) reiterated the claim that the Gulf states were fighting with the United States.

Pakistan wanted Beijing to use its leverage over Tehran to help de-escalate tensions and push Iran towards negotiations. China has the capacity to nudge Tehran towards the negotiating table, adding that Beijing could also play a wider role in shaping any eventual agreement between the warring sides. China had already signaled support for Pakistan's efforts. China's Foreign Ministry said it "commends and supports Pakistan's mediation efforts for de-escalation" and stands ready to enhance coordination with Islamabad and other stakeholders to work for a ceasefire and peace. Dar's outreach comes amid reports that Iran-US talks could take place this week in Islamabad.²⁴⁶

Dar said on March 29, after the quad meeting, that Pakistan was preparing for an important meeting and that both Iran and the United States had expressed confidence in Islamabad's efforts.²⁴⁷

Meanwhile, on March 30, Trump sharply raised the stakes, warning that Washington could unleash widespread destruction on Iran's critical infrastructure if a deal to end hostilities is not reached "shortly".

The widening and increasingly volatile conflict showed no sign of abating, as fresh strikes, mounting military deployments, and stark warnings of escalation underscored the risk of a broader regional and economic crisis.

Trump's threats included targeting oil facilities, power plants, and even desalination systems that supply drinking water. They came as Washington continued to project confidence about diplomatic progress, even as Tehran publicly rejected US proposals as "unrealistic, illogical, and excessive".

At the center of tension lies the Strait of Hormuz, a vital global energy artery through which one-fifth of the world's oil passes. Iran has effectively blocked the narrow waterway, triggered fears of prolonged supply disruption and fueling a sharp surge in global oil prices.²⁴⁸

Brent crude climbed to around \$115 per barrel, marking a 60% increase since the war began on February 28, as markets braced for further escalation. The International Monetary Fund and G7 finance leaders have warned of serious spill-over risks to global economic stability.

"The United States of America is in serious discussions with A NEW, AND MORE REASONABLE, REGIME to end our Military Operations in Iran," Trump wrote in a social media post, adding that "great progress" has been made in the talks.

"But, if for any reason a deal is not shortly reached, which it probably will be, and if the Hormuz Strait is not immediately 'Open for Business,' we will conclude our lovely 'stay' in Iran by blowing up and completely obliterating all of their Electric Generating Plants, Oil Wells and Kharg Island (and possibly all desalinization plants!), which we have purposefully not yet 'touched'," he said.²⁴⁹

On the battlefield, both sides intensified attacks. Iran launched fresh waves of missiles targeting Israel and struck infrastructure across the Gulf. In Kuwait, an Iranian strike hit a power and desalination plant, killing one worker and injuring 10 soldiers.

Saudi Arabia intercepted multiple missiles aimed at its oil-rich Eastern Province, while air defenses in the United Arab Emirates shot down a projectile over Dubai. Turkey also reported intercepting a ballistic missile that briefly entered its airspace, highlighting the conflict's expanding geographic reach.

Inside Israel, a fire broke out at an oil refinery in Haifa for the second time during the war, while residential areas in cities including Shefaram and Haifa suffered damage from Iranian missile strikes. Sirens also sounded near sensitive strategic sites, reflecting sustained pressure on Israeli defenses.

Israel, backed by the US, launched a new wave of strikes on Iran, targeting what it described as military infrastructure. Explosions were reported across Tehran, and a petrochemicals facility in Tabriz sustained damage in an airstrike.

The US has significantly reinforced its military presence in the region. Thousands of troops from the 82nd Airborne Division have begun arriving, adding to deployments of Marines, naval forces, and special operations units already in place.

The troop build-up is intended to expand Washington's military options, including the possibility still under consideration of deploying ground forces inside Iran for missions such as securing oil routes, extracting nuclear material, or seizing strategic assets like Kharg Island, which handles the bulk of Iran's oil exports.

Despite the military escalation, the White House insists diplomacy stays active. Officials say talks are progressing through intermediaries, though analysts note a persistent gap between public rhetoric and private signals from both sides.

Trump has even floated the idea of calling on Arab states to help finance the war effort, while setting an informal deadline for Iran to reopen the Strait of Hormuz. Failure to comply, he warned, could trigger devastating US strikes.

Iran, however, has responded with defiance. Senior officials warned that any US ground incursion would be met with force, with one senior figure saying Iranian troops were ready to "set them on fire" if American forces entered the country.²⁵⁰

Tehran has also hinted at further escalation options, including mining the Persian Gulf and potentially withdrawing from the Nuclear Non-Proliferation Treaty (NPT), a move that would deepen fears over nuclear proliferation.

The human cost of conflict continues to rise. Iranian authorities say more than 1,900 people have been killed, while at least 19 have died in Israel. Dozens more have been killed across the Gulf and other affected areas, with many casualties reported to be civilians. More than 300 US troops have been injured and 13 killed since the start of operations.

The conflict has also triggered geopolitical ripples far beyond the immediate region. Spain has barred US military planes involved in the war from using its airspace, reflecting growing unease among some allies over the scope and legality of the campaign.

As military activity intensifies and diplomatic efforts struggle to gain traction, the war is entering a more dangerous phase, with the risk of confrontation expanding and the consequences for the global economy becoming harder to hold.²⁵¹

Meanwhile, the Iran war is not just affecting energy supplies. It is also cutting deeply into supplies of the invisible gas that is essential for cooling artificial-intelligence chip-making tools and keeping MRI scanners humming. The global supply of helium—the natural-gas byproduct better known for keeping party balloons aloft—is being squeezed by a halt in natural-gas exports from Qatar, the source of about a third of the world’s total. Customers for the gas are being told to expect supply cuts and surcharges as Persian Gulf supplies dry up.²⁵²

The Editorial, “Trump’s Iran Target List, Good and Bad,” published in the WSJ, on March 30, laments that: just a regime?

President Trump is whipsawing, in his familiar fashion, between hailing diplomacy with Iran and issuing new threats if peace talks fail. He has also issued a new and broader target list, but some of the possible sites he mentions would do more harm to the Iranian people than to the regime. “Great progress has been made [in negotiations] but, if for any reason a deal is not shortly reached,” Mr. Trump posted on Truth Social Monday morning, “we will conclude our lovely ‘stay’ in Iran by blowing up and completely obliterating all of their Electric Generating Plants, Oil Wells and Kharg Island (and possibly all desalinization plants!).”

On March 30, Trump told aides he’s willing to end the U.S. military campaign against Iran even if the Strait of Hormuz remains largely closed, administration officials said, likely extending Tehran’s firm grip on the waterway and leaving a complex operation to reopen it for a later date. In recent days, Trump and his aides assessed that a mission to pry open the chokepoint would push the conflict beyond his timeline of four to six weeks. He decided that the U.S. should achieve its main goals of hobbling Iran’s navy and its missile stocks and wind down current

hostilities while pressuring Tehran diplomatically to resume the free flow of trade. If that fails, Washington will press allies in Europe and the Gulf to take the lead on reopening the strait.²⁵³

On March 31, France and Italy pushed back against some U.S.-Israeli military operations, sources said on Tuesday, as U.S. President Donald Trump criticized NATO allies in Europe as unhelpful in the month-long war in Iran, highlighting divisions.

The decisions came against a backdrop of tensions between Washington and key partners over the war. Earlier this month, Trump called longtime NATO allies "cowards" over their lack of support. On March 31, he slammed countries that did not help in the U.S.-Israeli strikes.²⁵⁴

Trump accused France of blocking planes carrying military supplies to Israel from flying over its territory, writing on Truth Social that France had been "VERY UNHELPFUL".

The French presidency said it was surprised by the post and said its decision was consistent with France's policy since the conflict began.

Israel's defense ministry accused France of actively obstructing the transfer of munitions to Israel. It said the French ban was imposed despite prior coordination and assurances that the munitions were intended solely for use against Iran, adding that the effort was critical to European security.²⁵⁵

The ministry said Israel would cut all defense procurement from France and would have no new engagement with the French military. French arms sales to Israel are small, and it was unclear whether the move would affect French troops serving with UN peacekeepers in Lebanon.

Earlier, Italy had denied permission for US military planes to land at the Sigonella air base in Sicily before heading to the Middle East. Italy's Defence Minister Guido Crosetto later denied any rift with Washington or any policy change. He posted a message on X to say that U.S. airbases remained active, but that Washington needed special permission for uses outside existing agreements.

Meanwhile, Spain defended its decision to fully close its airspace to U.S. planes involved in attacks on Iran.

Prime Minister Pedro Sanchez has been among the most vocal critics of the U.S. and Israeli strikes, and Defence Minister Margarita Robles said Spain will only allow for the use of its bases for the collective defense of NATO allies.

Trump wrote on Truth Social: "All of those countries that can't get jet fuel because of the Strait of Hormuz, like the United Kingdom, which refused to get involved in the decapitation of Iran, I

have a suggestion for you: Number 1, buy from the U.S., we have plenty, and Number 2, build up some delayed courage, go to the Strait, and just TAKE IT."²⁵⁶

On April 1, Trump and Rubio said the end of the war with Iran could be near, with the Trump administration signaling potential for both direct talks with Tehran's leadership and a winding down of the conflict even without a deal. The remarks underscored the shifting and at times contradictory timelines and statements from Washington about how and when the war, now in its fifth week, might end.

The Trump administration had previously threatened to intensify operations if Tehran did not accept a 15-point US ceasefire framework that had among its core demands that Iran commit not to pursue nuclear weapons, halt all uranium enrichment, and fully reopen the Strait of Hormuz. Rubio said there was potential for a meeting between both sides "at some point" and the US could "see the finish line".²⁵⁷

On March 31, the UAE was preparing to support US-led efforts to reopen the Strait of Hormuz by force. It was seeking a UN Security Council resolution for the action and suggested the US occupy strategic islands. It is urging the US and military powers in Europe and Asia to form a coalition to secure the strategic waterway. It was also reviewing potential military roles, including mine-clearing operations, as it weighs becoming a direct participant in the conflict for the first time. The UAE Foreign Ministry said there is "broad global consensus that freedom of navigation in the Strait of Hormuz must be preserved," pointing to international condemnation of disruptions in the waterway.²⁵⁸

Trump, on March 31, criticized countries that have not helped the US war effort, such as NATO member Britain. Trump threatened to leave NATO. "Oh yes, I would say [it's] beyond reconsideration," he said. "Never swayed by NATO. I always knew they were a paper tiger, and Putin knows that too." Trump has recently called NATO "cowards" for refusing to send troops to the Strait of Hormuz.

"NATO is a one-way street," Rubio said, noting Europe was eager for the US to defend it but had not stepped up to provide the help the US looked for. "After this conflict is concluded, we are going to have to reexamine that relationship," Rubio said.²⁵⁹

Rubio said messages were being exchanged between Iran and the US, and there is the potential to have a "direct meeting at some point" between the two sides. Messages are being exchanged, and talks are going on. There is the potential for a direct meeting at some point," Rubio said.

On March 31, Trump, who had offered shifting timelines and aims for the war, ranging from toppling Iran's government to weakening its military and regional influence, said the US could end its military attacks on Iran within two to three weeks.

Rubio said, "There's nothing any government is doing, or any country in the world is doing now to help Iran that is in any way impeding our mission." He added that Washington will have to

reexamine its relations with NATO after the Iran war. "Ultimately, that's a decision for the president to make, and he'll have to make it," Rubio said.

"But I do think, unfortunately, we are going to have to reexamine whether or not this alliance that has served this country well for a while is still serving that purpose, or has it now become a one-way street where America is simply in a position to defend Europe, but when we need the help of our allies, they're going to deny us basing rights, and they're going to deny us overflight," he added in reference to use of military bases.²⁶⁰

Trump and Rubio said the end of the war with Iran could be near, with Washington signaling potential for both direct talks with Tehran's leadership and a winding down of the conflict even without a deal.

The remarks underscored the shifting, often contradictory timelines, and statements from Washington about how and when the war, now in its fifth week, might end.

"We'll be leaving very soon," Trump said on March 31, saying the exit could take place "within two weeks, maybe two weeks, maybe three".

The Trump administration had previously threatened to intensify operations if Tehran did not accept a 15-point US ceasefire framework that had among its core demands that Iran commit not to pursue nuclear weapons, halt all uranium enrichment, and fully reopen the Strait of Hormuz.

Meanwhile, attacks were reported on both sides early on April 1, with Iranian drones hitting Kuwait, Bahrain, and Doha. Iran's largest passenger terminal, found in Bandar Abbas port on the Gulf, was hit by an overnight air strike.

Gulf countries, some home to US bases, had been repeatedly fired on by Tehran during the US-Israeli war, with concerns mounting about Iran's closure of the Strait of Hormuz and ability to use the vital waterway, as a bargaining chip.

A spokesperson for Iran's Foreign Ministry said, "Iran is focused on defending its territory and believes the U.S. isn't serious about diplomacy".²⁶¹

Meanwhile, the aircraft carrier USS George H.W. Bush and its accompanying warships are deploying to the Middle East, joining two other U.S. carrier strike groups in the region. China and Pakistan issued a five-point peace initiative to "restore peace and stability" in the region.²⁶²

While the US has said talks with Iran were ongoing, Iranian Foreign Minister Araqchi said on March 31 that he has been receiving direct messages from US special envoy Witkoff, but those do not constitute "negotiations". The messages include threats or exchanged views delivered through "friends," he added.²⁶³

European leaders have refused to get directly involved in military attacks against Iran.

Spokesperson for the Iranian Foreign Ministry, Baqaei, said that Tehran has received messages from mediators about the ongoing US-Israeli military aggression, but its stance stays "clear and defensive." Baqaei said Iran had been attacked twice in the past nine months during ongoing

diplomatic processes with the United States, describing the February 28 assault as a direct breach of diplomacy, despite Oman's mediation.

He said that US claims of imminent Iranian threats or nuclear concerns are unfounded, as Iran's nuclear program is peaceful, and said the war imposed on Iran is based on US ambitions rather than legitimate security concerns. Baqaei reiterated that Iran did not start the conflict, which he described as an illegal and aggressive war by the US, and emphasized that Washington must stop the hostilities while Iran continues to defend itself.

Meanwhile, the death toll in Israel had reached 19. Yemen's Houthis, who joined the regional war in recent days, said they conducted a missile attack on Israel, describing it as a joint operation with Iran and the Tehran-backed Hezbollah in Lebanon, the first such collaboration between them during the war.

Current Supreme Leader of Iran, Mojtaba Khamenei, praises Hezbollah in a message to the Lebanese group's chief and vows his continuous support on his Telegram channel. The war has also revived conflict between Israel and Hezbollah. At least seven people were killed and 24 wounded in two Israeli strikes in the Beirut area. Israel said it was targeting two senior Hezbollah figures. Israel says it killed Hezbollah's Southern Front commander Hashem in the attack on Beirut. As of April 1, joint US-Israeli strikes in Iran and Israeli attacks in Lebanon have killed thousands and displaced millions. The war has also raised oil prices and shaken global markets. As of April 1, joint US-Israeli strikes in Iran and Israeli attacks in Lebanon have killed thousands and displaced millions. The war has also raised oil prices and shaken global markets.²⁶⁴

Meanwhile, the war continued. Attacks were reported on both sides early on April 1, with drones hitting fuel tanks at Kuwait's international airport, causing a big blaze, and authorities in Bahrain reporting a fire at an undisclosed company facility from an Iranian attack. Gulf countries, some home to US bases, have been repeatedly fired on by Tehran during the US-Israeli war, with concerns mounting about Iran's closure of the Strait of Hormuz and ability to use the vital waterway, a conduit for a fifth of global oil and liquefied natural gas, as a bargaining chip.

Oil markets were subdued as trading resumed in Asia on April 1, but stocks and bonds rallied at the start of the session on hopes of a de-escalation. The MSCI's broadest index of Asia-Pacific shares outside Japan was up 2.7% after a four-day losing streak as the Nikkei 225 jumped 3.9% at one point after Trump's latest remarks. Stocks on Wall Street soared on March 31 as traders bet on the potential off-ramp, sending the S&P 500 (SPX) 2.9% higher.²⁶⁵

Meanwhile, higher oil and fuel prices have started to weigh on U.S. household finances and are a political headache for Trump and his Republican Party before the November midterm elections. Two-thirds of Americans believe the U.S. should work to end its involvement in the

Iran war quickly, even if that means not achieving the goals set out by the Trump administration, a Reuters/Ipsos poll found.²⁶⁶

The UAE was preparing to help the US and allies open the Strait of Hormuz by force, the Wall Street Journal reported on March 31, to end its effective closure. The UAE was seeking a UN Security Council resolution for the action and suggested the US occupy strategic islands.

On March 31, the IRGC hit back with a new threat against US companies in the region, starting on April 1. It listed 18 businesses, including Microsoft, Google, Apple, Intel, IBM, Tesla, and Boeing, which would be targeted at 1630 GMT.²⁶⁷

Israel's military said on April 1 that it had conducted more than 800 strike sorties against Iranian targets during the war, involving 16,000 munitions and 5,000 new targets found. The Israeli military also said it had found the launch of a missile from Yemen towards Israel, adding that air Defence systems were running to intercept the threat. Yemen's Iran-aligned Houthis joined the regional war in recent days, launching missiles in Israel in support of Tehran.

The war has also revived conflict between Israel and the Iran-backed Lebanese group Hezbollah. At least seven people were killed and 24 wounded in two Israeli strikes in the Beirut area, the Lebanese health ministry said on April 1. Israel's military said on April 1 that it conducted two separate strikes targeting a senior Hezbollah commander and another senior member of the Iran-aligned group in the Beirut area. It did not find them or say whether they had been killed.²⁶⁸

Earlier, as the war neared the three-week mark, most of Iran's major energy facilities, as well as major assets in nearby countries, had been targeted. However, the Islamic Revolutionary Guard Corps (IRGC) denied that U.S. and Israeli airstrikes have crippled Iran's ability to produce missiles. Iran projected defiance, with the new supreme leader declaring that "safety must be taken away" from the country's enemies and its armed forces vowing to pursue them even in tourist spots.²⁶⁹

Iran has effectively blocked the Strait of Hormuz, one of the world's busiest oil shipping channels since the war began. The impact has been severe. Bounded to the north by Iran and to the south by Oman and the United Arab Emirates (UAE), the waterway is only about 50km (31 miles) wide at its entrance and exit, and about 33km wide at its narrowest point. The Strait of Hormuz connects the Gulf with the Arabian Sea. About 20% of the world's oil and liquefied natural gas (LNG) usually passes through the strait, with oil coming not only from Iran but also from other Gulf states such as Iraq, Kuwait, Qatar, Saudi Arabia, and the UAE.

The impact of closing the Strait has been severe.

About 3,000 ships usually sail through the strait each month, but this has dramatically decreased recently, with Iran threatening to attack tankers and other ships.

At least 21 vessels have been hit or targeted, or have reported attacks, since the start of the war, according to an AFP news agency tally on 18 March.

Global fuel prices have soared in the wake of the war. Crude oil has risen above \$100 a barrel - up almost 70% this year and 50% from a year ago.²⁷⁰

President Trump again lashed out at NATO members for not joining a U.S. effort to open the Strait of Hormuz, calling the alliance "A PAPER TIGER" on social media.²⁷¹

Meanwhile, Qatar's energy minister said Iranian strikes on LNG facilities reduced the country's export capacity by 17%.²⁷²

President Trump again vented his fury at U.S. allies for declining to help open the strait while fighting continued. He said they were "COWARDS, and we will REMEMBER!" he wrote. The US allies were not consulted in the conflict with Iran.²⁷³

The benchmark price of Brent crude oil was up slightly, near \$110, after surging the day before on growing fears that the largest ever disruption to world energy supplies would trigger a global economic shock.

Even if the conflict does stop soon, there will be no rapid recovery from the upheaval caused by airstrikes and Iran's virtual closure of the Strait of Hormuz, the conduit for 20% of the world's oil and liquefied natural gas.

Israel did promise to avoid further attacks on Iran's South Pars gas field the day after an Iranian retaliatory strike on Qatar caused damage that will leave the world short of natural gas for years to come.

But Kuwait's state oil firm said its Mina Al-Ahmadi refinery had suffered multiple drone attacks on Friday that set some units alight.

Germany, Britain, France, Italy, the Netherlands, and Canada, as well as NATO non-member Japan, pledged in a joint statement on Thursday to join "appropriate efforts to ensure safe passage through the Strait".

The leaders of Germany and France, however, made clear that this presupposed an end to the fighting.

While soaring U.S. diesel and gasoline prices can only hurt Trump's core political support, the war is also unpopular with voters, and a potential ground operation even more so, as his Republicans prepare to defend slim majorities in midterm congressional elections.

The US was considering deploying thousands more troops to the Middle East, potentially even landing on Iran's shore or its Kharg Island oil export hub.

Flows of crude and petroleum have dropped by about twelve million barrels per day - 12% of global demand - due to output cuts and export halts by Gulf producers.

Those barrels cannot easily be replaced by the transport, shipping, and manufacturing industries that rely on them, and will make themselves felt for months or even years.

International Energy Agency chief Fatih Birol told the Financial Times that restoring oil and gas flows might take six months.

Israel's military said it had attacked government facilities in Tehran, and that it had this week killed a key commander in Iran's intelligence ministry, Mahdi Rostami Shamastan.

The semi-official Iranian news agency Tasnim said intelligence minister Esmail Ahmadi had also been killed, the latest of dozens of leading government, military, and scientific figures assassinated by Israel.

"We have nobody to talk to," Trump said. "And you know what? We like it that way."

The war has already killed thousands and displaced millions, mostly in Iran and in Lebanon, where Israel has attacked the Iranian-backed Hezbollah militia in the south and in Beirut.²⁷⁴

The escalating U.S.–Israeli war with Iran and Tehran's retaliation against Gulf neighbors have severely disrupted Middle Eastern energy infrastructure and global oil and gas flows. Israeli strikes on Iran's South Pars gas field and the Azaliyah processing hub on March 18 triggered a wave of retaliatory attacks across the Gulf that hit refineries, gas plants, and export terminals in Saudi Arabia, Kuwait, Qatar, the United Arab Emirates, and Bahrain.

Multiple key facilities have been damaged or shut down. Drone and missile attacks struck refineries and LNG plants in Saudi Arabia, Kuwait, and Qatar, while missile debris forced the shutdown of the UAE's massive Hasham gas complex and repeated attacks targeted its Fujairah export terminal.

Bahrain declared force majeure after its Sitra refinery was attacked, and Iraq sharply cut output from its southern oilfields despite avoiding direct strikes. Several export hubs were spared direct damage but saw operations halted due to security threats, intercepted missiles, or precautionary shutdowns.

Iran's military said strikes on Iran's energy infrastructure had led to "a new stage in the war," in which it had attacked energy facilities linked to the United States.

“If strikes (on Iran’s energy facilities) happen again, further attacks on your energy infrastructure and that of your allies will not stop until it is destroyed,” Iranian military spokesperson Ebrahim Zulficar said, according to the Tehran media.

Qatar Energy’s CEO told Reuters the Iranian attacks had knocked out a sixth of Qatar’s LNG export capacity, worth \$20 billion a year, and that repairs would take three to five years. Israeli media reported that an Iranian strike hit oil facilities in Israel’s port of Haifa, causing damage but no casualties.²⁷⁵

The strikes on regional energy facilities underscored Iran’s continued ability to exact a heavy price for the U.S.-Israeli campaign, and the limits of air defenses in protecting the Gulf’s most valuable and strategic energy assets.

The disruptions have sent energy prices surging worldwide. Middle East crude benchmarks hit record highs, U.S. diesel prices rose above \$5 a gallon, and gasoline reached its highest level since late 2023. Asian refiners cut runs amid feedstock shortages, while governments from China to South Korea imposed export controls or price caps. The International Energy Agency called for a historic release of 400 million barrels from global reserves, underscoring the scale of the shock to energy markets and consumers.²⁷⁶

Earlier, on March 26, a US deployed three more warships and 2,500 more Marines were bound for the Middle East, where the U.S. military says it had about 50,000 troops. The Pentagon’s request for another \$200 billion to fund the war would need congressional approval as the US national debt hits a record \$39 trillion.

On one of the holiest days on the Islamic calendar, Iran fired on Israel and energy sites in neighboring Gulf Arab states, insisting that it can still build missiles and issuing a new threat to deny safety to its enemies in “parks, recreational areas, and tourist destinations” worldwide. Israel, meanwhile, pounded Tehran with airstrikes as Iranians marked Nowruz, the Persian New Year.

Prime Minister Benjamin Netanyahu said that Iran could no longer enrich uranium or make ballistic missiles. US leaders said weeks of American and Israeli strikes had decimated Iran’s military. Little information had come from Iran about damage to its weapons and energy facilities since the war began three weeks ago. Netanyahu said Israel will refrain from any further attacks on the Iranian gas field at the request of Trump. Iran responded to Israeli and American attacks by intensifying targeting of energy infrastructure in other Middle East countries, sending oil and gas prices soaring.²⁷⁷

John Hudson, Warren P. Strobel, and Steve Hendrix, in their article “U.S.-Israeli rift widens over potential endgame in Iran,” published in the Washington Post on March 20, said that:²⁷⁸

Israel's assault on the world's largest natural gas deposit has renewed tensions between the two allies' end goals in Iran. When the United States and Israel started the war against Iran last month, their messages were perfectly coordinated on the sweeping goal of regime change. President Donald Trump told Iranians to seize their "only chance" for generations to "take over your government," and Prime Minister Benjamin Netanyahu implored them to "cast off the yoke of this murderous regime." The comments reflect widespread criticism of President Donald Trump's handling of a war involving Iran, with many attributing the conflict to his impulsive decision-making and alleged manipulation by Israeli Prime Minister Benjamin Netanyahu.

Trump on March 21 threatened to "obliterate" Iran's power plants if Tehran does not fully reopen the Strait of Hormuz within 48 hours, a significant escalation barely a day after he talked about "winding down" the war.

"If Iran doesn't FULLY OPEN, WITHOUT THREAT, the Strait of Hormuz, within 48 HOURS from this exact point in time, the United States of America will hit and obliterate their various POWER PLANTS, STARTING WITH THE BIGGEST ONE FIRST!" Trump said on social media. Trump's ultimatum would expand the scope of U.S. strikes to infrastructure that affects daily civilian life in Iran.

Trump and his administration have sent mixed messages about U.S. goals throughout the war, now in its fourth week, leaving US allies struggling to respond.

Trump's ultimatum on March 21 was the most abrupt shift yet. Trump's rhetoric pivoted from a drawdown to an explicit 48-hour countdown to strike Iran's power infrastructure, even as U.S. Marines and heavy landing craft continue heading to the region.

Iran's largest power plants include the Damavand power plant near Tehran (2,868 megawatts of capacity), the Kerman plant in southeastern Iran (1,910 MW), and the Ramin steam power plant in Khuzestan province (1,890 MW), according to industry and energy databases.

The country's sole nuclear plant at Bushehr on Iran's southern coast produces about 1,000 MW.

Earlier this month, Trump raised the idea of destroying Iran's power grid even while downplaying the notion. "We could take apart their electric capacity within one hour, and it would take them 25 years to rebuild," Trump told reporters on March 11. "So ideally, we're not going to be doing that."²⁷⁹

American voters appear increasingly concerned that the war could expand. Energy price shocks are causing inflation, hitting consumers and businesses hard, a major political liability for Trump as he seeks to justify the war to the public before the November elections in which control of Congress is at stake...²⁸⁰

The threat of Iranian attacks has kept most ships from getting through the strait, a narrow waterway that serves as the conduit for around a fifth of global oil and liquefied natural gas supplies, threatening a global energy shock. Its near-closure sent European gas prices surging as much as 35% last week.

Energy prices spiked last week after Iran responded to an Israeli attack on its major gas field by hitting Qatar's Ras Laffan Industrial City, which processes around a fifth of the world's liquefied natural gas, causing damage that will take years to repair.

The threats to Gulf infrastructure came as the conflict entered dangerous, unfamiliar territory.

Israeli officials said Iranian forces had for the first time fired long-range missiles, expanding the risk of attacks beyond the Middle East, even as an Iranian strike injured dozens of people close to Israel's nuclear site.

Iran launched two ballistic missiles with a range of 4,000 km (2,500 miles) at the U.S.-British military base at Diego Garcia in the Indian Ocean, Israeli military chief Eyal Zamir said. The Israeli military said it was the first time Iran had used long-range missiles since the United States and Israel began attacking Iran on February 28.

"These missiles are not intended to strike Israel. Their range reaches European capitals - Berlin, Paris, and Rome are all within direct threat range," Zamir said in a statement on Saturday.

A source at Britain's defense ministry said the attack had occurred before the government gave specific authorization on Friday for the U.S. to use British military bases to conduct strikes on Iranian missile sites.

By March 21, more than 2,000 people had been killed during the war. Israeli airstrikes had killed over 1,000 people in Lebanon and displaced more than one million, according to the Lebanese government. In Israel, fifteen people had been killed by Iranian missile fire. At least 13 U.S. military members had been killed. Many Palestinians in the occupied West Bank were killed as Israel and Iran exchanged airstrikes.²⁸¹

On March 21, he was confronted with a crisis that seemed to be slipping out of his hands: Global energy prices were surging, the US stood isolated from allies, and more troops were preparing to deploy despite his promise that the war would be only a "short excursion."

A defensive Trump called other NATO countries "cowards" for refusing to help secure the Strait of Hormuz and insisted the campaign was unfolding according to plan. But his declaration on Friday that the battle "was Militarily WON" clashed with the reality of a defiant Iran that is choking off Gulf oil and gas supplies while launching missile strikes across the region.

Meanwhile, the war had also shown that Trump's once-iron grip over his MAGA movement was weakening, with prominent influencers speaking out against the conflict. While his base had

mostly stood with him so far, analysts said that Trump's control could weaken in the coming weeks if gas prices kept rising and US troops were deployed.

"As the economics play themselves out," Republican strategist Dave Wilson said, "people will start to say: 'Why am I paying high gas prices again? ... Why is the Strait of Hormuz now deciding whether I can take a vacation next month?'"²⁸²

Since the war's start on February 28, there has been a growing realization within the administration that the conflict and its consequences should have been better mapped out in advance, according to two sources familiar with White House thinking, although the first White House official countered that the campaign was extensively planned and well-equipped for any potential action.

Trump's biggest misjudgment was over how Iran would respond to a conflict that it considers existential.

Tehran has retaliated with its remaining missiles and a fleet of armed drones to offset its foes' military superiority, striking neighboring Gulf states and mostly shutting down the Strait of Hormuz, the conduit for one-fifth of the world's oil.

Whether or not Trump and his aides foresaw the dangers, they have been unable to counter them effectively. As the conflict has dragged on, there have been increasing signs of Trump's frustration with his inability to control the narrative. In recent days, he has torn into the news media, advancing unfounded allegations of "treason" for reporting that he sees as undermining the war effort.²⁸³

On March 21, President Trump posted that Washington was considering "winding down" its military operation against Iran.

In a social media post, Trump said the U.S. was close to meeting its goals but insisted that other countries should take the lead in policing the Strait of Hormuz, the shipping lane whose near closure threatens a global energy shock.

"We are getting very close to meeting our objectives as we consider winding down our great Military efforts in the Middle East with respect to the Terrorist Regime of Iran," Trump said on Truth Social.

Trump and his administration have sent mixed messages about U.S. goals throughout the war, now entering its fourth week, leaving traditional U.S. allies struggling to respond.

American voters appear increasingly concerned about signs that the war could expand. Energy price shocks are adding to inflation, hitting consumers and businesses hard, which is a major political liability for Trump as he seeks to justify the war to the US public before the November elections, in which he could lose control of Congress.

Trump had also accused NATO allies of cowardice over their reluctance to help open the strait. Some allies have said they will consider it, but most say they are reluctant to join a war that Trump started without consulting them.²⁸⁴

An editorial, “Iran Attacks the Gulf Arabs. Will They Fight Back?” published in the Wall Street Journal on March 20, aptly remarked that: ²⁸⁵

After Iran hit Qatar’s Ras Laffan gas hub with ballistic missiles on Wednesday, the Gulf monarchy expelled military attachés at the Iranian embassy. But not the ambassador. He can stay, which raises an uncomfortable question: What would it take for America’s Gulf allies to stop hedging their bets? The Gulf Arab caution is, in one sense, understandable. These states are on the front lines of Iran's attacks, and they must live in Tehran’s neighborhood after the bombing stops. The U.S. isn’t always dependable—see Joe Biden’s denunciation of the Saudis. The United Arab Emirates joined the Abraham Accords and seemed to be getting targeted for it.

Earlier, President Trump had set a March 23, 2026, deadline for Tehran to reopen the strait or face strikes on its power plants. He threatened to “obliterate” Iranian power plants, setting off a cascade of alarm bells around the region, with Tehran saying it would respond in kind. Oil-exporting Gulf countries said Iranian reprisals could further endanger the world economy.

Trump threatened Iran and said that if it does not fully reopen the Strait of Hormuz within 48 hours, the U.S. would act. Iran contended that the U.S. threat raised issues under international law against targeting civilian infrastructure.

Meanwhile, the U.S. ambassador to the United Nations warned about Iran's potential to launch longer-range ballistic missiles that could hit much of Europe. It comes days after Iran conducted one of its farthest missile launches on record, targeting Diego Garcia, a joint U.S.-U.K. military base in the Indian Ocean. Australia and the U.A.E. became the latest countries to back a joint statement now signed by 22 nations signaling their readiness to help secure the Strait of Hormuz.²⁸⁶

Iran said on March 22 it would strike the energy and water systems of its Gulf neighbors in retaliation if U.S. President Donald Trump follows through with a threat delivered a day earlier to hit Iran's electricity grid in 48 hours, escalating the three-week-old war.

The prospect of tit-for-tat strikes on civilian infrastructure could further rattle global markets when they reopen on Monday morning and threaten the livelihoods of millions of civilians in the region who rely exclusively, in some cases, on desalination plants for water.

After more than three weeks of heavy US and Israeli bombardment that officials say has sharply reduced Iran's missile capabilities, Tehran continues to prove the ability to conduct attacks. Air raid sirens sounded across parts of northern and central Israel, including in Tel Aviv, and the occupied West Bank overnight, warning of incoming missiles from Iran.

Hours earlier, the Israeli military said it had completed a wave of strikes on Tehran that targeted a military base as well as weapons production and storage facilities.

Trump continued to make contradictory statements. He issued his warning less than a day after signaling that the US might be considering winding down the conflict, even as US Marines and heavy landing craft were heading to the region.²⁸⁷

"If Iran's fuel and energy infrastructure is attacked by the enemy, all energy infrastructure, as well as information technology...and water desalination facilities, belonging to the US and the regime in the region will be targeted pursuant to previous warnings," Iranian military spokesman Ebrahim Zolfaqari said, according to state media.

But while electricity attacks could hurt Iran, they would be potentially catastrophic for its Gulf neighbors, which consume around five times as much power per capita. Electricity makes their gleaming desert cities habitable, in part by powering the desalination plants that produce 100% of the water consumed in Bahrain and Qatar. Such plants use seawater to meet more than 80% of drinking water needs in the United Arab Emirates, and 50% of the water supply in Saudi Arabia.

Iran's Parliament Speaker Mohammad Qalibaf doubled down, writing on X that critical infrastructure and energy facilities in the Middle East could be "irreversibly destroyed" should Iranian power plants be attacked.

Iran's powerful IRGC said it would also mean the shipping lane where a fifth of global oil and liquefied natural gas normally transits along Iran's southern coast would remain shut.

"The Strait of Hormuz will be completely closed and will not be opened until our destroyed power plants are rebuilt," the IRGC said in a statement.

On March 21, oil prices ended the day at their highest in four years.

Iranian attacks have effectively closed the Strait of Hormuz, causing the worst oil crisis since the 1970s. Its near-closure sent European gas prices surging by as much as 35%.²⁸⁸

The intervention raised the risk of a confrontation between the U.S. and Iran in a waterway that usually carries a fifth of the world's seaborne oil and gas but has been blocked for two months

because of the war. Centcom said: "American forces are actively assisting efforts to restore transit for commercial shipping." Earlier, Tehran said it had forced a U.S. warship to turn back from the Strait of Hormuz, although Centcom quickly denied the report.²⁸⁹

Meanwhile, oil prices had jumped 5% on reports of the warship being turned back, but later gave up half of that. Treasury Secretary Bessent claimed that the U.S. had absolute control of the strait.

But the shipping industry remains to be convinced that the vital oil route, whose closure has damaged global business and trade, is safe to use, with little sign of progress towards a negotiated resolution of Washington's conflict with Iran. Trump gave few details of his plan to aid ships and their crews who have been confined to the Gulf and are running low on food and other supplies.²⁹⁰

The Strait of Hormuz is important because about a fifth of the world's oil and liquefied natural gas (LNG) supplies normally pass through the Strait of Hormuz. The Strait, the only sea exit for these fuels from key exporting countries, lies between Oman and Iran. It is 21 miles wide at its narrowest point, with the shipping lane just 2 miles wide in either direction. OPEC members Saudi Arabia, Iran, Kuwait, and Iraq, as well as former member the UAE, export most of their crude via the strait. Qatar, among the world's biggest LNG exporters, sends most of it through the waterway. Shipping through the Strait has come to a halt, with only a minuscule percentage of vessels transiting, compared with around 125 to 140 daily passages before the Iran war began.²⁹¹

Meanwhile, Trump said on May 4 that the US held "very positive discussions" with Iran.²⁹²

There was growing evidence that Iran's economy was in terrible trouble. The war's costs included a million unemployed, soaring food prices, and an internet shutdown that had stifled the online economy. Inflation was rampant, and staples were unaffordable. Middle Eastern media reports warned of growing shortages and threats to food security. Iran's Oil Minister Paknejad warned the public to cut consumption of energy. And government offices had been ordered to cut electricity use by 70% after 1 p.m. Intelligence had predicted the Iranian economy could only survive for a few weeks, if not days. Trump repeatedly claimed Iran's inability to export oil meant it would have to halt production and risk huge damage to oil wells that could take years to fix.²⁹³

The US strategy had now primarily shifted from military force to economic coercive tools. The Trump administration was now trying to break the resolve of the Iranian regime through sheer economic pressure applied by the institutionalization of a maritime blockade. The Trump administration was now convinced that the strangulation of Iran's oil exports and the imports that sustain regular life there would trigger societal collapse. This will build unbearable pressure on the regime to bow to US demands to permanently renounce its nuclear program. There was simple logic that applied to the strategy. Every nation, no matter what type, would crumble if it could not assure access to the basic economic requirements to sustain itself. The Trump administration was convinced that rising inflation, immense job losses, and shortages in Iran

were due to the blockade. The blockade is an alternative to military operations that did not get the job done. It was also an answer to the de facto closing of the Strait of Hormuz by Iran, which set up a global crisis. But this will not work as Iran is very resilient. Stephen Collinson, in his excellent article “Trump is betting his blockade will defy history and break Iran,” CNN, had argued that: ²⁹⁴

Trump’s bullishness will confront two questions that will decide the fate of his latest strategy in a war that has often seemed to lack a rationale or endgame. The first is how long Trump, his fellow Republicans, and the American people can take the rising costs of the war, including \$4-plus gasoline and a rise in inflation. Midterm election voters are already angry at the prohibitive costs and Trump’s economy. The second question is whether the plan is based on realistic intelligence about conditions in Iran and sound reasoning on how its leaders might react. There is, after all, a long and dubious tendency in Washington to apply American logic to Middle Eastern societies that don’t react as US presidents expect. The president is betting that Iran’s leaders, in a radical Islamic theocracy with a record of inflicting extraordinary pain on its own people, will react purely on economic motives — as perhaps he might in their shoes....Alex Vatanka, a senior fellow at the Middle East Institute, argued the blockade could wreak severe economic pain that could translate into uncontrollable political opposition. But he added a critical caveat: This could take months. “The first thing to remember is that we’ve never been here before; this is uncharted territory,” Vatanka said. “The blockade is nothing Iran’s ever experienced, not even during the Iran-Iraq war,” Vatanka said. He could foresee a time when millions of workers would potentially come onto the streets and demand relief. “That is where the regime will be tested in ways it hasn’t been tested before — it doesn’t mean it can’t prevail, relying on repression. ... But it’s going to be a question of whether they can overcome the volume of anger.” Vatanka warned, however, that the potential for economic collapse to spark political change would rely on a level of organization in anti-regime protests and regime defections that are yet to materialize in Iran. Trump might not have time to wait for the counter-revolution. His approval ratings are at historic lows, and Republicans fear losing the House and facing an uphill fight to cling to the Senate in November. The longer the war goes on, and Iran keeps the Strait of Hormuz closed, the greater the damage to the US. Trump’s personal psychology may also play a role. He seems fixated on his legacy as he dreams of grand architectural works in his last 1,000 days in office. Nothing would be more shameful for a man who sees himself as one of life’s ultimate winners than being branded a loser in a war with Iran. One day, Trump may not TACO. How the blockade might fail. Yet even if Trump vows to go long, there’s always a chance that the blockade strategy is simply flawed. If the killing of Iran’s Supreme Leader Ali Khamenei didn’t cause Iran to quit and weeks of relentless bombing didn’t break the resolve of its leaders, is there reason to think an economic crisis might? The Islamic Republic’s persistence and stubbornness have become legendary. Iran has labored under Western sanctions for decades. It endured a horrendous eight-year war with an estimated 1 million casualties against Iraq in the 1980s. Every time protesters threatened to reach a critical mass, the regime sent its thugs on the streets to massacre civilians to save the revolution. The regime’s entire ethos in the 47 years since the Islamic Revolution has been resistance to the US “Great Satan.” It might choose societal collapse over caving into Trump. Trita Parsi, executive vice president of the Quincy Institute for Responsible Statecraft, said that Trump’s team was

the latest US administration to believe, wrongly, that a pressure campaign could force Iran to give in. "There is that constant search for that silver bullet, that one point of pressure that causes the Iranians to either collapse, capitulate, or just mend themselves to America's wishes," Parsi said. "And almost every time the US goes down that path, it ends up disappointing itself." Trump's confidence also reflects another familiar Washington trend — a never-reconciled belief, especially prevalent among conservatives, that the Iranian economy and regime are perpetually about to collapse. "They must cry uncle, that's all they must. Just say, 'We give up, we give up,'" the president said in the Oval Office on Wednesday. If Iran does so, Trump could break a futile cycle of history and finally end America's half-century duel with a bitter enemy. If it fails, he will only have proved yet again that the Islamic Republic's willingness to take punch after punch can neuter far greater American power.

One unintended consequence of the US-Israeli war with Iran is that instead of collapsing, the Islamic regime has become more embedded. Fergal Keane, "Some Iranians fear the regime is now more entrenched - and ready for revenge," BBC News, May 4, 2026, explains that.²⁹⁵

Protests have come and gone. A war. Then a ceasefire. But the regime of the Islamic Republic has endured. Iran's late Supreme Leader Ayatollah Ali Khamenei was succeeded by his son Mojtaba. It is impossible to tell the scale of support for the regime across Iranian society. There are regular public displays of solidarity organized by its supporters. By contrast, opposition rallies are banned. Our trusted sources in Iran spoke with opposition activists, human rights lawyers, and independent journalists and found a mood of foreboding. There is a recurring fear: once the war is finally over, the state will escalate its campaign of internal repression. According to the Washington-based Human Rights Activists News Agency (HRANA), more than 53,000 people were arrested during the anti-regime protests last January, and before the outbreak of the war. Since the war began, many thousands more have been believed to have been detained. There has also been a record number of executions of political detainees - 21 people hanged during the war. It is the highest number in such a brief period for over 30 years. Nine of those hanged were connected to the January protests, 10 were for alleged membership of opposition groups, and two were accused of spying....Human rights activists reported four executions so far this year of people accused of links to the Mossad, Israel's foreign intelligence service. Independent journalists are among those who fear being targeted by accusations that they are helping the United States or Israel. There have been many arrests of people accused of sending material to foreign media seen as hostile to the state.

Trump said on May 5 he would briefly pause an operation to help escort ships through the Strait of Hormuz, citing "great progress" toward a comprehensive agreement with Iran as well as the "request of Pakistan and other Countries. "Based on the request of Pakistan and other countries, the tremendous Military Success that we have had during the campaign...Great Progress has been made toward a Complete and Final Agreement with Representatives of Iran." He wrote on Truth Social. "We have mutually agreed that, while the Blockade will remain in full force and effect, Project Freedom ... will be paused for a short period of time to see whether or not the Agreement can be finalized and signed."²⁹⁶

Shortly after Trump's post, US crude oil futures fell \$2.30 and broke below \$100 per barrel, a much-watched threshold since the conflict sent energy prices soaring two months ago. Rubio and other senior administration officials said earlier on May 5 that Iran could not be allowed to control traffic through the strait. Iran had effectively sealed off the strait by threatening to deploy mines, drones, missiles, and fast-attack craft. The US has countered by blockading Iranian ports and mounting escorted transits for commercial vessels. The US military said on May 4 it had destroyed several Iranian small boats, as well as cruise missiles and drones.

The war has killed thousands of civilians in Iran and Lebanon and has spread to the rest of the Gulf, roiling the global economy. The head of the IMF said that even if the conflict ended at once, it would take three to four months to deal with the consequences.

Rubio said 10 civilian sailors were among those who had died in the conflict, adding that crew on vessels stranded in the waterway were "starving" and "isolated."

Trump said that Iran's military had been reduced to firing "peashooters" and Tehran wanted peace, despite public posturing. He also said that the US-Israeli attacks aimed to end what he claimed were "imminent threats from Iran", citing its nuclear and ballistic missile programs and its support for Hamas and Hezbollah.

Meanwhile, diplomatic efforts to end the conflict have yet to yield results. US and Iranian officials have held one round of face-to-face peace talks, but tries to set up further meetings have failed. Iranian Foreign Minister Abbas Araghchi has said that peace talks were still progressing with Pakistan's mediation.

He arrived in Beijing on May 6, in the morning , for talks with his Chinese counterpart on bilateral ties and regional and international developments.

Amazingly, Rubio said that the US had achieved its goals in its military campaign, which was launched on February 28 alongside Israel. "Operation Epic Fury is concluded," Rubio said. "We're not cheering for an additional situation to occur." One of Trump's central aims in launching military strikes against Iran was to ensure Tehran does not develop a nuclear weapon, something Tehran has repeatedly denied seeking throughout years of accusations to the contrary, especially from Israel.

US Defence Secretary Pete Hegseth said earlier on May 5 that the US had successfully secured a path through the waterway and that hundreds of commercial ships were lining up to pass through. The four-week-old truce with Iran was not over, he added. "Right now, the ceasefire certainly holds, but we're going to be watching very, very closely," he said.

General Dan Caine, chair of the US Joint Chiefs of Staff, said Iranian attacks against US forces fell "below the threshold of restarting major combat operations at this point".

Asked what Iran would need to do to violate the ceasefire, Trump said: "They know what not to do."²⁹⁷

Meanwhile, the UAE said its air defenses were again dealing with missile and drone attacks coming from Iran, though Iran's joint military command denied conducting attacks.

The UAE said the attacks were a serious escalation and posed a direct threat to the country's security, adding that the Gulf Arab state reserved its "full and legitimate right" to respond.

Iran rejected Abu Dhabi's statements, saying its armed forces' actions have been solely aimed at repelling American aggression.²⁹⁸

Oil prices fell for a second day on expectations that bottled-up supply from the key Middle East producing region could resume flowing after Trump showed a peace deal may be reached to end the war with Iran. Brent crude futures fell \$1.89, or 1.7%, to \$107.98 a barrel as of 0340 GMT, after dropping 4% in the earlier session. US West Texas Intermediate futures eased \$1.83, or 1.8%, to \$100.44, after settling down 3.9% the day before.

On May 5, Trump unexpectedly said he would briefly pause an operation to help escort ships through the Strait of Hormuz, citing progress toward a comprehensive agreement with Iran, without giving details on the agreement. This signaled potential de-escalation and raised hopes for the release of stranded vessels inside the Gulf, which could gradually bring supply back to the market. Prices are still elevated with both Brent and WTI staying above \$100 per barrel as prospects for a peace deal remain uncertain, while it would take time for trade flows to be fully restored even if a deal is reached.

Trump said the US Navy would continue its blockade of Iranian ports. The supply loss to the global market has pushed prices higher, with Brent trading last week at its highest since March 2022.²⁹⁹

"We have mutually agreed that, while the Blockade will remain in full force and effect, Project Freedom ... will be paused for a short period of time to see whether or not the Agreement can be finalized and signed," Trump wrote on social media.

US Secretary of State Rubio announced that the US would escort stranded tankers through the Strait. On May 4, the US military said it had destroyed several Iranian small boats, as well as cruise missiles and drones, while guiding two vessels out of the Gulf through the strait. The Strait of Hormuz closure has drawn down global inventories as refineries try to make up the production shortfall. US crude oil inventories fell for a third week, while gasoline and distillate stocks also declined. Crude stocks fell by 8.1 million barrels in the week ended May 1, the sources said. Gasoline inventories fell by 6.1 million barrels, while distillate inventories fell by 4.6 million barrels compared to a week earlier.³⁰⁰

When the cease-fire in the war with Iran went into effect a month ago, President Trump was pretty direct that if the Iranians failed to end their nuclear program or to reopen the Strait of Hormuz, the bombers would be back in the air. "If there's no deal, fighting resumes," he said, making it noticeably clear this was just a pause.

In a perplexing statement, Secretary of State Rubio said that the war ended at some point after the cease-fire took hold. "The Operation Epic Fury is concluded," he said. "We achieved the objective of that operation." The effort to reopen the strait, Rubio said, was entirely a

defensive and humanitarian operation that would result in direct military exchanges with the Iranians only if US ships came under fire.

On May 5, Trump announced that he was pausing even that effort, which was only one day old, and had succeeded in getting just a few ships freed, “for a short period of time,” citing what he said was “great progress” toward an agreement with Iran. But he kept the American blockade in place, part of a strategy of maximum economic pressure.³⁰¹

Meanwhile, quiet diplomacy continued. On May 6, the US and Iran were closing in on a one-page memo to end their war.³⁰²

Ishaan Tharoor, “How the Iran war is shifting power towards China,” *The New Yorker*, May 6, 2026, said that:³⁰³

Last week, the German Chancellor, Friedrich Merz, offered a gloomy appraisal of the war in Iran, a two-month-long conflict that has devolved into a standoff in the Persian Gulf. A ceasefire is now in place, but it’s fragile: the U.S. has blockaded Iranian ports and vessels; Iran has attempted strikes on U.S. ships; and, in the midst of negotiations over the Strait of Hormuz, President Donald Trump is reportedly considering whether to resume hostilities. “The Iranians are clearly stronger than expected, and the Americans clearly have no truly convincing strategy in the negotiations, either. . . . An entire nation is being humiliated by the Iranian leadership,” Mertz said—a notable shift from his cautious support for regime change in Iran. Trump fired back, vowing to withdraw U.S. forces that have been stationed in Germany for decades. The episode fits a pattern that has played out in Europe and the Middle East, wherein Trump makes new threats, punishes perceived slights, and shows little regard for allies or for the broader fallout from his decisions. His actions have made an impression at home, too: for the first time in more than two decades of polling on the question, the Pew Research Center recently found that a majority of Americans believe their country largely ignores the interests of others. This is all welcome news in Beijing. For years, the Chinese Communist Party has tried, with middling success, to cast itself as a responsible world power in the face of what it has labelled imperialist America. It has issued one jargon-filled statement after another warning against American “hegemony,” condemning Washington’s “Cold War mentality,” and framing China as the true custodian of a rules-based international order—the same order that the U.S. helped build but now undermines. But the war has offered an upside: Asian countries, which are far more dependent than the U.S. on the fossil fuels coming across the Strait of Hormuz, now have a fresh urgency to insulate themselves from future oil shocks and expand their renewable-energy capacity. China already dominates green-energy supply chains, and its exporters of solar systems, batteries, and electric vehicles all posted record sales in March....China has also received help from the Iran war simply by sitting on the sidelines. It has watched the Trump Administration move major military assets from Asia to the Middle East—redeploying air-defense systems over the objection of South Korea’s President. In just weeks, the United States burned through an arsenal of critical munitions, including stockpiles of Patriot, Tomahawk, and stealth cruise missiles, and of THAAD interceptors. For U.S. partners in the Pacific, these moves deepen the sense of a waning Pax Americana and could reshape their long-term calculations on how to hedge against China...The war has exposed other vulnerabilities, too. U.S. struggles against Iran, a weaker opponent—and its inability to

neutralize Iran's cheap drone campaign in the Gulf—have cast doubt on any prospect of sustained U.S. military dominance in Asia. Beijing has also gained a front-row seat to new U.S. methods of warfighting, specifically its widespread use of unmanned and autonomous weapon systems. ...The war with Iran—or its uneasy aftermath, should there somehow be a diplomatic breakthrough in the coming days—will loom over Trump's upcoming summit with Xi, in Beijing. The meeting, initially planned for March, was delayed by the war. The situation has only intensified since, in a bid to put more pressure on both Tehran and Beijing, the Trump Administration placed sanctions on several Chinese oil refineries and forty Chinese-linked shipping firms and vessels involved in trade with Iran. China, meanwhile, laid out new rules that could penalize foreign companies trying to shift from China-based supply chains. The project of "de-risking" from China—encouraged by both President Joe Biden and Trump—had been embraced by various countries in the West, but seems more complicated in Trump's second term, as those same countries now feel the need to hedge against the U.S., too. It's another tacit victory for Beijing, whose own soft power is growing just by existing in contrast to Trump's wrecking-ball politics. "The more that U.S. allies and partners undertake to de-risk from Washington, the less diplomatic capital Beijing has to expend on assuaging their misgivings about its own conduct." ...China, too, may be in a more conciliatory mood. Its leadership wants to see de-escalation in the Gulf and an end to the blockade that is inflicting real damage on Asian economies, including its own—and the country isn't aggressively propping up Iran's war effort or trying to supplant the U.S. in the Middle East. Instead, China has helped nudge Iran toward negotiations with the U.S. and encouraged Pakistan, a neighbor and close partner, to play the role of intermediary. The war also illustrates the limits of Chinese power. For decades, Beijing relied on U.S.-provided security architecture in the Middle East as it powered its economy on Gulf energy imports. Now it can do little to check U.S. military action in the region, and Xi's call to open the Strait of Hormuz went unheeded. His stoic image may get a boost every time Trump posts a new absurdity on social media, but China is still in America's geopolitical shadow.

On May 6, Iranian Foreign Minister Araqchi met China's top diplomat in Beijing on Wednesday, underscoring close ties between the two countries shortly before Trump was scheduled to travel to meet with Xi Jinping.

Araqchi's visit was his first trip to China since the US-Israeli war on Iran set off the most severe global oil supply shock in history, threatening the energy security of China, the world's top crude importer. After the meeting, Iran's foreign ministry said that Araqchi briefed Foreign Minister Wang Yi on the talks with the U.S. and said: "Iran, just as it demonstrated strength in defending itself and remains fully prepared to confront any aggression, is also serious and steadfast in the field of diplomacy."

"We will do our best to protect our legitimate rights and interests in the negotiations," Araqchi said. "We only accept a fair and comprehensive agreement," he added, about talks between Tehran and Washington.

The Chinese foreign ministry said after the talks that "the current regional situation is at a critical juncture of transition from war to peace," adding that "China believes that a complete cessation of hostilities is imperative, restarting the conflict is unacceptable, and persisting in negotiations is particularly important."³⁰⁴

It also urged the "parties involved" to promptly restore "normal and safe passage" through the Strait of Hormuz. On the nuclear issue, it said that "China appreciates Iran's commitment not to develop nuclear weapons, while also recognizing Iran's legitimate right to the peaceful use of nuclear energy."

Earlier, US Treasury Secretary Bessent had urged China to intensify its diplomatic efforts to persuade Iran to open the strait to international shipping. Bessent said Trump and Xi would exchange views on Iran in person during their May 14 to 15 talks in Beijing. He added that the two will seek to keep the U.S.-China relationship on track following a trade truce in October. Bessent urged China to "join us in this international operation" to open the strait, but did not specify what actions Beijing should take. He added that China and Russia should stop blocking initiatives at the UN, including a resolution encouraging steps to protect commercial shipping in the strait.

Earlier, the US and Iran launched new attacks in the Gulf as they wrestled for control over the strait with dueling maritime blockades, threatening what was already a fragile truce. Trump later said the U.S. Navy would help ships pass through the strait. But that operation was paused after Trump said there had been "great progress" made toward a comprehensive agreement with Iran.

Meanwhile, China had engaged in a flurry of diplomatic activity and refrained from forceful criticism of the US's conduct of the war so that the summit, already postponed once by the conflict, could go smoothly.³⁰⁵

On May 6, the Trump administration believed it was getting close to an agreement with Iran on a one-page Memorandum of Understanding (MoU) to end the war and set a framework for more detailed nuclear negotiations, *Axios* reported on Wednesday, citing two US officials.

In its current form, the MoU would declare an end to the war in the region and the start of 30 days of negotiations on a detailed agreement to open the strait, limit Iran's nuclear program with a moratorium, and lift US sanctions.

Iran's restrictions on shipping through the Strait and the US naval blockade of Iran would be gradually lifted during those 30 days.

Earlier, Trump announced a pause to "Project Freedom", a mission announced on Sunday to guide ships through the blocked strait. The mission had failed to bring about any significant resumption of traffic through the waterway, while provoking a new wave of Iranian strikes on ships in the strait and on targets in neighboring countries. Iran denied that any crossings had

taken place. Also, it said that their forces did not conduct missile or drone operations against the UAE in recent days.

In a positive development, Trump said on Tuesday he would briefly pause an operation to help escort ships through the Strait of Hormuz, citing "great progress" toward a comprehensive agreement with Iran as well as the "request of Pakistan and other Countries."

"Based on the request of Pakistan and other countries, the tremendous Military Success that we have had during the campaign...Great Progress has been made toward a Complete and Final Agreement with Representatives of Iran." He wrote on Truth Social. "We have mutually agreed that, while the Blockade will remain in full force and effect, Project Freedom ... will be paused for a short period of time to see whether or not the Agreement can be finalized and signed."

Meanwhile, Prime Minister Sharif extended his gratitude to Trump in a post on X for "his courageous leadership and timely announcement regarding the pause in Project Freedom in the Strait of Hormuz."

He also mentioned the requests of other brotherly countries, particularly Saudi Arabia, and then reaffirmed Pakistan's commitment to supporting all efforts that promote restraint and peaceful conflict resolution.

Shortly after Trump's post, US crude oil futures fell \$2.30 and broke below \$100 per barrel, a much-watched threshold since the conflict sent energy prices soaring two months ago.

Rubio said earlier that Iran could not be allowed to control traffic through the strait. Iran had effectively sealed off the strait by vowing to deploy mines, drones, missiles, and fast-attack craft. The US had countered by blockading Iranian ports and mounting escorted transits for commercial vessels.

The US military said it had destroyed several Iranian small boats, as well as cruise missiles and drones.

Meanwhile, Iran continued to show defiance of US and Israeli aggressions. Iranian President Pezeshkian asserted that the Iranian nation will never submit to threats, telling US officials to end the military threats against the region.

As expected, Beijing extended support to Iran amid conflict with the US ahead of Trump's China trip. "China supports Iran in safeguarding its national sovereignty and security and appreciates Iran's willingness to seek a political solution through diplomatic channels," Foreign Minister Yi told his Iranian counterpart Araghchi during a meeting in Beijing. He added that a complete cessation of hostilities "is imperative," while restarting the conflict "is unacceptable, and persisting in negotiations is particularly important. Foreign Minister Yi said the US-Israel war on Iran was illegitimate. Araghchi reached Beijing at China's invitation for their first in-person talks since the US and Israel started war with Iran on February 28.

As of May 6, the war had killed thousands of civilians in Iran and Lebanon and had spread to the rest of the Gulf, roiling the global economy. The head of the IMF said that even if the conflict ended at once, it would take three to four months to deal with the consequences.

Trump again criticized Iran and claimed that Iran's military had been reduced to firing "peashooters" and Tehran wanted peace, despite public posturing. He reiterated his stance and said the US-Israeli attacks aimed to end what he claimed were "imminent threats from Iran", citing its nuclear and ballistic missile programs and its support for Hamas and Hezbollah.

Iran had called out the attacks as a violation of its sovereignty and said that it has the right to develop nuclear technology for peaceful purposes, including enrichment, as a party to the Nuclear Non-Proliferation Treaty.

Diplomatic efforts to end the conflict have yet to yield results. US and Iranian officials have held one round of face-to-face peace talks, but tries to set up further meetings have failed.

Meanwhile, the UAE said its air defenses were again dealing with missile and drone attacks coming from Iran, though Iran's joint military command denied conducting attacks. The UAE's foreign ministry said the attacks were a serious escalation and posed a direct threat to the country's security, adding that the Gulf Arab state reserved its "full and legitimate right" to respond. Iran rejected Abu Dhabi's statements, saying its armed forces' actions have been solely aimed at repelling American aggression.³⁰⁶

Most importantly, Iranian Foreign Minister Araghchi had said that peace talks were still progressing with Pakistan's mediation. A one-page, 14-point Memorandum of Understanding (MoU) was being negotiated between U.S. envoys Witkoff and Kushner and several Iranian officials, both directly and through mediators. In its current form, the MoU would declare an end to the war in the region and the start of 30 days of negotiations on a detailed agreement to open the strait, limit Iran's nuclear program, and lift US sanctions. Iran's restrictions on shipping through the Strait and the US naval blockade of Iran would be gradually lifted during those 30 days.

Earlier, Trump announced a pause to "Project Freedom", a mission he announced to guide ships through the blocked strait. The mission had failed to bring about any significant resumption of traffic through the waterway, while provoking a new wave of Iranian strikes on ships in the strait and on targets in neighboring countries.

The plan had three at once actionable points: the lifting of the US blockade on Iranian ships and ports, the opening of the strait to commercial traffic, and an end to the fighting. The major points of conflict that have so far stymied negotiations would be left to be sorted out in the next 30 days. Those include, crucially, the future of Iran's nuclear program, sanctions relief for the country, and the release of Iranian funds frozen overseas. Tehran would agree to never seek a nuclear weapon and would agree to suspend enrichment of uranium, but the details, including the duration of that pause, are unresolved.

Meanwhile, on May 9, Iran claimed that an American attack had struck six vessels in the country's Khasab port, leaving six people missing. There was no American confirmation of that attack. As tensions rose between the US and Iran, other countries appeared to be taking steps to address the crisis in the Strait of Hormuz, which has driven up energy prices and jolted markets around the world, with dire consequences for the global economy.

Britain and France had said they were planning a “multinational coalition” to ensure safe passage for ships in the strait once the conflict ends, though there has been little detail of what that would entail.

Meanwhile, one Qatar-owned gas tanker was trying to pass through the Strait of Hormuz on the Iranian side, going to Pakistan. If the tanker were to make it through, it would be the first Qatari natural gas tanker to do so since the beginning of the war. In normal times, about 130 vessels passed through the strait each day, carrying, among other things, about a fifth of the world’s oil supply. It is also a crucial passage for ships carrying natural gas, fertilizer, and other products.³⁰⁷

Traffic in the Strait of Hormuz remained throttled on May 9, after naval skirmishes between U.S. and Iranian forces in recent days heightened tensions in the vital shipping route. For weeks, the narrow passage between the Persian Gulf and the Arabian Sea had been choked by two competing blockades enforced by each side in the conflict. About 1,600 ships are bottled up in the Persian Gulf. Since April 13, the US Navy has intercepted and turned around 58 commercial ships that were either leaving or trying to enter Iranian ports, and American forces have “disabled” four other ships that did not comply with American orders, Central Command announced on May 9.

In public statements, the United States and Iran continued to trade threats on May 9. Iran’s Revolutionary Guards Navy said that any attack on Iranian vessels would be met with a “heavy assault” on American ships and other U.S. targets in the region. Trump posted a meme of Iranian warships that had been sunk to the bottom of the ocean.

At least six cargo ships had crossed the Strait of Hormuz, but no tankers. The number of ships passing through the narrows each day has decreased, from an already low level. Traffic had plunged in recent days, even compared to some other periods during the cease-fire, which started on April 7.

There was a new round of skirmishes in the strait. The United States said it struck military sites in Iran after Iran attacked three American destroyers. The US military said that it had fired on two Iranian-flagged oil tankers, disabling them as they tried to reach an Iranian port. Iran, for its part, said it had attacked the American warships on Thursday in retaliation for what it described as American cease-fire violations, including strikes on the country’s southern coast. Iranian forces kept up their efforts, seizing a Chinese-owned oil tanker in the strait.³⁰⁸

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Britain on May 9 said the Royal Navy was deploying a destroyer ship to the Middle East in what it described as “pre-positioning” for a future mission to secure the Strait. Britain and France have said they are planning a “multinational coalition” to ensure safe passage for ships in the

strait once the conflict ends, though there has been little detail on what that would entail. In normal times, about 130 vessels passed through the strait each day.³⁰⁹

Meanwhile, a ceasefire in the Iran war came into effect in April. It was meant to help talks to end the war and has been observed, despite occasional exchanges of fire. Iran had continued to block the strategic Strait of Hormuz, prompting a rise in world oil prices. The US, for its part, had been enforcing a blockade of Iranian ports to exert pressure on Tehran to agree to its terms. As expected, the move has infuriated Iran. The peace talks had stalled for now, with each side blaming the other.

Pakistan had been playing a significant role in quiet diplomacy between Tehran and Washington ever since it helped broker a ceasefire on April 8, bringing an end to 40 days of military confrontation involving the United States and Israel against Iran. Although follow-up talks held in Islamabad days later did not produce a formal breakthrough, diplomatic contacts never completely stopped. Since then, backchannel engagements have continued quietly, involving multiple regional and international stakeholders.

Finally, Iran formally conveyed its long-awaited response to Pakistan, amid a flurry of behind-the-scenes diplomatic engagements that signaled a renewed momentum for a negotiated settlement.

On May 10, Tehran presented its official response to the latest American proposal in the negotiations to end the war, providing few details on the content of the reply. It said that “the current phase of negotiations” with the United States “focused exclusively on the cessation of hostilities.” Iran sent its position to officials in Pakistan, which mediated the current truce and hosted senior U.S. and Iranian officials for talks in April.

The US and Iran were working on a short-term agreement to end hostilities for another 30 days and reopen the Strait of Hormuz, which Iran has blockaded. During the 30 days, the US and Iran would try to reach a comprehensive deal.³¹⁰

For Iran’s rulers, one complication is the absence of their supreme leader, Mojtaba Khamenei, who has been out of the public eye since he was reportedly injured in the attack that killed his father early in the war. Earlier, supreme leaders had final say on important national security matters.³¹¹

Trump on May 10 rejected Iran's long-awaited response conveyed through Pakistan to Washington's proposals for ending the ongoing conflict in the Middle East, saying that he considered it "totally unacceptable". “Just read the response from Iran's so-called 'Representatives.' I don't like it -- TOTALLY UNACCEPTABLE!” Trump posted on his Truth Social platform, without describing elements of Tehran's response.³¹²

US media reports previously suggested that Washington had floated a brief "one-page memo" outlining a broader framework for future negotiations. The proposal focused on immediate de-escalation measures while leaving more contentious political and security issues for later stages.

Pakistan had earlier expressed optimism that an understanding between Tehran and Washington could be reached "sooner rather than later." While Islamabad remained at the forefront of mediation efforts, regional players, particularly Qatar and Saudi Arabia, had increasingly complemented Pakistan's diplomatic push.

Meanwhile, Iranian President Pezeshkian reaffirmed his country's uncompromising stance, saying that any dialogue or negotiations would not amount to surrender or retreat, and vowing that Tehran would "never bow to the enemy." The long-awaited answer came as Netanyahu insisted the conflict was not over until Iran's enriched uranium was removed and its nuclear facilities dismantled.

"We will never bow down to the enemy, and if there is talk of dialogue or negotiation, it does not mean surrender or retreat," Iranian President Pezeshkian said.

In a significant development on May 10, Qatari Foreign Minister Al Thani held a telephone conversation with Prime Minister Sharif to discuss the evolving regional situation and ongoing peace efforts. The Qatari outreach came shortly after he visited the US, where he met Vice President Vance and later travelled to Miami for discussions with Witkoff, as well as US Secretary of State Rubio. The meetings focused extensively on the Iran crisis and pathways towards a political settlement. Interestingly, Al Thani had also spoken to Pakistan's premier Sharif before embarking on his US trip, underlining the close coordination between Islamabad and Doha on regional diplomacy. Separately, the Qatari leader also held a telephonic conversation with Iranian Foreign Minister Araghchi, adding another layer to the ongoing mediation efforts.

Most importantly, the intensity of these diplomatic contacts suggested a growing regional consensus that the conflict could no longer be managed through military means alone and that a political solution was urgently needed to avoid wider regional destabilization. The question remained whether the coming days could prove crucial in deciding whether the latest round of mediation succeeds in creating enough trust between Tehran and Washington to move towards structured negotiations after weeks of intense confrontation.³¹³

Iran said on May 11 that it had called for an end to the war across the region and the release of frozen assets abroad in its response to the latest US proposal. "We did not demand any concessions. The only thing we demanded was Iran's legitimate rights," said ministry spokesperson Baqaei. He said Iran's demands included "an end to the war in the region," ending the US naval blockade, and the "release of assets belonging to the Iranian people, which have for years been unjustly trapped in foreign banks."

Iran also claimed that the US continues to have "unreasonable demands," adding that Iran's response to the US proposal, which Tehran sent to Pakistan on May 10, "was not excessive". Trump slammed Iran's response to Washington's peace proposal as "totally unacceptable."³¹⁴

Meanwhile, Israel's bombardment of Lebanon continues as Hezbollah claims more attacks on Israeli troops. Israeli attacks on May 10 and May 11 have killed 51 people, including two medical workers.³¹⁵

Despite heavy losses, the Iranian regime is intact. It has shown remarkable resilience in the face of Israeli and US aggression. As expected, when faced with foreign aggression, nations unite, a phenomenon called the rallying around the flag phenomenon, which occurred in Iran as well, and has galvanized the Iranian nation.

A harsh reality is taking shape in the region. The editorial "New regional order," Dawn, May 11, 2026, explains it well. It argued that:³¹⁶

Many of the Arab states must also be reflecting on a harsh reality: the multibillion-dollar American security umbrella could not protect them from the barrage of Iranian missiles. The fact is that the US has only one true security commitment in the Middle East — Israel. All other alliances are clearly transactional and expendable. Yet despite these bitter truths, some Gulf states have decided to double down and deepen ties with the US and Israel. They are betting on the wrong horse. The age of the foreign imperial protector is over. Sovereign states must make their own decisions and construct mutually beneficial security architecture. In this regard, Iran, the Gulf states, Turkiye, and the wider Arab and Muslim fraternity of nations, including Pakistan, must come together to manage their own affairs and resolve internal disputes amongst themselves in an amicable manner. Pakistan has played an admirable role in trying to bring the US and Iran to the peace table, while the Saudis and Iranians have also kept channels of communication throughout the war. These processes must be taken forward. Depending on outsiders for security is a bad idea. Moreover, giving Israel a foothold in the region is a surefire recipe for disaster. The Zionist state thrives on the dictum of divide and rule and hopes to devour even more Muslim and Arab land. It must not be allowed to create more regional chaos.

On May 23, Trump said that a Memorandum of Understanding (MoU) on a peace deal with Iran is "largely negotiated," as both countries and mediators in Pakistan reported progress. He said that further said the emerging agreement would reopen the Strait of Hormuz. Trump did not say what else would be included in an agreement. "Final aspects and details of the Deal are currently being discussed, and will be announced shortly," Trump said.³¹⁷

Iran had said on May 23 that it was working toward a memorandum of understanding laying out an approach to ending the war after its top officials met with Munir, the strongman of Pakistan. Pakistan said the negotiations had resulted in "encouraging" progress towards a final understanding. Two Pakistani sources involved in negotiations said the deal being negotiated is "fairly comprehensive to terminate the war."³¹⁸

On May 23, Trump said that he expected to decide on May 24 whether to resume attacks on Iran. "Either we reach a good deal, or I'll blow them to a thousand hells," Trump said. He had a phone call on May 23 with leaders from Saudi Arabia, Qatar, the United Arab Emirates, Jordan, Egypt, Turkey, and Pakistan.³¹⁹

Pakistan's strong man, Munir, left Tehran on May 23 after talks with Iran's top negotiator Qalibaf and Foreign Minister Araqchi. Pakistan had aimed to narrow differences between Iran and the US after weeks of war had left the vital Hormuz waterway closed to most shipping despite a fragile ceasefire.

US Secretary of State Rubio, on May 23, reiterated Trump's terms for ending the fighting. "Iran can never have a nuclear weapon. The straits need to be open without tolls. They need to turn over their enriched uranium. "Rubio said some progress had been made and work was continuing. "Even as I speak to you now, there is some work being done. There is a chance that, whether it is later today, tomorrow, or in a couple of days, we may have something to say," Rubio said.³²⁰

Iran denies it is pursuing nuclear weapons and says it has a right to enrich uranium for civilian purposes. It has demanded supervision of the strait, an end to the US blockade on its ports, and the lifting of sanctions on Iranian oil sales.

"The trend this week has been towards a reduction in disputes, but there are still issues that need to be discussed through mediators. We will have to wait and see where the situation ends in the next three or four days," said Iranian Foreign Ministry spokesperson Bagheri. He further said the issue of the US blockade on Iran's shipping was important, but that its priority was ending the threat of new US attacks and the ongoing conflict in Lebanon, where Iran-allied Hezbollah militants are fighting Israeli troops who have moved into the south.

Iran stated that it would pursue its "legitimate rights," both on the battlefield and through diplomacy, but added that it could not trust "a party that has no honesty at all," an allegation Iran has made several times before. Iran's armed forces had rebuilt their capabilities during the ceasefire, and if the U.S. "foolishly restarts the war," the consequences would be "more forceful and bitter" than at the start of the conflict.

Despite weeks of conflict, Iran had preserved its stockpile of near-weapons-grade enriched uranium as well as missile, drone, and proxy capabilities.³²¹

A serious dispute between the US and Iran was about the control of the Strait of Hormuz. Tehran claimed that it had the legal right to manage the Strait of Hormuz, though it was not clear if that meant continuing to decide which ships can go through. The IRGC said 33 vessels had passed through the strait over the past 24 hours after getting permission from Tehran, still far short of the 140 on a typical day before the war.³²²

On May 25, two liquefied natural gas tankers are exiting the Strait of Hormuz, heading to Pakistan and China, while a supertanker with Iraqi crude for China left the Gulf on May 24 after being stranded for three months.³²³

The vessels were among a handful of supertankers exiting the Gulf this month via a transit route that Iran has ordered ships to use. Last week, three Very Large Crude Carriers (VLCCs) made their way to China and South Korea with 6 million barrels of crude. Before the war began, shipping traffic through the strait averaged 125 to 140 daily passages. Some 20,000 seafarers remain stranded inside the Gulf on board hundreds of ships.³²⁴ Any deal reinforcing the current fragile ceasefire would bring relief to markets but not immediately quell a global energy crisis, which has driven up the costs of fuel, fertilizer, and food. Even if the war ends now, full flow through the strait will not return before the first or second quarter of 2027.³²⁵

On May 26, Rubio said that negotiating a deal with Iran could "take a few days," quashing hopes for an imminent end to the conflict a day after US forces conducted what it called defensive strikes in southern Iran. Describing the strikes, Rubio said: "The straits have to be open, they're going to be open one way or the other, so they need to be open."³²⁶

Rubio said earlier that the U.S. would give diplomacy every chance to succeed before considering whether to deal with Iran in "another way." He said there was a "pretty solid thing on the table," referring to talks over reopening the strait and a "very real, significant, time-limited negotiation on nuclear matters."³²⁷

In another sign of the region's tensions, Israeli Prime Minister Benjamin Netanyahu said on May 25 that Israel would intensify strikes against the Iran-backed Hezbollah militia in Lebanon. Israel's military soon thereafter said it was attacking Hezbollah infrastructure in Lebanon's eastern Bekaa Valley and other areas.³²⁸

Meanwhile, a tenuous ceasefire was still in place since April. The US-Israeli bombing of Iran killed thousands of people in Iran before it was suspended in early April. Israel has also killed thousands more and driven hundreds of thousands from their homes in Lebanon, which it invaded in pursuit of Hezbollah. Iranian strikes on Israel and neighboring Gulf states have killed dozens.³²⁹

Meanwhile, indirect negotiations continued between the US and Iran through Pakistan and Qatar intermediaries. By May 25, expectations had risen that a breakthrough might be imminent in the three-month-old war after Trump said an emerging agreement being brokered by Pakistan would reopen the Strait of Hormuz.³³⁰

There were now obvious signs of an agreement between the US and Iran. Vance, Witkoff, and Kushner had been involved in the talks, while the US was looking to include all regional allies in the process. Several Arab and Muslim looking, including officials from Saudi Arabia, Qatar, Egypt, Turkey, Pakistan, and the UAE, have backed the diplomatic effort.

Pakistan had played a central mediation role, with Field Marshal Munir travelling to Tehran to help complete the deal.³³¹

Earlier, on May 24, Trump and a group of Arab and Islamic leaders discussed regional developments in a joint telephone call. The leaders reviewed the latest regional developments and expressed appreciation for Trump's leadership and his commitment to consultation. The participants also acknowledged the mediation efforts led by Pakistan and Qatar.³³²

On May 25, the US and Iran were close to signing a 60-day ceasefire extension that would reopen the Strait of Hormuz, allowing Iran to resume oil sales and creating a window for negotiations on Tehran's nuclear program.

The agreement had not yet been signed and remained subject to final approval by Trump and Iran's Supreme Leader Khamenei, a process that could take several days.³³³

On May 25, Prime Minister Sharif said that Pakistan hopes to host the next round of US-Iran talks "very soon," as diplomatic efforts push toward an agreement. He pledged that Pakistan would continue its peace efforts "with utmost sincerity".³³⁴

Meanwhile, Foreign Minister Dar said a telephone call led by Trump with the Muslim leaders marked "a significant step closer toward the shared objective of regional peace, stability, and an early diplomatic outcome." Dar expressed appreciation for the "constructive engagement of the Iranian leadership" in advancing the peace process. He also acknowledged regional partners, including Saudi Arabia, Türkiye, Egypt, and Qatar, saying their support had "contributed meaningfully to this outcome."³³⁵

On May 25, Trump said that Washington and Iran had "largely negotiated" a Memorandum of Understanding (MoU) on a peace deal that would reopen the Strait of Hormuz, which has been effectively closed since the US and Israel launched their war on Iran in February.³³⁶

Under the draft MoU, Iran would clear mines from the Strait of Hormuz and allow ships to pass without tolls. In exchange, Washington would lift its blockade on Iranian ports and issue limited sanctions waivers allowing Tehran to sell oil freely for 60 days. US economic relief would follow concrete Iranian steps rather than be granted upfront.

The draft also included Iranian commitments not to pursue nuclear weapons and to negotiate suspending uranium enrichment and removing its stockpile of highly enriched uranium.

Any broader sanctions relief or unfreezing of Iranian funds would be discussed during the ceasefire period, but would only be implemented as part of a final, verified agreement. Further, US forces deployed to the region would remain in place during the 60 days and would withdraw only if a final deal is reached.³³⁷

The agreement also appears linked to efforts to end the war between Israel and Hezbollah in Lebanon.

Israeli Prime Minister Netanyahu raised concerns about that condition in a call on May 24 with Trump. Netanyahu told Trump Israel would still be allowed to act if Hezbollah tried to rearm or resume attacks in Lebanon. Trump reiterated and supported this principle.³³⁸

EC President Løyen, on May 25, welcomed progress toward an agreement between the US and Iran, stressing the need for a deal that would reduce tensions and prevent further escalation in the region.

She reiterated that Iran "must not be allowed to develop a nuclear weapon" and called on Tehran to end actions she described as "destabilizing in the region, directly or through proxies, as well as its unjustified and repeated attacks on its neighbors." "Europe will continue working with international partners to seize this moment for a lasting diplomatic solution. And to have the spillover of this conflict, notably on supply chains and energy prices," von der Løyen wrote.³³⁹

UK Prime Minister Starmer, on May 25, welcomed progress toward a potential agreement between the US and Iran, stressing the need for international efforts to secure a lasting diplomatic solution. He reiterated the UK's position that Iran "must never be allowed to develop a nuclear weapon" and said his government would continue efforts to protect British citizens from the impact of the conflict.³⁴⁰

The US and Iran agreed in principle to a deal that would reopen the Strait of Hormuz, in exchange for Tehran's commitment to dispose of its highly enriched uranium.

The method for disposing of Iran's highly enriched uranium was still being negotiated.

The proposed deal does not address Iran's missile stockpile nor include a moratorium on uranium enrichment. These issues were expected to be managed in future rounds of talks.

The US could consider "significant accommodations" on sanctions relief if Iran agreed to make similar concessions about its enriched uranium stockpile.

The US plan is to deal with all its stockpile of enriched material. The Trump administration sees Iran making "serious accommodations" not previously seen in earlier negotiations.³⁴¹

The US rejected the idea of any "tolling" mechanism for the Strait of Hormuz; such an arrangement would not be acceptable and had not been proposed by either side.

The Trump administration viewed the emerging agreement as stronger than the 2015 nuclear deal reached under former US President Barack Obama, which allowed uranium enrichment up to certain levels.

As part of the agreement, the US would lift its blockade on vessels entering and leaving Iranian ports. The Cento and Gulf partners would coordinate to ensure safe passage; this should not be viewed as a toll system.

Trump said on May 25 that a blockade on Iran would remain in "full force and effect" until a formal agreement on the nuclear issue is reached, certified, and signed. Trump said that negotiations with Iran were going ahead in an "orderly and constructive" manner, adding that he had instructed his representatives "not to rush into a deal," arguing that time was on their side.³⁴²

He stressed that both sides must take adequate time to ensure the agreement is correctly completed, warning that "there can be no mistakes" in the process.

Reiterating his administration's position, Trump said Iran must not be allowed to develop or buy a nuclear weapon, while also suggesting that relations between Washington and Tehran were becoming more "professional and productive."³⁴³

Iranian President Pezeshkian said on May 25 that Iran is ready to reassure the international community that it is not pursuing nuclear weapons or instability in the region.

“Before the martyrdom of Ayatollah (Ali) Khamenei, Iran’s late Leader, we declared --, and we reiterate now -- that we are ready to assure the world we do not seek nuclear weapons,” Pezeshkian said. “It is rather Tel Aviv that is driving regional instability,” he said, accusing Israel of pursuing a vision of “Greater Israel.” Iranian negotiators will never compromise on the country’s “honor and dignity,” added Pezeshkian.³⁴⁴

His remarks came a day after Trump said an agreement with Iran to end the war was “largely negotiated” and awaited finalization.

Earlier, Pezeshkian said that no decision will be made without the permission of Iran’s Supreme Leader, Mojtaba Khamenei, referring to the potential US-Iran deal.

“Any statement, analysis, or position that leads to division in society is, in effect, pouring water on the enemy’s damage,” he said. No decision in the country will be made outside the framework of the Supreme National Security Council and without the permission of the Supreme Leader. The administration of the country requires a single decision and collective obedience,” he added.³⁴⁵

Iran criticized the US again on May 25, and said that US obstruction had prevented the finalization of a differences-settlement framework, warning that if it continued, there would be no possibility of completing the MoU. It further said that it stays firm on securing its people's rights and has conveyed this position directly to the Pakistani mediator.³⁴⁶

The draft stipulates that the US and its allies will not attack Iran or its allies, and in return, Iran pledges not to launch preemptive attacks on them.

Trump made it clear that he will stand firm in negotiations on his consistent demand for the dismantling of the Iranian nuclear program and the removal of all enriched uranium from its territory, and that he will not sign a final agreement without these conditions being met.³⁴⁷

Iran reported that a potential memorandum of understanding (MoU) between Iran and the US includes an end to the war on all fronts.

This includes Israel's attacks in Lebanon, and Washington would also commit to waiving sanctions on Iran's oil during negotiations.

If the agreement is reached, the Strait of Hormuz will not fully return to its pre-war status; instead, the number of ships allowed to pass would be restored to pre-war levels within 30 days.

Iran emphasized the enforcement of its sovereign rights over the Strait of Hormuz through various means, the details of which will be announced later.³⁴⁸

Iran insisted on at least a partial release of its frozen assets, and a potential deal would also include a 60-day negotiation window on Iran's nuclear program. Tehran also calls for the lifting of the US blockade of its ports, arguing that no changes will be made in the strait if the blockade

stays in place. Any changes to navigation and transit through the strategic waterway will also depend on the implementation of the US's other commitments in the MoU.³⁴⁹

US Secretary of State Marco Rubio said on May 25 that progress has been made on an "outline" to open the Strait of Hormuz "without toll," but that would need "full Iranian acceptance and then compliance."

"Some progress has been made, significant progress, although no final progress has been made," Rubio said. On the Strait of Hormuz, Rubio said: "This is an international waterway. They don't own it. It's an international waterway."

Emphasizing a diplomatic solution, Rubio said the US has "made some progress" collaborating on the MoU with our partners in the Gulf region.

The outline, he added, "that could ultimately, if it succeeds, leave us not just with a completely open straits -- and I mean open straits without tolls -- and with addressing some of the key things that underpin what has been Iran's nuclear weapons ambitions in the past."

"Obviously," Rubio stressed, "that will require full Iranian acceptance and then compliance, and it will require some future work on negotiating the details."³⁵⁰

Trump held a phone call with regional leaders on May 24 to discuss ongoing indirect talks with Iran. According to him, an agreement was "largely negotiated" and awaited finalization.

"The ultimate goal is that Iran can never have a nuclear weapon. Iran can never have a nuclear weapon," Rubio said.

He said the Iranian nuclear program was a "highly technical" matter, one that would probably need to be addressed over some period of time."

The "preference" of the US is to address this through diplomatic means, and that's what we're trying to do here. I think we've made some progress. I'm always cautious when I say that because you can agree to things on paper," he said.

"But I do think perhaps there is the possibility that over the next few hours the world will get some good news, at least with regards to the straits," Rubio said. "Significant progress, although not final progress, has been made."³⁵¹

Iran, on May 25, accused US Secretary of State Rubio of "attempting" to "distort realities," rejecting his remarks on global energy markets and Tehran's nuclear program.

"Such allegations constitute a clear attempt to distort the realities of the region and to deflect attention from the destabilizing policies of the United States and the Zionist regime," Iran said.³⁵²

Rubio on May 24 said the US would not let Iran hold the energy market "hostage," and that Tehran can never have a nuclear weapon.

Iran said that:³⁵³

What has held the global energy market hostage over recent years has been the unlawful and unjust sanctions imposed by the United States on Iran's oil exports; sanctions that have been designed and enforced in violation of the principles of international law and the charter of the United Nations, to exert economic pressure on the Iranian nation....These two regimes (the US and Israel) are the principal drivers behind the escalation of global security and energy crises and seek to advance their political and military objectives through the creation of instability and insecurity.

About Rubio's remarks on Iran's nuclear program, Tehran recalled that:³⁵⁴

As a committed member of the Treaty on the Non-Proliferation of Nuclear Weapons, it has consistently declared that its nuclear program is entirely peaceful and stays under the supervision of the International Atomic Energy Agency (IAEA). The Islamic Republic of Iran considers the peaceful use of nuclear science and technology to be the legitimate and inalienable right of its people and emphasizes that it will never relinquish this lawful and internationally recognized right.

Surprisingly, Iran, in disagreement with the US, said on May 25 that Tehran had not agreed to hand over its highly enriched uranium stockpile. Iran's nuclear issue was not part of the preliminary agreement with the US.³⁵⁵

Various media in the US and Iran said the MoU that could yield an agreement lays out a phased framework for ending months of fighting, reopening the waterway soon, and lifting a US blockade on Iran. Plans for Iran's stockpile of enriched uranium, which Washington has insisted it give up, would be negotiated within 30 to 60 days.

Trump posted on social media that the emerging agreement would reopen the Strait of Hormuz. He did not say what else would be included in the agreement. "Final aspects and details of the Deal are currently being discussed, and will be announced shortly," Trump wrote on Truth Social.³⁵⁶

However, Iran disagreed with Trump and said on May 26 that the agreement would allow Iran to manage the strait and that his assertion on the strait was "inconsistent with reality."³⁵⁷

Trump, whose approval ratings have been hit by the war's impact on US energy prices and who has faced congressional efforts to curb his war powers, has repeatedly played up the prospect of an agreement to end the conflict.

As details of the possible agreement emerged over the weekend, critics, including former Secretary of State Pompeo and Democratic lawmakers, argued that it offered little beyond the 2015 Iran nuclear deal negotiated by former President Barack Obama, from which Trump withdrew during his first term.³⁵⁸

Hollen, a Democratic member of the Senate Foreign Relations Committee, said the deal's reported outlines would amount to little more than "the pre-war status quo" with Iran.

"I think this was a blunder," Van Hollen said on May 25. "When you're digging a hole, you should stop digging, and that sounds like maybe what we're doing finally."

Trump, who has also faced criticism from hawkish conservatives over his willingness to compromise with Iran, pushed back.

"If I make a deal with Iran, it will be a good and proper one ... So don't listen to the losers, who are critical about something they know nothing about," Trump said on May 24.³⁵⁹

Meanwhile, China, on May 25, urged the US and Iran to continue the "momentum of de-escalation". "China's position on the Iranian situation is noticeably clear. This is a conflict that should never have happened, and there is no need for it to continue," a Foreign Ministry spokesperson said. "An earlier solution serves the interests of both the US and Iran, as well as regional countries and the world at large," she added. The spokesperson stressed it was "important to sustain the momentum of de-escalation, stay committed to the direction of political resolution, and seek a solution through dialogue and consultation that accommodates the concerns of all parties."³⁶⁰

Rubio said on May 25 that there might be news "maybe today" in the talks between Iran and the US to end the war. Trump said that an agreement was "largely negotiated" and awaited finalization.³⁶¹

The US and Iran have avoided direct attacks since a temporary ceasefire took effect in April, allowing diplomatic outreach on a broader agreement to continue.³⁶²

As potential signs appeared that the war between the two sides could wind down following recent diplomatic contacts, diplomacy continued.

On May 25, Iran's top negotiator and its foreign minister were in Doha for talks with Qatar's prime minister on a potential deal with the U.S. to end the three-month-old war, an official briefed on the visit said on May 25, after Washington and Tehran played down hopes for an imminent breakthrough.

Even as the talks went ahead, US forces on May 25 conducted strikes in southern Iran against targets including boats trying to lay mines and missile launch sites, in what it described as defensive actions.

Centcom claimed that it continued to "defend US forces "while using restraint during the ongoing ceasefire."³⁶³

The discussions focused primarily on the Strait of Hormuz and Iran's stockpile of highly enriched uranium, while Iran's central bank governor addressed the potential release of frozen Iranian funds as part of a final deal. Iran's foreign ministry spokesperson Baghaei said earlier that nuclear issues would only be negotiated on if the framework accord is agreed first.³⁶⁴

On May 25, Trump said talks with Iran were going "nicely", but warned of fresh attacks if they failed. It "will only be a Great Deal for all, or no Deal at all". Trump said his key aim in the war is to prevent Iran from developing a nuclear weapon with its highly enriched uranium. Tehran has consistently denied it has plans to do that.

The two sides remain at odds on several other issues, such as Israel's war in Lebanon with the Iranian-backed Hezbollah militia and Tehran's demands for the lifting of sanctions and the release of tens of billions of dollars of Iranian oil revenues frozen in foreign banks.

On May 25, Iran said it had downed a "hostile" stealth drone using a new air defense system, Iranian news agencies reported, without saying where it had come from.

"This is a sign from us that no more stealth drones can penetrate the skies of the Persian Gulf," Fars quoted unnamed officials as saying.

Potentially complicating the Lebanon track in later talks, Israeli Prime Minister Benjamin Netanyahu said on May 25 that Israel would intensify strikes against Hezbollah in Lebanon. Israel's military soon thereafter said it was attacking Hezbollah infrastructure in Lebanon's eastern Bekaa Valley and several other areas.

Israel and Lebanon agreed to a ceasefire in mid-April, but Israel has continued airstrikes it says are acts of self-defense against Hezbollah, which was not party to the truce.³⁶⁵

Perplexingly, Trump also called on more Arab and Muslim states to sign up to the Abraham Accords, brokered during his first term in office and aimed at normalizing ties between those states and Israel. He said Saudi Arabia and Qatar should at once sign, and Pakistan, Egypt, Jordan, and Turkey should follow suit, calling his request mandatory. The statement reflected an attempt to use the Iran diplomacy for a wider push around the accords, but the two issues were not interlinked and could not be made so. Others saw the suggestion as aimed at making an Iran deal more palatable to sceptics. Trump was trying to sell an Iran deal as an Abraham Accords project that was good for Israel and good for the region. But that was just a fantasy and was not going to happen.³⁶⁶

Baghaei said the potential Iran deal had no specific details on management of the Strait of Hormuz, through which about a fifth of the world's oil and liquefied gas usually flows.

Iran will not charge tolls for ships to pass through, but there will be a cost for services offered, such as navigation and steps to protect the environment, he said, under a protocol to be agreed with Oman, which lies on the opposite shore of the waterway.³⁶⁷

The US and Iran discussed a plan to open the Strait about 30 days after reaching a deal to end hostilities.

Iran would then clear mines from the strait during a 30-day window, after which ships from all countries could navigate freely and safely. Since the war began, only a few dozen vessels have been passing through the Strait of Hormuz compared with 125 to 140 daily previously. On May 25, only 32 vessels and five oil tankers passed through the strait in the past 24 hours with the authorization of the IRGC.³⁶⁸

The standoff has caused a spike in oil prices and driven up the costs of fuel, fertilizer, and food. On May 25, oil prices fell more than 4% to two-week lows amid optimism that a deal might come soon.³⁶⁹

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Foreign Minister Dar, on May 26, called for restraint and de-escalation in the Middle East, warning the United Nations Security Council (UNSC) that another prolonged conflict would endanger regional peace and further strain the fragile international order.

While referring to the ongoing efforts to achieve a resolution to the conflict between Iran and the United States, "The entire world is watching. We must succeed in the interest of regional and global peace and security."³⁷⁶

Dar said Pakistan had consistently advocated restraint, de-escalation, and diplomacy.

"As a friendly neighbor of Iran and brotherly countries of the Gulf, Pakistan consistently stood for restraint, de-escalation, and a return to diplomacy," he said.

He added that during his recent visit to Beijing, Pakistan and China had announced a five-point initiative for peace and stability in the Gulf and Middle East while warning that another conflict would be a great threat not only for the region but for the entire world.

"Another prolonged conflict would serve no one," Dar warned. "It would endanger regional peace, disrupt global energy flows, deepen humanitarian suffering, and strain an already fragile international order."³⁷⁷

Iran said on May 26 that the United States had violated a ceasefire by striking targets near the contested Strait of Hormuz, potentially complicating efforts to bring the war to a close. Further straining peace efforts, Israel pounded Lebanon with more than 120 air strikes on T May 26 in one of the heaviest days of bombing in weeks, Lebanese security sources said. Iran has sought an end to Israeli attacks in Lebanon as part of any deal.

Iran's foreign ministry said U.S. strikes in Iran's southern Hormozgan province, where Iranian media reported sounds of explosions early on May 26, stood for a "gross violation" of a tenuous ceasefire in place for seven weeks. The U.S. said its attacks were defensive in nature, targeting missile sites and boats trying to lay mines.³⁷⁸

Rubio said it could take "a few days" to negotiate a deal to halt the conflict, after both sides had previously shown progress on a first agreement that would end hostilities and restart shipping through the Strait.³⁷⁹

Following the U.S. strikes, Raisi said that the Strait of Hormuz had to be open "one way or the other."

The war has caused an unprecedented oil supply shock, pushing up the costs of fuel, fertilizer, and food.

Traffic through the Strait of Hormuz has been a fraction of its usual level since the war began. Global benchmark Brent crude futures rose by about 3.5% on May 26 to around \$100 a barrel.³⁸⁰

Meanwhile, Iranian and U.S. officials had shown that recent indirect talks made progress on a memorandum of understanding, or initial deal, which would lead to further negotiations over a final agreement.

Iran's top negotiator, Qalibaf, returned to Iran from Qatar after seeking the release of around \$24 billion of frozen Iranian funds as part of the first agreement. The funds were the last sticking point in the deal. Iran's ISNA news agency said the negotiations in Qatar were "overall positive."

While Iran's core preconditions center on lifting the U.S. naval blockade, nuclear issues, and sovereignty guarantees, Iran also wants a stop to the conflict in Lebanon, where a mid-April ceasefire has failed to halt fighting between Israel and Iran-backed militant group Hezbollah.

Netanyahu said in a statement on May 26 that Israel was "deepening its operations in Lebanon" and running with "large forces in the field."

Israeli strikes had hit across southern and eastern Lebanon on May 26, killing 31 people and wounding 40.³⁸¹

A first deal would end hostilities on all fronts, get traffic moving through the strait over 30 days, and provide some financial relief. More difficult issues, such as Iran's nuclear program, would be negotiated in a second phase.

Iran has been letting some ships through the strait, giving preference to vessels linked to countries with which it has close ties, Reuters has reported.

Trump has said his key aim in the war is to prevent Iran from developing a nuclear weapon with its highly enriched uranium. Tehran denies any such plans.

Trump has also used the crisis to call on more Arab and Muslim states, including Saudi Arabia, to sign up to the Abraham Accords, which aim to normalize ties with Israel.

Saudi Arabia has said it would not sign the accords without a roadmap to Palestinian statehood.

Thousands have been killed in the wider conflict, mostly in Lebanon and Iran.³⁸²

U.S. Secretary of State Marco Rubio said on May 26 that negotiating a deal with Iran could "take a few days," dimming hopes for an imminent end to the conflict after the U.S. conducted what it called defensive strikes in southern Iran. Iran's foreign ministry spokesperson said earlier that conclusions had been reached on many topics discussed in a potential 14-point Memorandum of Understanding (MoU), but this did not mean a deal to end the war would be reached soon. Following a ceasefire in early April, the two sides have remained at odds on difficult issues,

including Iran's nuclear ambitions, Israel's war in Lebanon with the Iranian-backed Hezbollah militia, and Tehran's demands for the lifting of sanctions and the release of frozen assets. After weeks of indirect talks, both sides say they have made progress on an MoU that would halt the war and give negotiators 60 days to reach a final deal.³⁸³

Iranian said a framework deal is only about ending the war on all fronts, setting up a 30-day framework for movement through Hormuz and shipping, and providing some financial relief.

If the first phase of the agreement progressed, the nuclear issue could be reviewed and negotiated during the 60 days. The last deal over the nuclear program - struck in 2015 and torn up by U.S. President Donald Trump in 2018 - took years of negotiations between large teams of technical experts. Tehran sees its control of Hormuz, and Washington views its blockade of Iranian ports as its chief point of leverage.

The United States believes Iran wants to build a nuclear bomb. Iran has always denied this, saying its atomic program is for peaceful purposes only. The focus is on its enrichment of uranium, which generates fuel for nuclear power but can also make material for a warhead. An agreement may eventually be possible, including a lengthy moratorium on enrichment and the export or dilution of the stockpile.

The nuclear question is extremely complicated. Iran might eventually agree to dilute part of its highly enriched uranium in a friendly country into uranium enriched to 5% purity and then have it returned, Iranian sources said.

But many other issues would still need to be addressed: how long the nuclear program would be halted, whether nuclear sites would be dismantled during that period, what happens to stockpiles of uranium enriched to 20% and 5%, and the future of Iran's advanced centrifuges and research and development programs, among others.

A main U.S. demand before the war was that Iran limit the range of its ballistic missiles so that they could not reach Israel. Iran has always refused to discuss its ballistic missiles, saying its right to conventional weapons cannot be on the table and that it still has a large arsenal. Iran's economy has been hurt by sanctions for years, contributing to the nationwide unrest in January. Tehran needs them to be lifted, and tens of billions of dollars of Iranian oil revenues frozen in foreign banks to be released. It also wants reparations for war damage.³⁸⁴

Meanwhile, the United States has sanctioned the Persian Gulf Strait Authority, the body Iran has set up to manage requests for vessels to transit through the Strait of Hormuz. Anyone cooperating with the authority may be providing support to and receiving services from Iran's IRGC and may be sanctioned, the U.S. Treasury said in a statement. The Persian Gulf Strait Authority published a map last week reaffirming Tehran's claims to a wide stretch of water on either side of the choke point. "The Iranian military's latest attempt to extort global maritime trade is proof that Economic Fury has left the regime desperate for cash," U.S. Treasury Secretary Scott Bessent said.³⁸⁵

The latest strikes by the U.S. and Iran in the Gulf dimmed hope of any imminent deal to end the three-month-old war. While a fragile ceasefire announced last month appeared to hold, Trump has dismissed reports by Iranian state TV that a deal to reopen the Strait of Hormuz was close pending talks on other issues.

Here are the main sticking points in the talks.

Tehran sees its control of Hormuz, and Washington views its blockade of Iranian ports as their chief points of leverage. The U.S. believes Iran wants to build a nuclear bomb. Iran has always denied this, saying its atomic program is for peaceful purposes only. The focus is on its enrichment of uranium, which generates fuel for nuclear power but can also make material for a warhead. The nuclear question is extremely complicated. An agreement may eventually be possible, including a lengthy moratorium on enrichment and the export or dilution of the stockpile.³⁸⁶

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The new U.S. strikes targeted an Iranian drone operation that posed a threat to U.S. forces and commercial shipping in the Strait of Hormuz. The military shot down four Iranian attack drones. It also struck a ground control station in Iran's Bandar Abbas that was about to launch a fifth drone. The IRGC had fired toward a U.S. oil tanker that was trying to transit the strait, forcing it to turn back. Iran said that a military official said four vessels had tried to transit the strait early on May 28, only to be turned back by warning shots fired in their direction.

Oil prices jumped more than 3% after Iran's Revolutionary Guards said they targeted a U.S. airbase.³⁸⁸

Brent crude futures rose \$3.51, or 3.72%, to \$97.8 a barrel by 0344 GMT, while the more active August contract LCOc2 gained \$3.35, or 3.63%, to \$95.6. The U.S. West Texas Intermediate futures CLc1 were up \$3.31, or 3.73%, at \$91.99. Both benchmarks slipped more than 5% to touch their lowest in a month in the previous session on the possibility of a U.S.-Iran deal to end their war and reopen the Strait of Hormuz.³⁸⁹

Iran's IRGC said they launched an attack targeting an American air base, which they say was the source of US strikes on Iranian targets on May 28. The IRGC did not specify which air base it targeted. The US has air bases in several nations in the Middle East region. The IRGC said its response was "a serious warning" to the US, saying its "aggression will not go unanswered." Around the same time Iran said the attack was launched, Kuwait's Army reported its air defenses were intercepting "hostile" drones and missiles, though it did not say the origin of the

attacks. On May 28, three explosions were heard to the east of Bandar Abbas, a strategic Iranian port city and naval base near the Strait of Hormuz. A US official confirmed the US military had shot down four Iranian drones and struck an Iranian ground control station in Bandar Abbas that was about to launch a fifth drone.³⁹⁰

The strikes come amid a fragile ceasefire and protracted negotiations to end the war. On May 28, the US military conducted new strikes on Iran, targeting a military site in Bandar Abbas, a strategic port city. Centcom said its forces also shot down four Iranian one-way attack drones "that posed a threat around the Strait of Hormuz." The site in Bandar Abbas was struck as it was about to launch a fifth drone, Centcom said.

Kuwaiti forces then intercepted a ballistic missile fired towards the country, which hosts a large U.S. base.

The IRGC said it had targeted the U.S. base responsible for the Bandar Abbas attack, and that any repeat would lead to a "more decisive response." Kuwait condemned the attack and demanded that Iran at once halt what it called a serious escalation. The incidents, while limited, highlighted the fragility of negotiations to turn the tenuous ceasefire into a lasting agreement to end the three-month-old war, which has killed thousands and upended global energy markets.³⁹¹

The US also imposed sanctions on the "Persian Gulf Strait Authority" – the Iranian body tasked with collecting payments from ships travelling through the Strait of Hormuz. Any ships that pay the authority could also be "exposed to the risk of sanctions", the US Treasury Department said in a statement.

Tehran was collecting fees for "navigational services," and it would continue to manage traffic through the waterway. US Treasury Secretary Scott Bessent described it as the "Iranian military's latest attempt to extort global maritime trade," and "proof" Iran is "desperate for cash".³⁹²

Both sides signaled progress had been made towards a deal late last week, prompting speculation that an announcement would be close. However, Tehran soon cautioned a deal was "not imminent" while Trump said he had instructed his negotiators "not to rush into" one. Earlier, the US president said, "They just want to make a deal - I don't think they have a choice." Trump also said: "Iran is very much intent, they want very much to make a deal.

"So far, they haven't gotten there, and we're not satisfied with it, but we will be. Either that or we'll have to just finish the job."³⁹³

The round of tit-for-tat attacks between Iran and the US was the latest such incident since the ceasefire took effect in early April. Trump has repeatedly said an end to the war is close since mid-March, though the two sides have shown little public movement toward common ground. Iran has called for sanctions to be lifted, foreign assets to be unfrozen, and U.S. forces to be withdrawn from the region. Washington has called for Iran to dismantle its nuclear program, which Tehran says is for peaceful purposes.

On May 28, a tentative agreement was reached in talks between the United States and Iran, though President Donald Trump has not signed off on it, and the situation in the region remained tense.³⁹⁴

Still, the finalization of text between the two nations was a sign that diplomacy was trying, despite active hostilities between the US and Iran. However, Iran said that the text of the agreement "has not yet been finalized or made definitive."³⁹⁵

The MoU would include language lifting constraints on the Strait of Hormuz, allowing unrestricted navigation by vessels and lifting a US blockade. It would start a 60-day negotiation period to address Iran's nuclear program, including the fate of its stockpile of highly enriched uranium. The most difficult issues related to Iran's nuclear program still must be worked out as part of those talks.³⁹⁶

The average number of daily crossings has dropped by 88% since the first US-Israeli strikes on Iran on Feb 28. The deal would specify unrestricted shipping through the Strait and would require the U.S. to lift its blockade of Iranian ports. The U.S. would also lift some sanctions on Iranian oil sales. Iran says any peace deal must also end U.S. ally Israel's attacks in Lebanon. "We're not there yet, but we're very close, and we're going to keep on working at it," Vance said.

"Can't guarantee that we're going to get there, but right now I feel pretty good about it," he said.

The Trump administration has several times said a deal to end the fighting was close, only to have Iran dispute or downplay the claims.³⁹⁷

If approved by leadership in Washington and Tehran, it would amount to the biggest step towards peace since the conflict began on February 28.

The Lebanese conflict shows no signs of flagging. Israel said it had targeted the infrastructure of Iran-backed Hezbollah militants in the southern city of Tyre and had conducted a strike in the

capital, Beirut. Israel has displaced hundreds of thousands of people with a push deep into Lebanon in pursuit of Hezbollah. The Lebanese army said a strike had killed one of its soldiers.³⁹⁸

Earlier, the U.S. warned Oman not to get involved in any effort with Iran to impose a toll in the Strait of Hormuz, and Trump on May 27 threatened to bomb the country, despite a history of economic and military ties between the two countries. Treasury Secretary Scott Bessent said Oman's ambassador had told him there were no plans to impose such tolls. Oman has not mentioned the idea of joint control of the strait with Iran, with which it says it has discussed freedom of navigation. Tehran expressed solidarity with Oman after what it called "U.S. officials' threats".

The reports prompted oil prices to fall in hopes of a potential reopening of the Strait of Hormuz. Mediator Pakistan said its foreign minister, Ishaq Dar, would meet U.S. Secretary of State Marco Rubio in Washington on May 29, although the significance of his visit was unclear.³⁹⁹

Matt Spetalnick, in his article "Trump's room to maneuver narrows as US, Iran close in on framework deal," published in Reuters, May 29, 2026, explains it well:

Trump finds himself in a bind as he seeks to end the war against Iran: he is under pressure to reopen the Strait of Hormuz and get U.S. gasoline prices down, but at the same time faces a potential backlash from Iran hawks in his own party over any concessions to Tehran. Trump's dilemma became clear during a week of hectic diplomacy marked by word of an emerging framework deal that, according to sources familiar with the matter, would extend a current ceasefire and release Iran's stranglehold on the vital oil-shipping route while deferring discussions of its nuclear program. Such an interim agreement, if approved by Trump and Iran's rulers, would amount to the most significant step toward peace since he joined with Israel in attacking the Islamic Republic on February 28, and could ease the soaring energy prices the conflict has triggered. But it could also draw the disapproval of a key segment of Trump's base - influential Republicans clamoring for him to "finish the job" by resuming strikes to close Tehran's path to a nuclear weapon, his main stated reason for going to war. Earlier this week, some of Trump's hardline anti-Iran allies responded to reports of a possible deal with criticism, even arguing that he might gain little beyond the 2015 Iran nuclear deal negotiated by former Senior Republicans rarely at odds with Trump, including Senators Lindsey Graham, Roger Wicker, and Ted Cruz, urged the president not to compromise. Trump pushed back, insisting he was in "no rush" and would only accept a "great" agreement. Caught between the competing demands - a quick solution to high gas prices and an end to Iran's nuclear ambitions - the president has little room to maneuver. "Trump's rhetorical swings and abrupt reversals of the past week suggest a president trying to park a wide war in a tight spot," said Laura Blumenfeld,

a Middle East expert at Johns Hopkins University. A White House official said, "Negotiations are proceeding nicely, and he has made his red lines clear." "President Trump will only make a good deal for the American people, which must ensure that Iran can never have a nuclear weapon".

Alan Fisher, US-Iran skirmishes not enough to derail deal that could be 'inching closer,' Al Jazeera, May 29, 2016, explains it well. He said that: "Trump has made it clear there will be no nuclear weapon, not now, not ever – and what they do with the enriched uranium. And, of course, the idea of whether Iran will be allowed to access its assets, which have been frozen here in the United States. There is still a lot of talking to go on, and, of course, any final deal will be... up to Donald Trump."⁴⁰⁰ There have been a few skirmishes between the US and Iran over the past 72 hours. They are not bad enough to cancel the talks. A deal "could be inching closer."⁴⁰¹

Earlier, Trump had said on May 27 that he was not satisfied with the current state of talks. It was also unclear whether Iran's supreme leader had given his sign-off, believed to be another necessary step toward ending the conflict. Trump has appeared optimistic previously about an agreement with Iran, only to later change course. US sources all cautioned that any advancements in the talks could be upended quickly if Trump decides to withhold his approval. Trump has been seeking advice to ensure the deal is strong enough, one person familiar with the matter said. He has been fixated on ensuring the deal can be marketed as stronger than the 2015 Obama-era nuclear deal from which he withdrew during his first term.⁴⁰²

On May 29, Trump said he would soon decide on a proposed deal to extend the ceasefire with Iran, though the two countries still appeared to differ on significant issues that have been central to the conflict.

Trump also said Iran would have to end its chokehold on the Strait of Hormuz and dismantle its capacity to make a nuclear weapon. "Iran must agree that it will never have a Nuclear Weapon or Bomb. The Hormuz Strait must be at once open, no tolls, for unrestricted shipping traffic, in both directions," Trump said. He also said mines would be removed from the strait, and ships trapped there may start to go home. American Treasury Secretary Bessent added that the US blockade would be lifted gradually if it were to happen. Trump also said mines would be removed from the strait, and ships trapped there may start to go home. He also said that nuclear material would be "unearthed" by the US. Tehran has not agreed to these two conditions. Trump said no money would be exchanged "until further notice" - a reference to Iran's demands for toll payments in the strait, war damage reparations, or a release of frozen Iranian assets.⁴⁰³

Iran said an agreement was close but had not yet been approved, and Trump's comments were an "attempt to portray a fabricated victory." Iran also said the potential deal does not include any nuclear-related issues, while Iran's Foreign Ministry spokesperson Baghaei said that Iran and Oman must decide the management of the strait. The strait would be reopened on Tehran's terms after the US lifts its blockade on Iranian ships. Iran added that there was an agreement to release \$12 billion of Iran's frozen assets.⁴⁰⁴

Oil prices fell LCOc1, and stocks rose on May 29 on news of the potential deal. Meanwhile, Trump is under pressure to reopen the Strait of Hormuz and get US gasoline prices down ahead of the November congressional elections, as voters show increasing frustration over rising prices. At the same time, he faces a potential backlash from Iran hawks in his own party over any concessions to Tehran. The war launched by the U.S. and Israel on February 28 has killed thousands of people in Iran and Lebanon, and caused global economic pain by pushing up energy prices due to Iran's effective closure of the Strait of Hormuz.⁴⁰⁵

Meanwhile, the conflict was now proving to be a catastrophe for the region. The global public opinion demands that the US end the war despite the aims of its partner, Israel. The Trump administration should now grasp the opportunity and make peace with Iran. There is no doubt that the Iranian regime is extremely repressive, cruel, and corrupt, but that does not mean that the US should replace it. Anyways, a replacement of the Iranian regime would require a massive ground invasion, which is going to prove a strategic mistake leading to unintended and severe consequences for the US and the region. The US can make peace with Iran e. After all, the US does business with other even more repressive regimes like India, Egypt, North Korea, China, and even Israel itself. It is not the responsibility of the US to intervene in other nations' internal affairs and set things right, as it sees it. This would be a violation of international law and the UN charter, also. It is time for the US to make peace with Iran by recognizing the Islamic regime, no matter how much it is disliked by the American establishment. The American people overwhelmingly want peace, not war with Iran. Therefore, the Trump administration should have taken the difficult path of diplomacy with Iran to resolve the outstanding nuclear issue. Unfortunately, that did not happen as both the US and Israel had decided otherwise. Many American leaders could not come to understand the true nature of the political situation and the political compulsions of the Iranian nation. The Trump administration faced a choice, and it erred because it listened to only favored viewpoints. In hindsight, Trump should have ignored such hawkish views. But they were not, and that was the problem with the current Trump

administration. Too many extremist views got accepted in their top decision-making circles. Obviously, that made for bad policy decisions like the mess in the war in Iran.

Iran has responded to the US-Israeli strikes with waves of drone and missile attacks not only toward Israel but also against Gulf states hosting US military installations, including Saudi Arabia, widening the conflict's regional impact. The escalation has struck key infrastructure across Gulf countries, including airports, ports, hotels, and oil and military facilities. The GCC has been struck badly and is now vociferously condemning Iran. But these vehement comments can be ignored as the Gulf Arabs are not about to enter the war. Given their own weaknesses, these countries are incapable of taking on the Iranians at all. Therefore, all they can do is outright condemnations of Iran and, like the UAE, join the US international force to open the strait. However, military action to do just that is not possible. Iran has the advantage of its strategic location, being north of the Strait of Hormuz. Thus, geography is to its advantage, and the Iranians will exploit it to the best of their ability.

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Meanwhile, the war in Lebanon has been taking place alongside a confrontation on a separate front between Israel and Lebanon's Hezbollah, backed by Iran, with Israel saying on Sunday its troops had raided a number of the armed group's sites in southern Lebanon.

Israeli military spokesperson Brigadier General Effie Defrin told reporters Israel continues to hit Iran nonstop and expects "weeks more of fighting against Iran and Hezbollah."

Hezbollah said it had attacked several border areas in northern Israel. Israeli emergency services said one person was killed in a kibbutz near the border. Israel later said it was checking whether the death was caused by Israeli fire.

Hezbollah has fired hundreds of rockets at Israel since it entered the regional war on March 2, prompting an Israeli offensive that has killed more than 1,000 people in Lebanon.

Israel said it had instructed the military to accelerate the demolition of Lebanese homes in "frontline villages" to end threats to Israelis, and to destroy all bridges over Lebanon's Litani River, which it said were used for "terrorist activity".⁴⁰⁶

While Israeli attacks in Gaza declined in the days after the U.S. and Israel launched attacks on Iran on February 28, according to residents, medics, and analysts, they have since begun to rise again. Israeli fire has killed dozens of Palestinians since the outbreak of the Iran war, Gaza health officials say.

In Gaza, there have been regular outbreaks of violence since a ceasefire went into effect in October following two years of devastating war triggered by Hamas-led attacks in Israel in October 2023. Gaza's health ministry says that at least 680 people have been killed by Israeli fire since the October ceasefire. Israel said four soldiers were killed by militants in Gaza in the same period.⁴⁰⁷

Meanwhile, Trump listed his aims for the war in the Middle East in a post on his social media site Truth Social on March 20, as he said the US was considering "winding down" its military efforts.

He said the US was getting close to "completely degrading" Iran's missile capability and destroying its defense industrial base.

He adds that the US wants to end Iran's navy and air force as well as its anti-aircraft weaponry.

Trump also said Iran should never be allowed to get close to nuclear capability and that the US would protect its Middle East allies "at the highest level".

Meanwhile, US Defense Secretary Hegseth said the US goals had not changed since it first launched strikes on Iran on February 28. He told reporters the goals were to destroy Iran's missile launchers, its defense industrial base, and its navy, and to never allow Iran to get a nuclear weapon.⁴⁰⁸

Meanwhile, major Asian stock markets fell sharply after the US and Iran threatened to intensify hostilities as the war entered its fourth week. Japan's Nikkei 225 was down by 4.8% in early trading, while the Kospi in South Korea was more than 5.5% lower. Oil prices fluctuated, with Brent crude about 0.8% lower at \$111.25 (£83.48) a barrel, and US-traded oil was broadly flat at \$98.18.⁴⁰⁹

Meanwhile, the US is expected to send thousands of soldiers from the U.S. Army's elite 82nd Airborne Division to the Middle East, two people familiar with the matter told Reuters on Tuesday, adding to a massive U.S. military buildup even as President Trump talks about a possible deal with Tehran to end the war. Before the added forces were sent to the region, there were 50,000 U.S. troops there. News of reinforcements comes just a day after Trump postponed threats to bomb Iranian power plants, saying there had been "productive" talks with Iran.

But after Trump's Truth Social comment, Iran denied that any talks had been held. The US has conducted strikes against 9,000 targets inside Iran since U.S. and Israeli military operations against Iran started on February 28. Thirteen U.S. troops have been killed so far in the war, and 290 have been wounded, a U.S. official said. While ten stay seriously wounded, 255 troops returned to duty.⁴¹⁰

The Trump administration has also discussed options to send ground forces to Iran's Kharg Island, the hub for 90% of Iran's oil exports, Reuters has reported.

Any use of U.S. ground troops - even for a limited mission - could pose significant political risks for Trump, given low American public support for the Iran campaign and Trump's own pre-election promises to avoid entangling the U.S. in new Middle East conflicts.

Meanwhile, a Reuters/Ipsos poll published on Tuesday found that 35% of Americans approve of the U.S. strikes on Iran, down from 37% in a survey conducted last week. Some 61% disapproved of the strikes, compared to 59% last week.⁴¹¹

On March 24, Trump sought a month-long ceasefire to discuss the 15-point plan. Trump said on March 25 the U.S. was in "negotiations" to end the war, which has already killed thousands and created the worst energy shock in history, leading to global fuel shortages and roiling markets.⁴¹²

Stocks rose, and oil prices fell on March 25 on reports that the U.S. is seeking a month-long ceasefire and had sent a 15-point plan to Iran for discussion, raising hopes for a resumption of oil exports out of the Persian Gulf.

Trump said the US was talking to "the right people" in Iran to end hostilities, adding the Iranians wanted to reach a deal very badly.

Iran's powerful parliament speaker, Mohammad Baqer Qalibaf, had dismissed such reports as "fake news."⁴¹³

On March 26, Pakistan said Iran was considering the U.S.'s proposals in indirect talks, while President Trump said Tehran 'better get serious soon.'

Israel said it killed the commander of Iran's Revolutionary Guard navy, who was "directly responsible" for mining and blocking the Strait of Hormuz, in overnight strikes.

Meanwhile, Pakistan said the U.S. and Iran were engaged in indirect talks through messages it was relaying, and that Tehran was considering Washington's proposals to end the conflict.⁴¹⁴

In a post on social media, President Trump said Iran's leadership "better get serious soon" about talks. Trump, who has told associates that he wants the war ended in the coming weeks, also said public statements from Iran's leaders were different from their private comments.

Iran said it had launched missiles and drones at dawn in an attack on Israel as fighting continued in the region.⁴¹⁵

Two people were killed in the United Arab Emirates by debris from a missile, while Kuwait and Saudi Arabia intercepted missile and drone attacks.

The U.S. and Israel temporarily removed two senior Iranian officials from their list of officials to eliminate, U.S. officials said.

Iran signaled it could move to close or control a second key waterway, the Bab al-Mandeb Strait, with the help of Yemen's Houthi rebels.

The U.S. has begun to mass ground troops near Iran. Here is what we know about the deployments.⁴¹⁶

Pakistan's foreign minister has confirmed that the country handed a 15-point peace plan to Iran as it acts as an intermediary between Tehran and the US.

"US-Iran indirect talks are taking place through messages being relayed by Pakistan," Foreign Minister Ishaq Dar wrote on X.

"In this context, the United States has shared 15 points, being deliberated upon by Iran."

He claimed that Turkey and Egypt, among other countries, are also "extending their support to this initiative."

Pakistan has functioned as a key intermediary in the current bout of diplomacy between the US and Iran, delivering a 15-point plan proposed by Washington that addresses issues like Tehran's nuclear ambitions and its ballistic missile program.

Trump administration officials are working to arrange a meeting in Pakistan this weekend to discuss an off-ramp to the war in Iran, two senior administration officials told CNN.⁴¹⁷

Meanwhile, US President Donald Trump said Iran was eager to reach an agreement to end four weeks of fighting, a claim that contradicted Tehran's position. Iranian officials have said they are reviewing a US proposal but have no intention of entering formal talks to wind down the conflict.

On the other hand, Iran had targeted US bases using missiles and drones.⁴¹⁸

In Pakistan, officials said Islamabad had conveyed to Tehran a 15-point American plan to stop the fighting. Israel was skeptical Iran would agree to the terms, and that Israel was concerned US negotiators might make concessions. Israel also wanted any agreement to preserve its choice to conduct pre-emptive strikes. Iran had told intermediaries that Lebanon must be included in any ceasefire agreement with the US. and Israel, six regional sources familiar with Iran's position said.

The Israelis completed a wide-scale wave of strikes targeting infrastructure in several areas across Iran. Admiral Cooper, head of US Central Command (Centcom), claimed that the US had hit two-thirds of Iran's production facilities for missiles and drones, and drone and missile launch rates were down by 90 percent. Iran retaliated with missiles and drone strikes across the Gulf.

Meanwhile, President Trump railed against Nato allies for doing "absolutely nothing" to help the US in its military campaign against Iran. He wrote (in all caps for emphasis): "NATO NATIONS HAVE DONE ABSOLUTELY NOTHING TO HELP WITH THE LUNATIC NATION, NOW MILITARILY DECIMATED, OF IRAN. THE U.S.A. NEEDS NOTHING FROM NATO, BUT "NEVER FORGET" THIS VERY IMPORTANT POINT IN TIME!⁴¹⁹

On March 25, China's top diplomat said that a "glimmer of hope" for peace has appeared due to moves to stop the war in the Middle East, despite Tehran vowing to keep fighting. The White

House warned that Trump was ready to "unleash hell" if Iran did not accept a peace plan to end the war. But Tehran insisted it will not negotiate. The ramped-up messages dashed hopes of any imminent de-escalation, with violence on the ground showing no sign of abating after almost four weeks.

Trump insisted on March 25 that Iran was taking part in peace talks, suggesting Tehran's denials were because Iranian negotiators fear being killed by their own side.

"They are negotiating, by the way, and they want to make a deal so badly. But they're afraid to say it, because they figure they'll be killed by their own people," Trump told a dinner for Republican members of Congress.

China's foreign minister Wang Yi urged dialogue in separate calls with his Turkish and Egyptian counterparts, suggesting that both Tehran and Washington had shown signals they were willing to return to the negotiating table. "With both the United States and Iran signaling a willingness to negotiate, a glimmer of hope for peace has emerged," Wang told Egyptian Foreign Minister Abdelatty. On March 25, Iran's Foreign Minister Araghchi said that "so far, no negotiations have taken place, and I believe our position is completely principled".⁴²⁰

Wang told Turkish Foreign Minister Fidan during the call that the rights and wrongs of the conflict in the Middle East are "crystal clear", offering support to the country in helping to ease the resumption of negotiations. Turkey has engaged in "intense" diplomatic efforts to end the war by talking to both Washington and Tehran, Fidan said. "Prolonging this war would only result in further casualties and needless losses, leading to a further spillover of the conflict," Wang said.⁴²¹

On March 25, President Trump said that he wants to avoid a protracted war in Iran and that he hopes to bring the conflict to an end in the coming weeks.

Nearly one month into the war, Trump thought the conflict was in its final stages. He had planned a mid-May summit with Chinese leader Xi Jinping in Beijing with the expectation that the war would be concluded before the meeting began.⁴²²

Meanwhile, mediators from Turkey, Egypt, and Pakistan are pushing for a meeting between U.S. and Iranian officials as soon as this week. President Trump and his political allies have expressed enthusiasm for talks.

Earlier, on March 24, the US had sent Iran a 15-point plan to end the war, officials said, which centers around earlier Trump administration demands of Tehran. The document, sent through intermediaries, called on Iran to dismantle its three main nuclear sites and end any enrichment on Iranian soil, suspend its ballistic-missile work, curb support for proxies, and fully reopen the Strait of Hormuz. In return, Iran would have nuclear-related sanctions lifted, and the US would aid, while monitoring, the country's civilian nuclear program. The plan broadly reflected the US proposal discussed with Iran before the war started Feb. 28, when President Trump accused Tehran of not negotiating in good faith. In hindsight, it was a grave mistake on the part of the

Trump administration. Later, Iran's new, harder-line leadership said that it now had higher demands of Washington, such as seeking reparations for the weeks of attacks.⁴²³

On March 26, Israel removed Iranian Foreign Minister Araqchi and Parliamentary Speaker Qalibaf from its hit list after Pakistan urged Washington to press Israel not to target them.⁴²⁴

By now, Pakistan, Egypt, and Turkey are playing the role of mediators between Tehran and Washington to end the Iran war. Islamabad had kept direct contact with both Washington and Tehran at a time when such channels were frozen for most other countries. Islamabad has also been seen as a venue for peace talks. Iran was reviewing a 15-point proposal from U.S. President Trump, sent through Pakistan, to end the war. The proposal called for removing Iran's stocks of highly enriched uranium, halting enrichment, curbing its ballistic missile program, and cutting off funding for regional allies. Meanwhile, Trump claimed that Iran was desperate to make a deal, while Araqchi said Tehran was reviewing the US proposal but had no intention of holding talks to wind down the conflict.⁴²⁵

Laurence Norman, *The Narrow Path to a U.S.-Iran Deal*, published in the Wall Street Journal on March 26, said that:⁴²⁶

Both sides will have to scale back demands, but their history points to a way to get it done. The prospects of a diplomatic deal ending the war between the U.S. and Iran look dim right now. But Middle East veterans say there is a pathway for an agreement if the two sides want to engage.

By now, the impact of the war had become severe. It caused the worst energy shock in history and has spread far beyond the region. With the Strait of Hormuz, a conduit for a fifth of the world's oil and liquefied natural gas, effectively closed, businesses from airlines to supermarkets and used-car dealers are grappling with challenges including rising costs, weakening demand, and disrupted supply chains.

Some governments were weighing support measures last used during the COVID pandemic. Farmers were struggling to source diesel for their tractors, and tens of millions more people would face acute hunger if the war continued into June, the World Food Program estimated. Sultan Al Jaber, the CEO of Abu Dhabi state oil company ADNOC, described Iran's restriction of passage through the Strait of Hormuz as "economic terrorism. "When Iran holds Hormuz hostage, every nation pays the ransom, at the gas pump, at the grocery store, at the pharmacy," he added, "No country can be allowed to destabilize the global economy in this way. Not now. Not ever."⁴²⁷

With stock markets weak, gas prices high, and his approval ratings at an all-time low, Trump had strong incentives to find a solution before the conflict escalates further beyond his control, and ahead of the November mid-term elections for Congress.

Meanwhile, a Reuters/Ipsos poll conducted March 20-23 found 61% of Americans disapproved of Trump.⁴²⁸

On March 26, US-Israeli strikes on Iran continued as Iranian missiles targeted central and northern Israel. The GCC Secretary-General al-Budaiwi said that Iran's actions, including the attacks and closing the Strait of Hormuz, had "overcome all red lines."

The US threatened Iran to accept defeat or be "hit harder" than ever before, as Tehran rejected talks and pledged to continue retaliating.

On March 26, President Trump issued a warning to Tehran on social media to "get serious soon" on negotiating a deal to end the war. The post comes a day after Trump said a deal to end the war is near, despite Tehran's dismissal of his 15-point ceasefire plan.⁴²⁹

Israel said on March 26 that it killed Commodore Tangsiri, the head of the Iranian Revolutionary Guard's navy. Israel's Defense Minister, Katz, said Tangsiri had been killed along with other senior naval commanders in a strike overnight.

Meanwhile, in a surprising development, the secretary-general of a bloc of Gulf Arab countries said that Iran is charging fees for ships to safely transit the Strait of Hormuz. Industry experts say some ships are paying in Chinese yuan to pass through the Strait of Hormuz, where 20% of all traded oil and natural gas is transported in peacetime.⁴³⁰

Israeli forces pound Lebanon as Prime Minister Netanyahu said that Israel was expanding what he calls a "buffer zone" in southern Lebanon.⁴³¹

As of March 26, the death toll from the war has risen to more than 1,500 people in Iran, 1,100 people in Lebanon, 20 in Israel, and 13 U.S. military members, as well as several others. Millions of people in Lebanon and Iran had been displaced.⁴³²

Trump kept on making outlandish statements.

On March 27, Trump said he would extend the deadline to April 6 for Iran to make a deal to end the war or face the destruction of its energy plants, saying talks were going "very well", but Tehran dismissed the US proposal as unfair.

Despite Trump's upbeat assessment, Iran continued to retaliate against U.S. and Israeli strikes by hitting Israel and U.S. bases. It also struck Gulf states and effectively blocked the Strait of Hormuz.

Trump said the U.S. would become Iran's "worst nightmare" if it did not follow U.S. demands, which include opening the Strait of Hormuz and ending its nuclear program. He said taking control of Iran's oil was a possibility, but gave no details. Meanwhile, Iran had hardened its stance since the war began, demanding guarantees against future military action, compensation for losses, and formal control of the strait, and that Lebanon must be included in any ceasefire deal.

Meanwhile, Iran launched multiple waves of missiles at Israel, striking Tel Aviv, Haifa, and other areas, including a Palestinian town in central Israel. At least one ballistic missile hit Tel Aviv, while others carried cluster missiles that dispersed smaller explosives, damaging homes, and cars. One man was killed in Nahariya after Hezbollah fired a rocket barrage at the northern city. In Iran, strikes hit the southern city of Bandar Abbas and a village on the outskirts of the

southern city of Shiraz. A university building in Isfahan was reported to have been hit. At least six people were killed after a strike damaged three residential buildings in central Iran's Qom, the semi-official Fars news agency said, citing a provincial official.⁴³³

By now, war had spread across the Middle East, killing thousands of people and hitting the global economy with soaring energy prices, fueling global inflation fears.⁴³⁴ The war had massively disrupted shipping, sending crude oil prices up around 40%, causing liquefied natural gas prices to spike, and prices for nitrogen-based fertilizers, critical to food production, to rise around 50%. Stock indexes fell sharply, with Nasdaq dropping more than 2% to confirm a correction, and Brent oil jumped to more than \$105 a barrel as hopes diminished for a quick resolution to the war.

Meanwhile, Pakistan had appeared as a key intermediary between Iran and the United States to try to secure talks to end their war in the Gulf. On March 26, Foreign Minister Dar confirmed Islamabad was involved, showing that US-Iran indirect talks were taking place through messages being relayed by the country. Pakistan has strong credentials as the only country in the region enjoying good relations with the US and Iran. Concurrently, it enjoys strategic relations with Saudi Arabia, the Gulf states, and Türkiye.⁴³⁵

Pakistan had avoided taking sides and tried instead to keep stable relations with all parties. Prime Minister Sharif condemned both the US-Israeli strikes that killed Iran's supreme leader, Ayatollah Ali Khamenei, and Tehran's retaliation against its neighbors.

Pakistan shares a 900-kilometre border in its southwest with Iran, and deep historical, cultural, and religious links. Iran was the first country to recognize Pakistan after its independence in 1947. Pakistan returned the favor for the Islamic Republic after the 1979 revolution. They cooperated against Moscow during the Soviet occupation of Afghanistan. Pakistan also has some Iranian diplomatic interests in Washington, where Tehran has no embassy. And it is home to the world's second-biggest Shia Muslim population after Iran.

Pakistan had good relations with the US, too. Earlier, during the post-9/11 "war on terror", Pakistan had faced US allegations that it was harboring militants responsible for attacking coalition troops across the border in Afghanistan. Relations were further strained when US troops killed al-Qaeda chief Osama bin Laden in Abbottabad in 2011 without telling Islamabad, and Pakistan faced accusations of complicity in harboring the fugitive. Later, relations between the US and Pakistan had improved considerably.

Pakistan and Saudi Arabia had historic cordial relations, and both had earlier signed a strategic mutual defense agreement in 2025. Pakistan had been quick to keep Riyadh on side, and Sharif had visited for talks with Crown Prince Mohammed bin Salman.

Pakistan was now facing an existential crisis because of the war. Therefore, neutrality made economic sense for Pakistan, as it relies on oil and gas imports through the Strait of Hormuz. Continued disruption could worsen fuel supplies, drive up prices, and force further austerity measures. Obviously, Pakistan preferred to take steps meant to help end the war and did not

wish to get dragged into it. An end to the conflict would not only boost regional stability and security but also Pakistan's international standing.⁴³⁶

Meanwhile, Trump continued to threaten Iran. "They now have the chance, that is, to permanently abandon their nuclear ambitions and to join a new path forward," Trump said. "We'll see if they want to do it. If they don't, we're their worst nightmare." He claimed Tehran had let 10 oil tankers sail through the Strait of Hormuz as a goodwill gesture in negotiations, including some Pakistan-flagged vessels.⁴³⁷

Since the war began with an Israeli airstrike that killed Ayatollah Ali Khamenei, dozens of senior Iranian security and military officials have been killed by the US and Israel, as well as political leaders such as Larijani, the veteran head of the national security council. The new supreme leader, Mojtaba Khamenei, was thought to have been severely injured in the attack that killed his father.

Though the US claims to have destroyed most of Iran's naval capabilities, Tehran has smaller boats capable of laying mines and anti-ship cruise missiles that can be launched from ashore. Either weapon could make the strait impassable for shipping.

Meanwhile, Trump threatened Iran again with a massive escalation of the US-Israeli offensive if it did not reopen the strait within 48 hours. Iran retaliated with a threat to launch broad attacks on energy infrastructure in the Gulf and Israel. Trump then extended his ultimatum. Iran's foreign minister, Araghchi, accused the US of "double standards" and said international law was "not a tool of convenience."

He wrote on X: "The US backed Israel's Gaza blockade ... yet condemns Iran for defending itself in the Strait of Hormuz. Double standard: Israel's crimes are OK while Iran's defense against aggressors is condemned."

Analysts said it was exceedingly difficult to see any immediate pathway to an agreement given the gap between the two sides and the continuing widening of the conflict, which had directly involved more than a dozen countries in the region.

Thousands of US Marines and airborne troops have been sent to the region and could be used to seize Kharg Island, Iran's principal hub for oil exports, or other strategic points in the Gulf. Such a move would mark a significant escalation in the conflict.

There was talk of a ground invasion by the US military. Bahreini, Iran's top envoy to UN institutions in Geneva, warned that any US and Israeli attempt to mount a ground invasion of Iran would be a "big" mistake.

Meanwhile, Israel said its invasion of southern Lebanon is aimed at protecting its northern border towns from attacks by Hezbollah, the Iran-backed militant Islamist movement, and setting up a defensive buffer zone. Eighteen people have been killed in Israel in the new conflict.⁴³⁸

On March 27, Trump said he would delay a threatened strike on Iran's energy infrastructure and extend his deadline for Tehran to reopen the Strait of Hormuz until April 6, saying talks to end the war are "going very well." The move marks a pullback from Trump's earlier warning that the U.S. would target Iran's energy plants if the crucial shipping lane remained closed. Trump's announcement on social media came after U.S. stocks fell sharply and oil prices rose, as doubt took over again on Wall Street about an end to the war. The S&P 500 slumped 1.7% for its worst day since January and is back on track for a fifth straight losing week. That stretches back to before the Iran war began, and it would be the longest such losing streak in four years. Iran has been blocking ships it sees as tied to the U.S. and Israel from the strait while allowing limited traffic, and Tehran appears to be charging fees for safe passage.⁴³⁹

Meanwhile, Israel has moved thousands of troops across the border into Lebanon, and Israeli forces and Iran-backed Hezbollah militants have been fighting on the ground for at least three weeks. As of March 27, the war has killed more than 1,900 people in Iran, 1,100 in Lebanon, and 13 U.S. military members, as well as several civilians on land and sea in the Gulf region. Eighteen people have died in Israel, while three Israeli soldiers have also been killed in Lebanon. Millions of people in Lebanon and Iran have been displaced.⁴⁴⁰

Meanwhile, the conflict continued. The Iranian strategy of closing the Strait of Hormuz is working only because of its great significance. Al-Hashemi, in his excellent article *The Strait of Hormuz is not just an oil chokepoint*, published in *Al Jazeera* on March 27, 2026, explained that:⁴⁴¹

The Strait of Hormuz is the only major commercial artery on earth named after a god. The name derives from Hormoz, the Middle Persian rendering of Ahura Mazda – the Zoroastrian deity of wisdom, light, and cosmic order. This is not poetic license; it is an etymological fact. The ancient Persians did not simply build a trade route here. They consecrated it. A place named after the god of order has become the single point where global order faces its greatest vulnerability. Through these waters – 167km (104 miles) long, 39km (24 miles) wide at their narrowest point – pass an estimated 30,000 vessels per year. They carry not only a fifth of the world's seaborne oil and liquified natural gas but also the urea needed for the fertilizers that grow its food, the aluminum that constructs its infrastructure, the helium that cools its semiconductors, and the petrochemicals that sustain its pharmaceutical and manufacturing base. The Strait of Hormuz is not an oil chokepoint. It is the aortic valve of globalized production – and like any valve, when it fails, the entire circulatory system collapses....The standard characterization of the Strait of Hormuz as an energy corridor is flawed. The transportation of oil and liquefied natural gas accounts for about 60 percent of its regular traffic. Closure inevitably triggers cascading failures across several industries, including agriculture, manufacturing, construction, and semiconductor production. More than 30 percent of the world's trade in ammonia, 50 percent of urea, and 20 percent of diammonium phosphate – all key for the fertilizer and agriculture sectors – are transported through the strait. Some 50 percent of global Sulphur, a key part of metal processing, is also exported through this narrow passage. Vessels carrying a third of the world's helium, used in various technologies from semiconductors to MRIs, go through the strait as well. 10 percent of global aluminum and a significant chunk of plastic produced in the Gulf also pass through. The Strait of Hormuz is also a

major thoroughfare for food supplies for Gulf countries, which are highly dependent on food imports. All this data reveals systemic fragility not just in the region, but in the world. Unlike oil, fertilizer cannot be rerouted; there are no pipelines for ammonia or urea. When the strait closes, the nitrogen supply chain simply stops. Synthetic nitrogen fertilizers feed 48 percent of the global population. The mid-April deadline for Northern Hemisphere nitrogen application means disruptions in March translate directly into lower yields in September. Aluminum potlines, once shut down, do not restart quickly – the metal solidifies in the cells, requiring weeks of controlled procedures and incurring substantial added cost. For the more than 100 million people in and around the Gulf, money cannot buy food security when the physical route is closed. Saudi Arabia imports more than 80 percent of its food. Qatar imports 85 percent. The Gulf is wealthy, but it is structurally dependent on a single 39km passage for survival. The crisis that began on February 28 is structurally unique. It is the first time the Strait of Hormuz has been closed, and there is a real risk of Bab al-Mandeb (“the Gate of Tears”), a narrow passage on the Red Sea, following suit, if the Houthis choose to add pressure on the global economy in support of their Iranian allies. If that happens, it would mean that two of the world’s three critical maritime chokepoints would be shut down at the same time. The Suez Canal blockage of 2021 was a single-point, six-day disruption. The COVID-19 pandemic was a demand shock. The Ukraine war disrupted specific commodities through specific corridors. The current conflict has shut down the arterial system itself. The problem is not just the physical disruption and the attacks on vessels. It is also the reaction of the financial system. Within 48 hours of the start of the war, the world’s largest marine insurance mutuals issued cancellation notices for war risk extensions covering the Gulf. By March 5, commercial protection and indemnity cover was non-existent. The result was a phantom blockade, a condition in which legal and financial barriers prevent vessel movement even in the absence of physical obstacles. Even if the strait had been physically clear, no commercial vessel could afford to sail through it. Commodity traders lined up \$7bn in emergency credit to avoid forced liquidation. Letters of credit for Hormuz-dependent cargoes were refused by European banks. This was not a supply disruption. It was a cardiac arrest of commerce. Ports outside the chokepoint became the sole practical alternative. But even the bypass was under fire: Iranian drones struck Oman’s Salalah and Duqm, forcing them to suspend operations. The alternative is being attacked while it is being built. A month into this war, the assumption that the flows of strategic goods through the Strait of Hormuz could be taken for granted – that geographical concentration was a cost optimization rather than a systemic risk – has been exposed as collective strategic myopia. The international community must recognize Hormuz as global critical infrastructure, requiring multilateral security guarantees extending beyond energy, strategic reserves covering fertilizers and metals alongside petroleum, and infrastructure dispersal to reduce the concentration of critical flows in a single 39km passage. The world has now seen what happens when Hormuz fails. The next closure will not be a surprise; it will be a test of whether the system has adapted. A single geographic point, named for a god of order, still holds the power to disrupt it.

Meanwhile, the regional situation had changed remarkably as Iran has gained tremendous leverage by closing the Strait of Hormuz, and the US is trying its best to open it. Trump is making hectic efforts to get allies to make an international force to reopen the Straits.

On March 27, the UAE told the US and other Western allies that it would take part in a multinational maritime task force to reopen the Strait of Hormuz. The UAE was trying to push dozens of countries to create a "Hormuz Security Force" to defend the strait from Iranian attacks and escort shipping. The UAE had faced more Iranian attacks than any other country in the region, including Israel. But several US allies have said they have no immediate plans to send ships to unblock the Strait of Hormuz, rebuffing a Trump request for military support to keep the vital waterway open. France said on March 26 it had held talks with around 35 countries seeking partners and proposals for a mission to reopen the strait, but only once the US-Israeli war on Iran ends. By now, Iran had effectively blocked the Strait of Hormuz, spiking energy prices and fueling fears of global inflation.⁴⁴²

The UAE was also desperately working on a UN Security Council resolution with Bahrain to provide any future task force with a mandate, but Russia and China could oppose the move. UN Security Council (UNSC) members had begun negotiating resolutions to protect commercial shipping in and around the Strait of Hormuz, including a Bahraini draft that would authorize the use of "all necessary means". The UAE showed that it may join a US-led effort to protect shipping in the Strait of Hormuz after Iran all but shut the waterway to ships. The waterway was vital to the economy of the UAE, a major oil exporter and trade hub. Iran has repeatedly attacked an Emirati port found outside the Gulf that is used to load oil exports. The UNSC planned to hold closed-door talks on strikes on Iranian civilian infrastructure at Moscow's request.⁴⁴³

Meanwhile, the World Trade Organization warned the global trading system was experiencing the "worst disruption in the past 80 years", while the World Bank said it was prepared to provide immediate financial aid to emerging market countries.

That came as the Organization for Economic Cooperation and Development warned US inflation could hit more than 4% this year because of the spike in crude prices. That compares with its earlier projection of 2.8%. The prospect of another spike in the cost of living led several Federal Reserve officials to express concern about the outlook for the world's top economy and suggested interest rates were unlikely to come down any time soon.

With the economic impact worsening, governments around the world are being forced to act.

Spain approved a sweeping \$5.8 billion package including steep cuts to energy taxes, while Poland's prime minister announced a series of measures to address soaring fuel costs, including reduced taxes and price ceilings. South Korea said it will roll out a \$17 billion "wartime" supplementary budget and expand fuel tax cuts.⁴⁴⁴

Meanwhile, Iran had responded to the US-Israeli strikes with waves of drone and missile attacks not only toward Israel but also against Gulf states hosting US military installations, including Saudi Arabia, widening the conflict's regional impact. The escalation has struck key infrastructure across Gulf countries, including airports, ports, hotels, and oil and military facilities. Disruptions to oil and gas shipments through the Strait of Hormuz have intensified economic concerns. Airspace closures across the region have also forced airlines to cancel

around 40,000 flights, marking the largest disruption to global air travel since the COVID-19 pandemic.⁴⁴⁵

By now, the war had proved to be a disaster for the US as the costs piled up gradually. Already, billions of dollars of highly sophisticated military equipment have been lost or significantly damaged since the U.S. and Israel began striking thousands of targets across Iran more than three weeks ago. Iranian ballistic missiles and drones have caused the bulk of the damage on the ground.

Battle damage and replacement of losses over the first three weeks of the war cost \$1.4 billion to \$9 billion. The higher estimate includes damage to a Qatari radar housed on a US air base in the country.⁴⁴⁶

After US and Israeli strikes in February, which targeted Iranian military infrastructure, Iran retaliated across the region and closed the Strait of Hormuz, triggering a global energy shock. By early April, Trump was threatening to destroy Iranian civilization entirely, deadlines set for March 21, then March 23, then April 7, as diplomats scrambled for an opening.

Pakistan provided that opening. On April 8, Islamabad brokered a conditional two-week ceasefire. Trump confirmed it himself, naming Pakistan strongman Munir and Prime Minister Sharif as the Pakistanis who had persuaded him to stand down. Iranian Foreign Minister Araghchi was equally warm, publicly thanking Pakistan's tireless efforts on behalf of Iran.⁴⁴⁷

With a ceasefire in place, Pakistan moved swiftly to host formal negotiations. On April 11 and 12, delegations from the US and Iran met in Islamabad. The US team was led by Vice President Vance, accompanied by Witkoff and Kushner; Iran sent a delegation headed by Parliament Speaker Qalibaf. The Iranian delegation head said that progress had been made, but the two sides are still far apart on key issues. The US and Iran had recently exchanged views on three key issues, with significant gaps staying. First, the fate of Iran's highly enriched uranium is still unresolved. Trump said that the US would work with Iran to remove its enriched uranium. The US was prepared to unfreeze 20 billion US dollars in Iranian assets in exchange for Tehran's handing over its stockpile, a proposal rejected by Iranian Deputy Foreign Minister Khatibzadeh as "impossible." Second, disagreement persisted over Iran's right to enrich uranium. Trump claimed that Iran had agreed to suspend its nuclear program indefinitely, a claim denied by Iran. Meanwhile, Washington had proposed a 20-year suspension of Iran's enrichment activities, while Tehran countered with a five-year pause, which the US did not accept. Third, tensions remained high over freedom of navigation in the Strait of Hormuz. The U.S. military was preparing to board and potentially seize Iran-linked oil tankers and commercial ships in international waters in the coming days. Despite ongoing contacts and mediation efforts, key differences between the United States and Iran remain unresolved, making a swift agreement unlikely. The talks ran for 21 hours, and while both sides reported progress on most points, two issues proved intractable: the Strait of Hormuz and Iran's nuclear program. No agreement was reached. No memorandum was signed.

Meanwhile, fighting continued in Lebanon. A French soldier serving as part of the United Nations peacekeeping force in Lebanon was killed on April 18. The attack came amid a 10-day ceasefire between Israel and Lebanon announced by Trump after Israel and Lebanon held their first direct talks in decades earlier in Washington, DC.⁴⁴⁸

Iran reversed its decision to reopen the Strait of Hormuz and warned that it would continue to block transit through the strait as long as the US blockade of Iranian ports remained in effect. The escalating standoff over the critical choke point threatened to deepen the energy crisis roiling the global economy and push the two countries toward renewed conflict, even as mediators expressed confidence that a new deal was within reach. Roughly one-fifth of the world's oil passes through the strait, and further limits would squeeze the already constrained supply, driving prices higher once again.

Meanwhile, a 10-day truce between Israel and the Iran-backed Hezbollah militant group in Lebanon appeared to be holding.

The fighting in the Middle East conflict, which is approaching the two-month mark, has killed at least 3,000 people in Iran, 2,300 in Lebanon, 23 in Israel, and more than a dozen in Gulf Arab states. Thirteen U.S. service members have also been killed. Another Israeli soldier dies in combat. It brought the total number of soldiers killed in Lebanon to 15, and was the second soldier killed in combat since the ceasefire.

On April 17, Iran said that vessels could move through the strait in coordination with it and against the payment of a toll.

Huaxia, in his article "Explainer: As ceasefire nears expiry, what divides Iran and U.S.?" published in Xinhua on April 19, 2026, said that:⁴⁴⁹

With a fragile US-Iran ceasefire nearing its expiry, uncertainty once again clouds the outlook for the Middle East. The stop-and-go situation in the Strait of Hormuz -- briefly reopened and then shut again by Iran -- has added to the volatility. The episode highlights deep-rooted disagreements over maritime access and nuclear issues, suggesting tensions may remain elevated in the near term.

Meanwhile, the new control over the Strait had provided leverage to Iran and was acting as a constraint to the US.

An article entitled "For Iran, Flexing Control Over Waterway Is New Deterrent" published in the New York Times on April 19, had very correctly claimed that and that "Iran's government could

emerge from the conflict with a blueprint to keep adversaries at bay, regardless of any restrictions on its nuclear program".⁴⁵⁰

On April 19, Iran's top negotiator said recent talks with the U.S. had made progress, but gaps remained over nuclear issues and the Strait of Hormuz, while President Donald Trump cited "very good conversations" with Tehran despite warning against "blackmail" over the key shipping channel.

Neither side offered any specifics about the state of negotiations, days before a fragile ceasefire in the U.S.-Israeli war against Iran is set to expire.

The war, now in its eighth week, had killed thousands, spread to Israeli attacks in Lebanon, and sent oil prices surging because of the de facto closure of the strait, which before the war carried one-fifth of the world's oil shipments.

Iran announced the temporary reopening of the Strait of Hormuz following a separate US-brokered 10-day ceasefire agreement between Israel and Lebanon.

Trump defended the US blockade and threatened "to start dropping bombs again" unless the countries reached a long-term deal before the ceasefire expired. In an interesting new development, Iran's Supreme National Security Council said Tehran's control over the strait included demanding the payment of costs related to security, safety, and environmental protection services.⁴⁵¹

Concern remained after at least two vessels reported being attacked while trying to transit the waterway. India had expressed deep concern to Iran that two Indian-flagged ships had come under fire in the strait.

CentCom claimed that American forces were enforcing a maritime blockade of Iran, but did not comment on the latest Iranian actions. Tehran's reversal raised the risk that oil and gas shipments through the strait could remain disrupted just as Trump weighed whether to extend the ceasefire.⁴⁵²

Iran said it was tightening control over the Strait of Hormuz on April 18, warning mariners that the vital energy route was again closed, but Trump said Tehran could not extort the US by shutting the waterway.

Tehran said it was responding to a continued US blockade of Iranian ports, calling it a violation of the ceasefire, while Supreme Leader Mojtaba Khamenei said Iran's navy was ready to inflict "new bitter defeats" on its enemies.

Also, Iran said it was reviewing new US proposals after talks with Pakistan Field Marshal Munir, who had been acting as an intermediary between the two countries. Meanwhile, negotiations between Iran and the US continued through Pakistan's diplomacy. Trump said, "We have very good conversations going on. It's working out very well. They got a little cute, as they have been doing for 47 years. Nobody ever took them on. We took them on."

"They have no navy, they have no air force, they have no leaders. They have nothing. Actually ... It is regime change. You call that enforced regime change, but we're talking to them," he added.

"We're talking to them. We're taking a tough stand," Trump said.

"The main thing is that Iran will not have a nuclear weapon. You cannot let Iran have a nuclear weapon, and that supersedes everything else," Trump said.

Trump also said he might end the ceasefire with Iran unless a long-term deal to end the war was agreed before it expired, adding that a US blockade of Iranian ports would continue.

Tehran's renewed tough messaging caused fresh uncertainty around the Iran conflict, raising the risk that oil and gas shipments through the strait could remain disrupted just as Washington weighed whether to extend the fragile ceasefire.

Maritime security and shipping sources said some merchant vessels had received radio messages from Iran's navy saying no ships were allowed through the waterway, reversing April 17's signs that traffic might resume.

On April 18, the Iranian navy warned that any violating vessel would be targeted. Iran considers the US blockade a violation of the ceasefire between the two countries. Two vessels were attacked earlier in the Strait of Hormuz and off Oman's coast, at least one of them by Iranian gunboats.⁴⁵³

An article "Reopening Strait of Hormuz Would Ease Oil Crisis, but Only So Much" published in The New York Times, April 19, 2026, warned that "Analysts said energy and shipping companies would be reluctant to fully restore operations until they were confident that hostilities were over."⁴⁵⁴

By now, Pakistan had appeared as an unlikely mediator in the US-Israel war against Iran. Pakistan, which had been a US ally in the past, seemed to have won over Trump to mediate this conflict. Peace talks were planned in Islamabad. China's president Xi Jinping was also trying to mediate in the Middle East conflict. As the war in the Middle East entered its second month, choking the world's energy supply and sending oil prices soaring, China was now trying to step in as a peacemaker.

Trump kept on making baseless claims. He said US military action in Iran could end in "two to three weeks", but there was no clear sense yet of how that would happen or what would come after.

China joined Pakistan and presented a five-point plan with the aim of bringing about a ceasefire and reopening the vital Strait of Hormuz. China's backing of the Pakistan initiative was very important, as it was providing comprehensive support with the hope that Pakistan could play a more distinctive role. The peace plan was drafted after Pakistan's foreign minister flew to Beijing to ask for Chinese support for the country's efforts to negotiate an end to this conflict. His efforts appear to have worked. China's Foreign Ministry said the two were making "new efforts towards advocating for

peace." The joint statement agreed that dialogue and diplomacy were "the only viable option to resolve conflicts", and it called for waterways, including the blockaded strait, to be protected.

China decided to play the role of peacemaker because the war in Iran jeopardizes regional stability. China needs a stable global economy as it is heavily reliant on selling goods around the world, as it tries to revive an ailing domestic economy. A global slowdown because of an energy shock was going to be tough for China's economy too. Beijing was concerned a little bit worried about a protracted energy shock. China feared that its industrial heartland, which served as the factory of the world, would be affected in the long term if this crisis continued.

The US trade war with China during Trump's first term led many business owners across the country to look for new markets around the world. As a result, China's exports to the Middle East grew twice as fast as its exports to the rest of the world last year. The region had become the fastest-growing market for electric cars, and China was also the largest investor in desalination in the Middle East, where potable water was scarce. As a result of its economic ties, China had cultivated relationships across the region with both US allies, such as Saudi Arabia, and foes, such as Iran.

Tehran and Beijing had a partnership dating back decades. China was Iran's leading trade partner, and it bought around 80% of Iranian oil.

China was the world's biggest importer of crude oil. Therefore, China was cautious about being drawn into broader conflicts. Its priority, both domestically and in foreign policy, was economic development. There was a broad consensus that China should not recklessly get involved in a war. But this approach had its limits. China does not have the military capabilities in the region to step in even if it wished to do so. The US has bases in each of the Gulf states. China's closest base is in Djibouti in East Africa and was only set up in 2017. It was a coordination hub for anti-piracy operations rather than a base for projecting power. During the Israel-Iran war in 2025, China stayed on the sidelines and offered minimal support, revealing the limitations of its role as a partner. China had become a powerful global player driven by strategic interests. It had shown it had some influence in the Middle East, and it certainly had ambitions to gain more leverage in the future.⁴⁵⁵

On April 19, concerns grew that the ceasefire between the United States and Iran might not hold after the U.S. said it had seized an Iranian cargo ship that tried to run its blockade and Iran vowed to retaliate. Efforts to build a more lasting peace in the region likewise appeared to be on shaky ground, as Iran said it would not take part in a second round of negotiations that the U.S. had hoped to begin before the ceasefire expires.

The US had kept a blockade of Iranian ports. At the same time, Iran had lifted and then reimposed its own blockade on marine traffic passing through the Strait of Hormuz. The U. military said it fired on an Iranian-flagged cargo ship as the vessel sailed toward Iran's Bandar Abbas port. "We have full custody of their ship, and are seeing what's on board!" President Trump wrote on social media. Iran's military said the ship had been traveling from China.⁴⁵⁶

Meanwhile, oil prices jumped, and stock markets wobbled, as traders pondered the prospect that traffic in and out of the Gulf would remain at a bare minimum. After a slower start, the S&P 500's advance from the U.S.-Iran war low has caught up with the scale of the rebound from the 2025 tariff-driven selloff low.⁴⁵⁷

Meanwhile, Iran-US peace talks were stalled as Iran had rejected new peace talks, citing the ongoing blockade, threatening rhetoric, and Washington's shifting positions and "excessive demands."

As expected, the US and Iran continued to threaten each other. Trump had warned Iran that the U.S. would destroy every bridge and power plant in Iran if Tehran rejected his terms. Iran had said that if the United States were to attack its civilian infrastructure, it would hit power stations and desalination plants of Gulf Arab neighbors.

The war continued, and by April 19, thousands of people had been killed by U.S.-Israeli strikes on Iran and in an Israeli invasion of Lebanon conducted in parallel since the war began on February 28. Iran responded to the attacks with missiles and drones against Israeli and nearby Arab countries that host US bases. had created the most severe shock to global energy supplies in history, sending oil prices surging because of the de facto closure of the strait. Iraq, Kuwait, Saudi Arabia, and the UAE lost 8 million bpd of crude production in March.

Meanwhile, talks continued between Iran and the US. Iran's parliament speaker, Qalibaf, said the two sides had made progress but were still far apart on nuclear issues and the Strait.

Meanwhile, European allies, repeatedly criticized by Trump for not aiding his war effort, worry that Washington's negotiating team is pushing for a swift, superficial deal that would require months or years of technically complex follow-on talks.⁴⁵⁸

On April 19, European allies feared an inexperienced US negotiating team was pushing for a swift, headline-grabbing framework deal with Iran that could entrench rather than resolve deeper problems, diplomats with experience dealing with Tehran said. They worry Washington, eager to claim a diplomatic win for Trump, could lock in a superficial agreement on Iran's nuclear program and sanctions relief, then struggle through months or years of technically complex follow-on talks. The concern was not that there would not be an agreement. It was that there would be a bad first agreement that created endless downstream problems."⁴⁵⁹

Diplomats from France, Britain, and Germany said they had been sidelined. From 2013 to 2015, the three worked with the US to secure a deal on curbing Iran's nuclear program in exchange for sanctions relief, known as the Joint Comprehensive Plan of Action (JCPOA). Trump withdrew from the accord, which had been the signature foreign policy agreement of his predecessor Barack Obama, in 2018, during his first term, calling it "horribly one-sided".

Meanwhile, after 40 days of airstrikes, US and Iranian negotiators opened talks in Islamabad earlier, again focused on the familiar trade-off nuclear restrictions for economic relief. Diplomats say deep mistrust and sharply different negotiating styles raised the risk of a fragile framework neither side could sustain politically.⁴⁶⁰

The diplomats said a skeletal agreement may be achievable, built around a nuclear package and an economic package. But they warned the nuclear part remained by far the most contentious. Talks were focusing on Iran's stockpile of 970 pounds of uranium enriched to 60%, material that could be used for several nuclear weapons if further enriched. The favored option was "downblending" inside Iran under International Atomic Energy Agency (IAEA) supervision.

Another is a hybrid approach, with some material shipped abroad. Turkey and France have been mentioned as destinations. Shipping material to the United States would be politically difficult for Iran, while Russia is unattractive to Washington, two of the diplomats said.

Even those options would require lengthy negotiations over recovering material buried by airstrikes, verifying quantities, and transporting it securely. Iran has also floated storing material abroad for a fixed period. Whatever happened now was only a starting point as the 2015 JCPOA ran to 160 pages.

Beyond stockpiles lay the deeper dispute over Iran's right to enrich uranium at all. Trump had publicly pushed for zero enrichment, while Iran insists it had the right to enrich uranium for civilian purposes and denies seeking a bomb. One compromise would be a temporary moratorium followed by resumption at very low levels under strict conditions.

Europeans stressed that a significant role for the IAEA, including intrusive verification and unrestricted access, was essential.⁴⁶¹

The economic track focused on lifting sanctions and unfreezing Iranian assets. In the short term, Iran wanted access to limited frozen funds overseas. Broader sanctions relief would come later and require European buy-in, as Iranian leaders see European trade as critical over the long term. Washington is again separating an agreement in principle from its painstaking follow-up, an approach they say risks misreading Iranian political culture.⁴⁶²

The war had hardened Iran's stance, diplomats said, showing it can absorb pressure even as it seeks financial relief. Tehran's top demand was a non-aggression guarantee after being attacked by the U.S. and Israel during earlier diplomatic efforts.

The concern was shared among U.S. allies. Gulf states want Iran's ballistic missiles and proxy activities addressed, while Israel was pushing for maximal constraints. Iran, by contrast, sought its remaining missile capability as a vital deterrent after the war degraded its forces. Diplomats said demanding total abandonment would be unrealistic without broader security guarantees.

Washington's redlines included ending uranium enrichment, dismantling major enrichment facilities, recovering highly enriched uranium, and accepting a broader de-escalation framework involving regional allies.⁴⁶³

Pakistan remained involved in diplomacy with the premier Sharif, having concluded a three-nation tour in the Middle East, and the strongman Munir visited Iran. An upbeat editorial "Round two? Published in Dawn on April 20, 2026, it said that."⁴⁶⁴

The Pakistani civil and military leadership have outdone themselves. They have already earned much respect and gratitude not just on both sides engaged in the war, but also in world capitals, weary and worried about where the hostilities had seemed headed before the ceasefire was called. The leadership is now aiming for the ultimate goal: a formal agreement or memorandum between the US and Iran that brings lasting peace to the region...Both sides, it seems, will need to make some more sacrifices if they wish for the hostilities to stop. If efforts to bring Iran and

America to a long-term settlement are successful, and a treaty or a precursor to one is signed in Islamabad, Pakistan will deserve credit for pulling off what had once seemed highly improbable.

Maleeha Lodhi, in her excellent article “The fallout,” published in Dawn, April 20, 2026, said that:⁴⁶⁵

War has changed the strategic equation in the Middle East. Trust in the US security umbrella has been shaken as GCC countries have seen that in a crisis, Washington is unable or unwilling to protect them, and Israel’s security interests have primacy over theirs. This will force them to review their overreliance on a single power, re-evaluate their security assumptions, consider strategic repositioning, adopt hedging strategies, and diversify their security arrangements. The Saudi-Pakistan defence agreement serves as an example of diversification by KSA. GCC states’ vulnerabilities laid bare in the war will urge them, albeit in the long run, to mitigate these by evolving new security mechanisms, especially as the GCC’s collective security mechanism came up short. Members of ‘Quad’ — Pakistan, Saudi Arabia, Turkiye, and Egypt — may in the future want to turn their informal group into a regional security arrangement. Iran, battered but undefeated, could appear strengthened from the war with its control over the Strait of Hormuz, giving it strategic leverage while it rebuilds its defense capabilities. Whatever the Strait’s future status, it is now clear that Iran has the capacity to control the Middle East’s energy exports. Iran’s stronger position and enhanced leverage may encourage GCC states to seek a modus vivendi and normalization of ties with Tehran. Saudi Arabia, after all, had sought a rapprochement with Iran before the region plunged into war. The war has also accelerated certain trends that were already in play. Among the most significant is the decline in America’s regional dominance and global standing.

Oil prices rose to \$96 a barrel after the U.S. attacked and seized an Iranian cargo ship. President Trump said American negotiators were heading to Pakistan for more peace talks.⁴⁶⁶

There was still a glimmer of hope. Despite no immediate prospects of direct talks between Iran and the US, diplomacy remained very much alive, as a flurry of behind-the-scenes activity suggested a serious push to seek a permanent end to the war.

In late April, Iran's Foreign Minister Araghchi returned to Islamabad after visiting Oman, as part of ongoing diplomatic engagements. Araghchi also carried written messages outlining Tehran's position on key issues, including its "nuclear red lines" and the Strait of Hormuz. The communication was not part of formal negotiations but an effort to clearly convey Iran's stance amid ongoing diplomatic efforts.

What had appeared so far was that several regional countries were now actively involved in diplomatic efforts. Following his return from Oman, the Iranian foreign minister also held separate contacts with his Qatari and Saudi counterparts in what was being seen as an attempt to develop a broader regional framework ahead of any potential deal between Tehran and Washington.

Gulf countries, which had been directly affected by the Iran-US-Israel conflict, both through attacks and the fallout on energy markets, are eager to ensure their concerns are reflected in any future agreement. Turkey, too, was playing an active role in de-escalation efforts, with its foreign minister engaging US negotiators as well as Iranian and Omani counterparts to discuss the evolving situation.⁴⁶⁷

Pakistan continued to remain at the center of these diplomatic maneuvers. There appeared to be a deliberate effort to keep discussions concealed, as excessive media attention was seen as counterproductive. Although the US had cancelled plans to send its team of negotiators to Islamabad, Trump's messaging had still been cautiously open. Trump said the war with Iran would end soon and signaled that Washington was still open to engagement, saying, "If the Iranians want to talk, they can reach out to us."

Trump again commended Pakistan's efforts for peace talks, saying that he has "great respect" for Pakistan. "Great respect for Pakistan, but I will, because they've been terrific. They've really tried, and they'll stay involved," he said.

Despite the absence of direct talks for now, Trump had not shown any intention to resume hostilities or end the ceasefire, reinforcing the sense that space was being preserved for diplomacy. Given the high stakes, both in terms of global peace and the economy, no party wanted a return to conflict.

Iranian President Pezeshkian, meanwhile, told Prime Minister Sharif by phone that Tehran would not enter "imposed negotiations" under threats or blockade, according to a statement from the Iranian government. He said the US should first remove obstacles, including its maritime blockade, before negotiators could begin laying the groundwork for a settlement.

There was also a growing view that the decision to keep the ceasefire open-ended is part of a broader understanding to give diplomacy sufficient time to address complex issues. It was clear that the next round of talks between Iran and the US may take place once broader issues are addressed through backchannels.⁴⁶⁸

As expected, Iranian Foreign Minister Araghchi addressed the failure of the latest round of negotiations, pinpointing American demands as the main reason behind the breakdown.

"Americans' approach led to the previous round of talks failing to meet its objectives, despite the progress made. This was due to the excessive demands they made and the wrong approaches they adopted," he said.⁴⁶⁹

Meanwhile, Pakistani mediators pushed to keep peace talks between Tehran and Washington alive.

Surprisingly, Trump scrapped a planned trip to Islamabad by his envoys Steve Witkoff and Jared Kushner.

In a sign that efforts were ongoing, Iran had sent "written messages" to the Americans via mediator Pakistan outlining red lines, including nuclear issues and the Strait of Hormuz. Iran had

sent a new proposal to reopen the Strait of Hormuz and end the war, with nuclear negotiations postponed for a later stage.

A ceasefire in the US-Israeli war with Iran has so far held, but its economic shockwaves have continued to reverberate globally. Iran has sealed off the strait, cutting flows of oil, gas, and fertilizer and sending prices soaring, raising fears of food insecurity in developing countries. At the same time, a US blockade of the strait is in place.

Meanwhile, backchannel diplomacy expanded across the region. Hopes for a second round of talks in Pakistan had centered on the planned visit by Witkoff and Kushner, but Trump cancelled the trip after Iranian state television said Araghchi had no plans to meet US officials there.

Trump said that if Iran wanted the talks, "they can come to us, or they can call us". Trump faces domestic pressure as fuel prices rise following Iran's closure of Hormuz, with midterm elections due in November. Polls show the war is unpopular among Americans.

Asked whether cancelling signaled renewed fighting, Trump said: "No, it doesn't mean that." Later, Araghchi met Pakistan's strongman Munir, Prime Minister Sharif, and Foreign Minister Dar, before travelling to Oman and returning to Islamabad.

Meanwhile, the IRGC said they had no intention of lifting their blockade.

"Controlling the Strait of Hormuz and maintaining the shadow of its deterrent effects over America and the White House's supporters in the region is the definitive strategy of Islamic Iran," the IRGC said. The US had imposed a blockade of Iranian ports in retaliation.

Meanwhile, Israel's strikes in Lebanon continued. Israel and Hezbollah traded blame over violations of the fragile ceasefire in Lebanon, with Prime Minister Netanyahu saying the military was "vigorously" targeting the Iran-backed militia as both sides claimed new attacks.

Hezbollah drew Lebanon into the Middle East war on March 2 by firing rockets at Israel to avenge the death of Iran's supreme leader Ali Khamenei, with Israel responding with strikes and a ground invasion.

But claims that both sides have breached a 10-day ceasefire agreed earlier this month have continued.

Netanyahu said that Israel must have freedom of action not only to respond to attacks, but also to pre-empt immediate threats and even emerging threats.⁴⁷⁰

Meanwhile, oil prices jumped almost 3% on April 27, 2026, as peace talks between the United States and Iran stalled and shipments through the Strait of Hormuz remained limited, keeping global oil supplies tight. The Brent crude benchmark rose \$3, or about 2.9%, to \$108.36 a barrel, which was the highest in three weeks. US West Texas Intermediate was up \$2.45, or 2.6%, at \$96.85. Brent and WTI gained 17% and 13%, respectively, their biggest weekly gain since the start of the war.⁴⁷¹

Hopes of reviving peace efforts receded when US President Donald Trump said Iran could telephone if it wanted to negotiate an end to their two-month war.

Meanwhile, Iranian Foreign Minister Araqchi shuttled to and from mediators Pakistan and Oman before flying to Russia, with the US and Iran still seemingly far apart on issues including Iran's nuclear ambitions and passage through the Strait of Hormuz.

On April 21, Trump extended the truce indefinitely to give Iran time to present a "unified proposal".

Energy prices have swung wildly since the start of the conflict, while Brent crude has risen back above \$100 a barrel since the ceasefire came into effect on April 8.

The Strait of Hormuz has been effectively shut after Tehran threatened to attack vessels that try to cross it in retaliation against US-Israeli strikes. About a fifth of the world's oil and liquefied natural gas (LNG) supplies normally pass through the strait.⁴⁷² The strait is 21 miles wide at its narrowest point, with the shipping lane just 2 miles wide in either direction. Shipping through the strait has come to a halt, with only a few vessels transiting, compared with around 125 to 140 daily passages before the war began.⁴⁷³ The de facto closure of the Strait set up a global crisis. The diplomatic stand-off meant that every day, 10-13 million barrels of oil did not get to the international market, worsening an already tight oil balance. Therefore, the oil prices increased. Tehran has closed the Strait of Hormuz, while Washington has imposed a blockade of Iran's ports. Traffic through the waterway remained limited.

Goldman Sachs raised its oil price forecasts for the fourth quarter to \$90 a barrel for Brent crude and \$83 for WTI, citing reduced output from the Middle East. "The economic risks are larger than our crude base case alone suggests because of the net upside risks to oil prices, unusually high refined product prices, product shortages risks, and the unprecedented scale of the shock," GS analysts said on April 26.⁴⁷⁴

Meanwhile, the US has been enforcing a blockade of Iranian ports to exert pressure on Iran to agree to its terms. As expected, the move has infuriated Iran.

Earlier, the direct peace talks held in Pakistan in April between the US and Iran had failed. However, Pakistan had continued to mediate to reach an understanding between Iran and the US and remained optimistic. While Islamabad is still at the forefront of mediation efforts, regional players, chiefly Qatar and Saudi Arabia, have increasingly complemented Pakistan's diplomatic push. Back-channel talks continued. Trump said on May 4 that the US held "very positive discussions" with Iran.⁴⁷⁵

Meanwhile, there was growing evidence that Iran's economy is in terrible trouble. The war's costs include a million unemployed, soaring food prices, and an internet shutdown that had stifled the online economy. Inflation was rampant, and staples like red meat were unaffordable. Middle Eastern media reports warned of growing shortages and threats to food security. Some reports predict the Iranian economy could only survive for a few weeks. Trump repeatedly claimed Iran's inability to export oil meant it would have to halt production and risk huge damage to oil wells that could take years to fix.⁴⁷⁶

Maleeha Lodhi, in her excellent article “The fallout,” published in Dawn, April 20, 2026, said that:⁴⁷⁷

Whatever way the Iran war ends, its consequences will be felt for a long time to come. Its security, economic, and diplomatic fallout have global implications. This will urge countries to reshape policy priorities in the face of changing realities and fragmenting international order. First, consider the economic fallout of the war. The economic toll will obviously be heaviest in the Middle East. But the damage to critical energy infrastructure and disruption in oil shipments and energy supplies have far-reaching global ramifications, affecting countries across the world. The price of oil and gas has soared, and international energy markets were thrown into turmoil by the war, from which the global economy will take time to recover. The International Energy Agency has described this as “the largest supply disruption in the history of the global oil market.” The world also confronts a shortage of natural gas. The destruction of gas facilities means that fully liquified natural gas, or LNG, production capacity could take years to be rebuilt. The energy crisis has forced countries to raise prices, impose rationing, and adopt austerity measures to reduce demand. What this means is described by the IMF as an “abrupt darkening” of the outlook for the global economy dominated by downside risks and involving difficult trade-offs for countries. Its latest forecast in the World Economic Outlook warns of slower growth and higher inflation. The Fund estimates global growth at only 3.1 per cent this year, with headline inflation projected to rise, in what it calls a “sharp deviation” from the global disinflation trend of recent years. This could push the world into a recession. The adverse economic impact on countries, of course, varies, with those in the Global South and other net energy importers affected the most. A UNDP report warns the war’s fallout could drive over 32 million people worldwide into poverty. The triple shock involving energy, food, and weaker growth will hit the poorest countries the hardest and mean ‘development in reverse’ for them. Meanwhile, the head of the IMF, Kristalina Georgieva, has said that even if a durable peace is achieved, the war will permanently “scar” the global economy and entail lasting damage to living standards. The security, economic, and diplomatic consequences of the Iran war will be felt for a long time to come. As for the diplomatic fallout, this has many dimensions, but an immediate consequence is the unprecedented global isolation of Israel. Coming on the back of waning international support due to its two-year genocidal war in Gaza, Israel’s aggression against Iran has exposed it to worldwide condemnation and erosion of support from long-standing European allies. Spain appeared as the strongest critic of Israel, imposing an arms embargo on Tel Aviv. Italy suspended a defense agreement with Israel. France denied the use of its airspace to the US to transport weapons to Israel. Even Israel’s biggest European backer, Germany, assailed Israeli policy in the West Bank. The electoral defeat of Viktor Orbán in Hungary deprived Israel of its closest European friend. All European countries criticized Israel’s de facto annexation of the occupied West Bank. Meanwhile, a Citizens’ Initiative calling for suspension of the EU-Israel Association Agreement has reached one million signatures, across all 27 member states, which will trigger a response from the European Commission and European Parliament. In the US, public support for Israel has plunged dramatically. Successive opinion polls confirm the shift in opinion. In the latest survey by Pew Research Centre, 60pc of

Americans say they have an unfavorable view of Israel, which was 40pc three years ago. Young voters have a particularly negative view of Israel. Prominent figures in Trump's MAGA base have also turned against Israel. The Iran war reinforced the trend underway during Israel's Gaza conflict, when surveys found more Americans sympathize with Palestinians than with Israel. Plummeting public support for Israel has implications for future ties between Tel Aviv and its superpower backer and points to Israel's reputational damage in the US. Also significant is the fallout of the Iran war on the transatlantic alliance. Relations between the US and Europe had already come under strain from Trump's tariff war, his criticism of European countries as freeloaders, and his questioning of NATO's value. The rift became more pronounced after the US-Israel attack on Iran. Despite Trump's pleas to them for help in the conflict, including by sending warships to break Iran's chokehold over the Strait of Hormuz, they declined. Frustrated by this, Trump lashed out at Nato countries, called them cowards, and threatened to abandon NATO. Washington's European allies were neither consulted when Trump decided to go to war, nor did they want to enter a conflict they did not endorse and which several European leaders called "illegal." Finally, there is a fallout in the region's security architecture and power dynamics. War has changed the strategic equation in the Middle East. Trust in the US security umbrella has been shaken as GCC countries have seen that in a crisis, Washington is unable or unwilling to protect them, and Israel's security interests have primacy over theirs. This will force them to review their overreliance on a single power, re-evaluate their security assumptions, consider strategic repositioning, adopt hedging strategies, and diversify their security arrangements. The Saudi-Pakistan defence agreement serves as an example of diversification by KSA. GCC states' vulnerabilities laid bare in the war will urge them, albeit overall, to mitigate these by evolving new security mechanisms, especially as the GCC's collective security mechanism came up short. Members of 'Quad' — Pakistan, Saudi Arabia, Turkiye, and Egypt — may in the future want to turn their informal group into a regional security arrangement. Iran, battered but undefeated, could appear strengthened from the war with its control over the Strait of Hormuz, giving it strategic leverage while it rebuilds its defense capabilities. Whatever the Strait's future status, it is now clear that Iran has the capacity to control the Middle East's energy exports. Iran's stronger position and enhanced leverage may encourage GCC states to seek a modus vivendi and normalization of ties with Tehran. Saudi Arabia, after all, had sought a rapprochement with Iran before the region plunged into war. The war has also accelerated certain trends that were already in play. Among the most significant is the decline in America's regional dominance and global standing.

Oil prices rose to \$96 a barrel after the U.S. attacked and seized an Iranian cargo ship. President Trump said American negotiators were heading to Pakistan for more peace talks.⁴⁷⁸

Despite no immediate prospects of direct talks between Iran and the US, diplomacy stays very much alive, as a flurry of activity suggests a serious push to seek a permanent end to the war. What has appeared so far is that several regional countries are now actively involved in diplomatic efforts. Following his return from Oman, the Iranian foreign minister also held separate contacts with his Qatari and Saudi counterparts in what is being seen as an attempt to

develop a broader regional framework ahead of any potential deal between Tehran and Washington.

Gulf countries, which have been directly affected by the Iran-US-Israel conflict, both through attacks and the fallout on energy markets, are eager to ensure their concerns are reflected in any future agreement.

Turkey, too, was playing an active role in de-escalation efforts, with its foreign minister engaging US negotiators as well as Iranian and Omani counterparts to discuss the evolving situation.

Pakistan continues to remain at the center of these diplomatic maneuvers. While a week-long security lockdown in Islamabad has now been lifted, the possibility of eventual US-Iran direct talks cannot be ruled out.

There appears to be a deliberate effort to keep discussions secret, as excessive media attention is seen as counterproductive. Although the US has cancelled plans to send its team of negotiators to Islamabad, Trump's messaging has still been cautiously open.

Recently, Trump said the war with Iran would end soon and signaled that Washington was still open to engagement, saying, "If the Iranians want to talk, they can reach out to us."

Trump again commended Pakistan's efforts for peace talks, saying that he has "great respect" for Pakistan. Despite the absence of direct talks for now, Trump has not shown any intention to resume hostilities or end the ceasefire, reinforcing the sense that space is being preserved for diplomacy. Diplomatic sources said that given the high stakes, both in terms of global peace and the economy, no party wants a return to conflict.

Iranian President Pezeshkian, meanwhile, told Prime Minister Shehbaz Sharif by phone that Tehran would not enter "imposed negotiations" under threats or blockade, according to a statement from the Iranian government. He said the US should first remove obstacles, including its maritime blockade, before negotiators could begin laying the groundwork for a settlement.

There is also a growing view that the decision to keep the ceasefire open-ended is part of a broader understanding to give diplomacy sufficient time to address complex issues. The next round of talks between Iran and the US may take place once broader issues are addressed through backchannels.⁴⁷⁹

A ceasefire in the US-Israeli war with Iran had so far held, but its economic shockwaves had continued to reverberate globally. Iran had sealed off the strait, cutting flows of oil, gas, and fertilizer and sending prices soaring, raising fears of food insecurity in developing countries. At the same time, a US blockade of the strait was in place. Washington has imposed a blockade of Iran's ports. Traffic through the waterway remained limited, with only one oil products tanker entering the Gulf.

Hopes for a second round of talks in Pakistan had centered on the planned visit by Witkoff and Kushner, but Trump cancelled the trip after Iran said Araghchi had no plans to meet US officials there....⁴⁸⁰

Meanwhile, Iranian Foreign Minister Araqchi shuttled to and from mediators Pakistan and Oman before flying to Russia. The US and Iran were still seemingly far apart on issues including Iran's nuclear ambitions and passage through the Strait of Hormuz.

Goldman Sachs raised its oil price forecasts for the fourth quarter to \$90 a barrel for Brent crude and \$83 for WTI, citing reduced output from the Middle East.⁴⁸¹

Trump said on May 1 he was not satisfied with the latest Iranian proposal for talks on the Iran war, while Iran's foreign minister said Tehran was ready for diplomacy if the United States changes its approach.

Trump's comments showed the deadlock over the two-month-old war is likely to persist, even as he looks to end a conflict that stays deeply unpopular among Americans.

Meanwhile, US relations with its traditional allies were further strained over Iran on Friday, as the United States announced it was withdrawing 5,000 troops from Germany. Trump had threatened a drawdown over differences with German Chancellor Friedrich Merz, who said the Iranians were humiliating the United States and that the Americans lacked a withdrawal plan.⁴⁸²

More than two months into a conflict that has failed to deliver a decisive military or diplomatic win, President Donald Trump faces the risk that a standoff with Iran will drag on indefinitely and leave an even bigger problem for the U.S. and the world than before he launched the war.

With both sides outwardly confident they hold the upper hand and their positions far apart, there is no obvious off-ramp in sight, even as Iran gave a fresh proposal to restart negotiations. Trump quickly rejected.

Those costs highlight a deeper problem: the war has failed to achieve many of Trump's stated goals.

While there is little doubt that waves of U.S. and Israeli strikes heavily degraded Iran's military capabilities, many of Trump's often-shifting war aims - from regime change to shutting Iran's path to a nuclear weapon - remain unfulfilled.

Fears for a more protracted deadlock have grown since Trump called off a trip by his negotiators to Islamabad last weekend and then dismissed an Iranian offer to halt the war, suspended since April 8 under a ceasefire agreement.

Tehran proposed setting aside discussion of its nuclear program until the conflict is formally ended and a deal is reached on reopening the Strait of Hormuz. That was a non-starter for Trump, who has demanded the nuclear issue be dealt with at the outset.

There was a glimmer of hope when Tehran sent a revised proposal through Pakistani mediators, causing a drop in global oil prices that had risen sharply since Iran effectively closed the strait. Trump told reporters he was "not satisfied" with the offer, though he said there were ongoing contacts by phone.⁴⁸³

Analysts warn of prolonged deadlock, risking a 'frozen conflict' and strained US alliances. The conflict is also pressuring Trump's administration ahead of crucial midterm elections in November, as rising gas prices hit voters' pockets. A failure to wrest the vital oil-shipping waterway from Iranian control at the conclusion of the conflict would be a major blow to Trump's legacy.

Meanwhile, the White House spokesperson continued to make outlandish statements. Wales said Iran's "desperation" is increasing due to military and economic pressure, and Trump "holds all the cards and has all the time he needs to make the best deal."⁴⁸⁴

Though the US and Iran had suspended hostilities since an April 8 ceasefire, the two countries remained at odds over a range of issues, including Iran's nuclear ambitions and control over the Strait of Hormuz, and the two sides had yet to agree to a second meeting following a brief summit of senior officials in Islamabad in April.

With negotiations deadlocked, some analysts have suggested war could devolve into a frozen conflict that would defy a permanent solution. That could prevent Trump from significantly scaling down forces in the Middle East.

The US was already paying new strategic costs. Those include fractures with traditional European allies, who were not consulted before Trump went to war. He has harshly criticized NATO partners for not sending their navies to help open the strait, and in the past week, he spoke about drawing down troops in Germany, Spain, and Italy.

Trump also must deal with a more hardline Iranian leadership, dominated by the Islamic Revolutionary Guard Corps, which took over after U.S.-Israeli strikes killed several figures, including Supreme Leader Ayatollah Ali Khamenei. The president's call at the start of the conflict for the Iranian people to overthrow their rulers has gone unheeded.⁴⁸⁵

At home, Trump is under pressure to end a war that has dragged his approval rating to the lowest level of his term – 34%, according to a Reuters/Ipsos poll – and spiked gasoline prices above \$4 a gallon ahead of the midterms, in which Republicans are at risk of losing control of Congress.

A second White House spokesperson, Taylor Rogers, said Trump was committed to keeping his party's congressional majority and that high gasoline prices were only "short-term disruptions" that would be overcome as the conflict subsides.

The Iranians, however, were mindful of Trump's domestic troubles and may be prepared to wait him out, but the question remained how long they could stave off economic calamity. But Iran was not falling apart; it was merely playing for time.⁴⁸⁶

Stephen Collinson, in his excellent article “Trump is betting his blockade will defy history and break Iran,” CNN, argued that:⁴⁸⁷

The longer the war goes on, and Iran keeps the Strait of Hormuz closed, the greater the damage to the US. The Islamic Republic’s persistence and stubbornness have become legendary. ...the latest US administration to believe, wrongly, that a pressure campaign could force Iran to give in.... Trump’s confidence also reflects another familiar Washington trend — a never-reconciled belief, especially prevalent among conservatives, that the Iranian economy and regime are perpetually about to collapse. “They must cry uncle; that is all they must do. Just say, ‘We give up, we give up,’” the president said in the Oval Office on Wednesday. If Iran does so, Trump could break a futile cycle of history and finally end America’s half-century duel with a bitter enemy. If it fails, he will only have proved yet again that the Islamic Republic’s willingness to take punch after punch can neuter far greater American power.

One unintended consequence of the US-Israeli war with Iran is that instead of collapsing, the Islamic regime has become more embedded. Fergal Keane, “Some Iranians fear the regime is now more entrenched - and ready for revenge,” BBC News, May 4, 2026, explains that:⁴⁸⁸

Protests have come and gone. A war. Then a ceasefire. But the regime of the Islamic Republic has endured. Iran's late Supreme Leader Ayatollah Ali Khamenei was succeeded by his son Mojtaba. It is impossible to tell the scale of support for the regime across Iranian society. There are regular public displays of solidarity organized by its supporters. By contrast, opposition rallies are banned..... There is a recurring fear: once the war is finally over, the state will escalate its campaign of internal repression. According to the Washington-based Human Rights Activists News Agency (HRANA), more than 53,000 people were arrested during the anti-regime protests last January, and before the outbreak of the war. Since the war began, many thousands more have been believed to have been detained. There has also been a record number of executions of political detainees - 21 people hanged during the war. It is the highest number in such a brief period for over 30 years. Nine of those hanged were connected to the January protests, 10 were for alleged membership of opposition groups, and two were accused of spying....Human rights activists reported four executions so far this year of people accused of links to the Mossad, Israel's foreign intelligence service. Independent journalists are among those who fear being targeted by accusations that they are helping the United States or Israel. There have been many arrests of people accused of sending material to foreign media seen as hostile to the state.

Earlier, the US floated an offer in the hopes of reopening negotiations. The US and Iran were working on a short-term agreement to end hostilities for another 30 days and reopen the Strait of Hormuz. During the 30 days, both would try to reach a comprehensive deal.⁴⁸⁹ Many proposals went back and forth from Iran and the US through Pakistan. Iran and the US discussed a short-term agreement on the framework for a potential permanent deal. A key obstacle was the US demand for commitments in advance on the fate of Iran’s nuclear program and its stockpile of highly enriched uranium. The US continued to insist that Iran agree in principle to hand over the stockpile to the US, close three nuclear facilities, and suspend enrichment for 20 years. However, Iran had proposed instead that some of the uranium be

diluted, and the rest be transferred to a third country, Russia, and that enrichment be suspended for 10 to 15 years, with no mention of the three facilities. The high-level plan had three at once actionable points: the lifting of the U.S. blockade on Iranian ships and ports, the opening of the strait to commercial traffic, and an end to the fighting. The major points of conflict that have so far stymied negotiations would be left to be sorted out in the next 30 days. Those include, crucially, the future of Iran's nuclear program, sanctions relief for the country, and the release of Iranian funds frozen overseas. Iran would agree to never seek a nuclear weapon and would agree to suspend enrichment of uranium, but the details, including the duration of that pause, are unresolved.⁴⁹⁰

On May 7, Iran and the US blamed each other for strikes on each other. Yet, Trump said the cease-fire with Iran was still in effect. His response towards Iran was measured, signaling his intent to uphold the ceasefire and de-escalate tensions, with Iran's cooperation.⁴⁹¹

Finally, Iran, on May 10, released a response focused on ending the war on all fronts, especially Lebanon, where US ally Israel is fighting Iran-backed Hezbollah militants.

Tehran's demands include: an end to the war across the region, Iranian sovereignty over the Strait of Hormuz, the US to end its naval blockade, guarantee no further attacks, lift sanctions, end a US ban on Iranian oil sales, and the release of frozen assets, compensation for war damage. The US had proposed an end to fighting before starting talks on more contentious issues, including Iran's nuclear program.⁴⁹²

On May 11, Iran said the US continues to have "unreasonable demands", adding that Iran's response to the US proposal, which Tehran made on May 10, "was not excessive". US President Trump slams Iran's response to Washington's peace proposal as "totally unacceptable".⁴⁹³ Meanwhile, Israel's bombardment of Lebanon continues as Hezbollah claims more attacks on Israeli troops. Israeli attacks on May 10 and May 11 have killed 51 people.⁴⁹⁴

Trump's swift rejection of Iran's response had sent oil prices surging on May 11, amid concerns the 10-week-old conflict would drag on, keeping shipping through the Strait of Hormuz paralyzed. Oil prices jumped more than \$4 a barrel on May 11 following news of the continued stalemate.

Meanwhile, surveys show the war was unpopular with US voters, facing sharply higher gasoline prices less than six months before nationwide elections that will decide whether Trump's Republican party keeps control of Congress.

The US had also found little international support, with NATO allies refusing calls to send ships to open the Strait of Hormuz without a full peace deal and an internationally mandated mission.

The Iran war must end now for the sake of the region and even beyond. The way Trump is conducting diplomacy is not proper. He is not asking for professional help in the matter and instead depends on family and friends. This is leading to poor decision-making in the White House. Today, Trump is searching for a decent withdrawal plan and a face-saving for his beleaguered administration. The Trump administration underestimated the resolve of the

Iranians to defend their country from US and Israeli aggression. Plus, the reliance on air strikes to defeat Iran was a mistake. The economic pressure is not working as well.

All wars are politics by other means, as Clausewitz declared a long time ago, and this war is no exception. The problem for the US is that the Trump administration does not have a war strategy. Israel manipulated it to fight its war with Iran. There was no immediate and imminent threat to the USA before the war began a month ago. The US will have to pay a prohibitive cost for the blunder.

The US should end the war despite the aims of its partner, Israel. The Trump administration should now grasp the opportunity and make peace with Iran. There is no doubt that the Iranian regime is extremely repressive, cruel, and corrupt, but that does not mean that the US should replace it. Anyways, a replacement of the Iranian regime would require a massive ground invasion, which is not even contemplated by the Trump administration. Therefore, the idea of whether there is any should be discarded at once. After all, the US does business with other even more repressive regimes like India, Egypt, North Korea, China, and even Israel itself. It is not the responsibility of the US to intervene in other nations' internal affairs and set things right, as it sees it. This would be a violation of international law and the UN charter, also. It is time for the US to make peace with Iran by recognizing the Islamic regime, no matter how much it is disliked by the American establishment. The American people overwhelmingly want peace, not war with Iran. Therefore, the Trump administration should have taken the difficult path of diplomacy with Iran to resolve the outstanding nuclear issue. Unfortunately, that did not happen as both the US and Israel had decided otherwise. Many American leaders could not come to understand the true nature of the political situation and the political compulsions of the Iranian nation. The Trump administration faced a choice, and it erred because it listened to only favored viewpoints. In hindsight, Trump should have ignored such hawkish views. But they were not, and that was the problem with the current Trump administration. Too many extremist views got accepted in their top decision-making circles. Obviously, that made for bad policy decisions like the mess in the war in Iran.

The conflict continued unabated. Given the recent developments in the conflict, the chances of a breakthrough are very bleak. But back channels are still in operation and must be kept open in the future. Countries do not have permanent enemies, as they have only national interests to protect. In the Second World War, Germany and Japan were mortal enemies of the US, but now they are close friends. Circumstances can change, and even the US can become friends with Iran, as before the Islamic Republic was founded. It is possible that a peace deal between the US and Iran can happen. However, a peace deal between Israel and Iran is not possible. Israel is committing aggression in the region and is being duly opposed by Iran. The enmity between Israel and Iran is very deep. Even if there is a peace deal with the US, Israel will remain bent on the destruction of Iran. Eventually, the US can obviously stop it. Regional politics are changing. A strategic alliance of Russia-China-Iran has appeared. The nature of international politics dictates that China and Russia will help Iran against the US-Israeli alliance. Meanwhile, Iran will do whatever it takes to survive. Iran will be victorious if it can survive the joint US-Israeli aggressions of the war.

External factors are also supportive of the continuation of the Iranian regime. International politics is becoming both intense and complicated now. If Iran falls, both China and Russia lose a valuable strategic partner. Therefore, both will continue to back Iran only because it is an adversary of the US, which happens to be their adversary as well. In other words, China and Russia will not let Iran collapse altogether. Russia is already helping Iran with intelligence sharing and upgrading drone technology. China is also supplying some weapons. If the war prolongs any further, both will ramp up their support to Iran, making sure it survives the US-Israeli strikes.

Despite heavy losses, the Iranian regime is intact. It has shown remarkable resilience in the face of Israeli and US aggression. The Islamic regime will remain intact and powerful as it has a sturdy foundation in the Iranian state and society. It has built a system that now sustains it. Benoit Faucon, in his article "The Web of Patronage That Keeps Iran's Regime in Control" published in the Wall Street Journal, March 29, 2026, explains that:⁴⁹⁵

Iran's sprawling security apparatus is not solely held together by ideology. It is underpinned by a system of economic incentives that makes the regime's collapse a direct threat to the livelihood of its acolytes. Since its founding, the Islamic Republic has built a tentacled ecosystem that controls more than half of the economy and acts as a powerful protection policy for the regime. It rewards loyalists with cash, careers, and other opportunities in exchange for crushing dissent and staying true to the regime, say academics and analysts who study the Iranian regime.

As expected, when faced with foreign aggression, nations unite, a phenomenon called the rallying around the flag, which occurred in Iran as well, and has galvanized the Iranian nation. Meanwhile, the region is undergoing real change. A harsh reality is taking shape as many Gulf Arab states are reflecting on it. The US did not protect them from Iranian attacks, despite the multibillion-dollar American security umbrella set up over the decades. It has been a revelation of sorts.⁴⁹⁶

The peace talks between Iran, and the US had stalled by early May, with each side blaming and threatening the other. There is a stalemate in the negotiation process. It is not clear what fresh diplomatic or military steps may be ahead. The stakes are huge for Trump. Annie Linskey, Alexander Ward, and Gavin Bade in their article "Iran War Hangs Over China Summit," Wall Street Journal, May 11, 2026. :⁴⁹⁷

As Trump prepares to meet with Xi Jinping this week, he is eager to move on from the conflict that is hurting his domestic power and the global economy. While President Trump is expected to discuss the Iran war, the focus will be on trade issues. As the heads of the world's two superpowers meet in Beijing this week, President Trump, and Chinese leader Xi Jinping will have another nation looming over their summit: Iran. The long-anticipated meeting has already been delayed once due to the U.S. and Israel's war against Iran, which has led to the closure of the Strait of Hormuz. Trump is eager to move on from the Middle East war that is sapping his domestic power and straining the global economy. There is a chance that there will be a resumption of hostilities as Trump reconsiders his options on the Iran war. With his next steps

uncertain and no clear endgame, Trump has raised the prospect of a prolonged naval blockade of Iran, for months more, aimed at further squeezing off its oil exports and forcing it to reach a denuclearization agreement. Simultaneously, he has left the door open to resume military action. The US military has prepared options for a "short and powerful" series of strikes as well as for taking over part of the strait to reopen it to shipping.

Most importantly, Iran had remained defiant. It had exerted powerful leverage against the US and its allies, triggering an unprecedented energy supply shock by choking off shipping in the Strait of Hormuz. Iran will be emboldened knowing that it will have this weapon at its disposal even after the war. Iran knows that, even in a weakened state, it can shut off the Strait at will. Just knowing it means that Iran was "stronger than it was before the war."⁴⁹⁸

As expected, Iran kept a path to nuclear weapons. Earlier, Trump had taken office and promised to avoid entanglement in foreign interventions, but he also did not achieve his main stated aim in attacking Iran on February 28: to close off its path to a nuclear weapon.

A stockpile of highly enriched uranium is believed to remain buried following US and Israeli airstrikes last June and could be recovered and further processed into bomb-grade material. Iran says it wants the US to recognize its right to enrich uranium for what it says are peaceful purposes. Trump's military aims stay in action to ensure that Iran can never have a nuclear weapon.

Another of Trump's declared war goals was to force Iran to stop supporting proxy groups such as Lebanon's Hezbollah, Yemen's Houthis, and Palestinian Hamas. That goal also stays unmet.

Meanwhile, Defense Secretary Hegseth denied the conflict had become a "quagmire," despite Trump having initially predicted it would be over in four to six weeks. Renewed peace talks are unlikely to yield a quick resolution, given the large gaps.

Though Trump had said he would accept nothing less than a long-term solution to the threat posed by Iran, he had at times shown signs of seeking an exit plan from an unpopular conflict. Given Trump's actions, European and Gulf Arab allies had expressed concern that Trump might eventually agree to a flawed deal that would allow a wounded Iran to remain a threat.⁴⁹⁹

Meanwhile, the global public opinion has turned against the war. Except for Israel and a minority of Republican supporters inside the US, the people overwhelmingly demand an end to the war. The ongoing conflict will now further engulf the region in destabilization and turmoil. The global economy will suffer further because of the oil and gas price shocks and disruptions of commerce. The conflict shall lead to more unintended consequences. Surely, the entire world will suffer as a result. Therefore, the conflict must be resolved at once. But the needed off-ramp is not available for the Trump administration. But there is a glimmer of hope as Pakistan is acting as an intermediary in the proposed negotiations between Iran and the US for ending the war. The back-channel efforts by Pakistan might just work, as the country has excellent relations with the US and Gulf allies, as well as good relations with neighboring Iran. Pakistan is on a tight rope and is balancing its position between the adversaries.

Trump's visit to China on May 14-15, during which the Iran conflict was also discussed. The U.S. paused its attacks on Iran last month but began a blockade of the country's ports. Tehran said it would not unblock the strait until the U.S. ended its blockade. Trump has threatened to attack Iran again if it does not agree to a deal.

Trump visited China on May 14-15 and said his patience with Iran was running out and that Chinese President Xi Jinping had agreed during their talks in Beijing that Tehran must reopen the Strait of Hormuz.

Trump said later he was considering whether to lift sanctions on Chinese oil companies buying Iranian oil imposed by Washington ahead of his trip to Beijing. China is the biggest buyer of Iranian oil.

However, his comments gave little sign of whether Beijing might use its influence with Tehran to end a conflict it said should never have started.

"I'm not asking for any favors because, when you ask for favors, you have to do favors in return," Trump said, when asked by a reporter on his plane home whether Xi had made any firm commitment to put pressure on the Iranians to reopen the strait.

"We've wiped out their (Iran's) armed forces, essentially. We may have to do a little cleanup work."

Xi did not comment on his discussions with Trump about Iran, although China's foreign ministry issued a blunt statement outlining Beijing's frustration with the Iran war.

"This conflict, which should never have happened, has no reason to continue," the ministry said.⁵⁰⁰

"We don't want them to have a nuclear weapon, we want the straits open," Trump said in Beijing, sitting alongside Xi.

Iranian Foreign Minister Araqchi said Tehran had received messages from the U.S. showing Washington was willing to continue talks.

"We hope that, with the advancement of negotiations, we will reach a good conclusion so that the Strait of Hormuz can be completely secured and we can expedite the normalization of traffic through the strait," he claimed.

"Not going to be much more patient. They should make a deal," Trump said on May 14, suggesting the enriched uranium only needed to be secured by the U.S. for public relations purposes.

Oil prices rose around 3% to near \$109 a barrel on concerns over a lack of progress in resolving the conflict.

After talks between Trump and Xi on May 14, the White House said Xi had made clear China's opposition to any Iranian effort to charge a toll for use of the strait.

Trump said Xi also promised not to send Iran military equipment. "That's a big statement," Trump said.⁵⁰¹

Meanwhile, a fragile ceasefire between the US and Iran holds after weeks of conflict, with negotiations still far from producing a lasting agreement. The US paused its attacks on Iran last month but began a blockade of the country's ports. Talks aimed at ending the conflict have stalled with Iran refusing to end its nuclear program or relinquish its stockpile of enriched uranium. Iran, which denies it intends to build a nuclear weapon, has refused to end its nuclear program or relinquish its hidden stockpile of enriched uranium, to Trump's frustration.

Three months after the United States and Israel staged an attack on Iran, a U.S. blockade and Tehran's grip on the Strait of Hormuz have created a deadlock, with neither side bending, economic pain deepening, and the risk of renewed war rising.

A growing concern among policymakers is not whether a deal is near, but how long tensions can persist before a miscalculation by Washington or Tehran triggers renewed conflict.

Calls for a fresh strike are growing louder in the U.S. and Israel, with some officials arguing that increased pressure could weaken Tehran's leverage and force Iran back to the negotiating table.

"There is one major problem with this theory: We have already tested it, repeatedly, and Iran did not capitulate," said Danny Citrinowicz, a senior researcher on Iran at Israel's Institute for National Security Studies and former head of the Iran branch in Israeli Defense Intelligence.

"We're in a war of attrition with the prospect of a new U.S.-Israeli attack growing by the day," said one regional official.

Iran stays defiant and claims that concessions on their missile program, nuclear capabilities, or control of the Strait are not policy tools but ideological pillars of the Islamic Republic's survival -- giving them up is not compromising, it is surrender.

That explains, Citrinowicz said, why even prolonged military confrontation has failed to shift Tehran from its red lines, and why further escalation is unlikely to succeed.

Rounds of indirect talks mediated by Pakistan have produced no breakthrough. The gaps stay vast.⁵⁰²

Both Iran and the US see time as a leverage that is stopping a compromise. The United States wants Iran to halt uranium enrichment for 20 years and ship out its stockpiles to the U.S.

Iran wants an end to the strike, security guarantees, war reparations, and recognition of its sovereignty over Hormuz -- terms Washington has rejected.

Iran's foreign ministry did not reply to a request for comment. The U.S. State Department did not at once respond to a request for comment on the issues raised in this article.

It's going to happen, and it's going to happen fast, and you're going to see oil prices plummet.

President Donald Trump has warned Tehran that the "clock is ticking," saying they "better get moving, FAST, or there won't be anything left of them." He threatened that if Tehran does not reach a deal with Washington, it will face "a very bad time."⁵⁰³

Ali Vaez of the International Crisis Group said neither side has shown willingness to make "the painful concessions" needed for a deal. "Both believe time is on their side and they have the upper hand, and that perception is precisely what is making a deal impossible."

The result is a war of endurance centered on one of the world's most critical waterways. Before the war, the Strait carried 25% of global oil trade and 20% of liquefied natural gas. Now, with the Strait nearly closed, the economic fallout is growing, disrupting supplies.

Trump kept on saying that the war would be over very soon. He said on May 19 the war would be over "very quickly," while Vance talked up progress in talks with Tehran about an agreement to end hostilities. "We're in a pretty good spot here," Vance said.

Trump made his comments a day after saying he had paused a planned resumption of hostilities following a new proposal by Tehran to end the conflict.

Iran's leaders are begging for a deal, he said, adding that a new U.S. attack would happen in the coming days if no agreement was reached.

Two Chinese ships, among a handful of supertankers carrying Iraqi crude, exiting the Gulf this month, passed through the narrow strait carrying around 4 million barrels of crude, according to data from LSEG and Kapler.

Oil prices rose on the positive signals from the White House and in the Gulf, with Brent crude falling to as low as \$110.16 a barrel, before regaining much of its losses.

Trump said on May 19 that he was 'an hour away' from ordering an Iran attack. "Next, hell of a job, and I think we're going to be finished with that very quickly, and they won't have a nuclear weapon. Hopefully, we're gonna get it done in a very nice manner." ⁵⁰⁴

Vance acknowledged difficulties in negotiating with a fractured Iranian leadership. "It's not sometimes totally clear what the negotiating position of the team is," he said, so the US is trying to make its own red lines clear. He also said one aim of Trump's policy is to prevent a nuclear arms race from spreading in the region.

Azizi, head of the Iranian parliament's national security committee, said that Trump's pausing of an attack was due to the realization that any move against Iran would mean "facing a decisive military response."

Tehran's latest peace proposal involved ending hostilities on all fronts, including Lebanon, the exit of US forces from areas close to Iran, and reparations for destruction caused by the US-Israeli attacks. Iran also sought the lifting of sanctions, release of frozen funds, and an end to the U.S. marine blockade.

The terms appeared little changed from Iran's earlier offer, which Trump rejected last week as "garbage." ⁵⁰⁵

Meanwhile, the US-Israeli bombing killed thousands of people in Iran before it was suspended in a ceasefire in early April. Israel has killed thousands more and driven hundreds of thousands from their homes in Lebanon, which it invaded in pursuit of the Iran-backed Hezbollah militia. Iranian strikes on Israel and neighboring Gulf states had killed dozens of people.

Trump and Netanyahu said they launched the war to curb Iran's support for regional militias, dismantle its nuclear program, destroy its missile capabilities, and create conditions for Iranians to topple their rulers. But the war has yet to deprive Iran of its stockpile of near-weapons-grade enriched uranium or its ability to threaten neighbors with missiles, drones, and proxy militias.

Meanwhile, Iran remained defiant of US and Israeli actions. The Iran ceasefire had mostly held, although drones had been launched towards Gulf countries by Iran's allies.

The Iranian regime, which had faced a mass uprising at the start of the year, withstood the superpower onslaught with no sign of organized opposition. Donald Trump has again threatened Iran, saying the US may launch new attacks if Tehran continues to refuse the significant concessions he wants before a deal can be struck to end the Middle East war.

On May 19, Trump said he had called off a fresh wave of strikes, which would have broken the ceasefire in place since early last month. The decision apparently followed a further peace proposal submitted by Tehran via Pakistan, which has mediated, and may have been motivated by the reluctance of allies, including Saudi Arabia, Qatar, and the United Arab Emirates, to see hostilities resume.

Trump said Iran's leaders were "begging" to make a deal, but a new US attack would deliver "a big hit" in the coming days if one was not reached.

Trump has made repeated threats in recent weeks, but the continuing failure to follow through has increased the sense that the conflict is deadlocked.

Iran continues to block most shipping in the Strait of Hormuz, which carries about a fifth of the world's supply of oil and liquid gas, before the conflict, while the US has imposed its own naval blockade on Iranian ports.

Iranian officials have still been defiant in the face of Trump's new threats, describing US demands as "excessive."⁵⁰⁶

Iran's military spokesperson reiterated on May 19 that Tehran would continue to manage the strait, adding that the US needed to "respect the Iranian nation and observe the legitimate rights of the Islamic Republic".

On May 18, Iran announced the formation of the Persian Gulf Strait Authority to manage traffic through the waterway, while the IRGC had threatened to impose permits on the internet fiber optic cables passing through the strait.

Iran said on May 19 that in the event of new attacks, it would "open new fronts" against the US, which has gathered a vast array of military firepower in the region, and said Tehran had used the ceasefire "to strengthen its combat capabilities".

Likely, Iran would also redouble efforts to retaliate against Israel and nearby Gulf states, targeting vulnerable oil and other civilian infrastructure.

Tehran's latest peace proposal involved ending hostilities on all fronts, including Lebanon, the withdrawal of US forces from areas close to Iran, and reparations for destruction caused by US-Israeli attacks. Kazem Gharibabadi, Iran's deputy foreign minister, said Tehran also wanted sanctions lifted, frozen funds released, and an end to the US marine blockade. The terms appeared little changed from their earlier offer, which Trump rejected last week as "garbage."⁵⁰⁷

Since the ceasefire began on April 8, Tehran and Washington have held only a single round of talks: an unsuccessful 21-hour session in Islamabad. Pakistani mediators have sought to bridge the big gaps between the two sides, passing successive proposals from one to the other, but have complained that both are "changing their goalposts."⁵⁰⁸

On May 20, the IRGC warned that the US-Israeli war on Iran would extend beyond the region if the US and Israel resume attacks on Iran. The warning came after Trump said Washington could strike Iran again if no deal on a lasting settlement is reached in the coming days.

The 40-day war killed top Iranian leaders, including Supreme Leader Ayatollah Ali Khamenei, triggering retaliatory missile and drone attacks by Tehran across the region.

On May 19, Trump offered a deadline of several days for resuming strikes if a deal is not agreed upon. He had said a day earlier that Gulf Arab leaders asked him to hold off on an attack at the 11th hour.

The Iranian regime again threatened the US when Foreign Minister Araghchi said that a "return to war will feature many more surprises".

Meanwhile, two Chinese tankers laden with oil exited the Strait of Hormuz, brightening hopes that the US-Israeli war on Iran may soon be resolved after positive comments from the US president and his deputy.

On May 19, Trump said the war would be over "very quickly," while Vance talked up progress in talks with Tehran about an agreement to end hostilities. "We're in a pretty good spot here," Vance told a White House press briefing.⁵⁰⁹

Trump made his comments a day after saying he had paused a planned resumption of hostilities following a new proposal by Tehran to end the conflict.

"An hour away from making the decision to go today," Trump said. Iran's leaders are begging for a deal, he claimed, adding that a new US attack would happen in the coming days if no agreement were reached.

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Oil prices eased on the positive signals from the White House and in the Gulf, with Brent crude falling to as low as \$110.16 a barrel, before regaining much of its losses.

Most importantly, investors were eager to gauge whether Washington and Tehran could find common ground and reach a peace agreement, with the US stance shifting daily.

Vance acknowledged difficulties in negotiating with a fractured Iranian leadership. "It's not sometimes totally clear what the negotiating position of the team is," he said, so the US is trying to make its own red lines clear. He also said one aim of Trump's policy is to prevent a nuclear arms race from spreading in the region.

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The US-Israeli bombing killed thousands of people in Iran before it was suspended in the ceasefire. Israel had killed thousands more and driven hundreds of thousands from their homes in Lebanon, which it invaded in pursuit of the Iran-backed Hezbollah militia. Also, Iranian strikes on Israel and neighboring Gulf states have killed dozens of people.

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Trump and Netanyahu said they launched the war to curb Iran's support for regional militias, dismantle its nuclear program, destroy its missile capabilities, and create conditions for Iranians to topple their rulers.

But the war has yet to deprive Iran of its stockpile of near-weapons-grade enriched uranium or its ability to threaten neighbors with missiles, drones, and proxy militias. Iran's leadership, which had faced a mass uprising at the start of the year, withstood the superpower onslaught with no sign of organized opposition.⁵¹¹

Meanwhile, Iran and the US had both escalated their threats while simultaneously swapping proposals to end the war. Pezeshkian praised Pakistan for preventing its territories from being used as bases for armed operations against Iran, and Pakistan's diplomatic efforts during recent tensions, particularly the role of its political and military leadership in supporting ceasefire stabilization efforts.⁵¹²

Meanwhile, the closure of the Strait of Hormuz and the threat of further conflict in the region have sent oil prices soaring, increasing inflation worldwide and threatening a global recession. A new round of fighting could send prices even higher and stock markets tumbling.

Both Iran and the US want to avoid a new round of hostilities, but neither is willing to pay the political price of the concessions necessary to secure a peace agreement. White House officials are concerned that the conflict, which has little support among US voters, may derail Republican chances of keeping control of Congress at a time when worries about the cost of living are acute.

Iran faced a deepening economic crisis and potential damage to its oil infrastructure. Inflation was soaring, and there was a fear of an increase in popular discontent with the regime. However, the Iranian regime was intact and probably more hardline than it had ever been. Unexpectedly, the US stance was shifting daily.⁵¹³

Meanwhile, quiet diplomacy through Pakistan is ongoing even when Iran and the US each rejected the other's most recent proposals. Given very recent developments, there is still a glimmer of hope that there might be a peace deal between Iran and the US-Israel through facilitation by Pakistan, backed by Turkiye, Saudi Arabia, Qatar, and China now. Pakistan's Interior Minister Naqvi, on May 20, made two trips to Tehran, in intense diplomatic efforts aimed at securing a deal to end the Iran-US war.

Naqvi's visits underscored a growing sense of urgency, as Trump had set a timeline for the negotiations to succeed or risk renewed military escalation. Moreover, the mediators were working on a "letter of intent" that both the US and Iran would sign to formally end the war and launch 30 days of negotiations on issues like Iran's nuclear program and the opening of the Strait of Hormuz. Munir had also met with Vahidi, a senior commander of Iran's IRGC and considered among the country's most powerful figures after Supreme Leader Ayatollah Khamenei.

The Iranian president said: "Iran has consistently honored its commitments and explored every avenue to avert war; all paths remain open from our side. Forcing Iran to surrender through coercion is nothing but an illusion. Mutual respect in diplomacy is far wiser, safer, and more sustainable than war."

The back-to-back visits come at a critical juncture when Pakistan is exchanging messages between Tehran and Washington to secure a permanent ceasefire and revive negotiations. Pakistan's mediation efforts have received overwhelming support from several countries, particularly from the Gulf region, which fears greater instability if the war resumes.⁵¹⁴

Meanwhile, Trump showed that he had halted planned strikes on Iran at the request of Saudi Arabia, Qatar, and the UAE. He said he had accepted the request as serious talks were taking place.

Saudi Arabia's foreign minister issued a statement backing Pakistani efforts and urging all sides to seize the opportunity.

Saudi Foreign Minister Farhan Al Saud, in a statement posted on X, welcomed President Trump's decision to "give diplomacy a chance" to reach an agreement to end the war and restore "the security and freedom of maritime navigation in the Strait of Hormuz to its state before February 28, 2026."

Saudi Arabia also highly appreciates the ongoing mediation efforts conducted by Pakistan in this regard. Saudi Arabia looks forward to Iran seizing the opportunity to avoid the dangerous implications of escalation, and urgently responding to the efforts to advance the negotiations leading up to a comprehensive agreement to achieve lasting peace in the region and the world," Prince Faisal bin Farhan added.

The reference to restoring the Strait of Hormuz to its pre-war status suggested that freedom of navigation through the vital waterway has emerged as a central issue in the ongoing diplomacy, amid fears that any prolonged disruption could severely impact global energy supplies and regional stability.

Iran, however, wants to exercise greater control over the waterway and is even considering charging tolls. Other stakeholders are not in favor of such a move and want the strait restored to its pre-war status.⁵¹⁵

Iran said on May 21 that it was reviewing Washington's latest position on ending the war after Trump suggested he was prepared to wait a few days to "get the right answers" from Tehran, but warned of renewed attacks if it did not agree to a deal.⁵¹⁶

Pakistan, which hosted peace talks in April and is acting as the conduit for messages between the two sides, continues to mediate between Tehran and Washington, he added, with several rounds of communication having taken place. Pakistan's interior minister was in Tehran on May 20.

Meanwhile, both Iran and the US continued to threaten each other. "Believe me, if we don't get the right answers, it goes very quickly. We're all ready to go," Trump said. Asked how long he

would wait, Trump said, "It could be a few days, but it could go very quickly." Trump reiterated his determination not to allow Iran to get a nuclear weapon. "We're in the final stages of Iran. We'll see what happens. Either have a deal, or we're going to do some things that are a little bit nasty, but hopefully that won't happen," Trump told reporters earlier in the day. "Ideally, I'd like to see a few people killed, as opposed to a lot. We can do it either way." Earlier, the IRGC had warned against renewed attacks. "If aggression against Iran is repeated, the promised regional war will extend beyond the region this time," it said in a statement.

Tehran was implementing a new multi-tiered system granting vessels safe passage through the waterway. Iran sent its latest offer to the US recently. Tehran's descriptions suggest it repeated terms Trump previously rejected, including demands for control of the Strait of Hormuz, compensation for war damage, lifting of sanctions, release of frozen assets, and the withdrawal of US troops.⁵¹⁷

Meanwhile, supertankers carrying 6 million barrels of Middle East crude exited the Strait of Hormuz via the Iran transit route. On May 20, Iran released a map showing a "controlled maritime zone" at the strait and said transit would require authorization from an authority set up to control the area. It said it aimed to reopen the strait to friendly countries that abide by its terms. That could potentially include fees for access, which Washington said would be unacceptable.⁵¹⁸

Meanwhile, Vance said Washington and Tehran had made "a lot of progress" in talks and that neither side wants a resumption of military action. The core US demand remained that Iran never get a nuclear weapon, with Washington seeking a long-term agreement that prevents Iran from rebuilding its nuclear weapons capacity.⁵¹⁹

On May 20, Iran's Persian Gulf Strait Authority announced a new oversight zone in the Strait of Hormuz requiring vessels transiting designated areas to coordinate with Iranian authorities. The authority said the measure covered maritime routes between Iran and the UAE at both eastern and western entrances to the strategic waterway.

Iran has developed a complex, multi-tiered mechanism that has been deployed for clearing vessels through the Strait of Hormuz. With Iran now in de facto control of the strait, the system can involve government-to-government arrangements, intense vetting by the Iranian government, and sometimes fees in exchange for safe passage.

By early May, around 1,500 vessels with about 22,500 sailors aboard were trapped in the Gulf, according to the U.S. military. That maritime bottleneck stems from Iran's ability to strike ships in the strait from along the coast. Its grip has transformed the conflict into what the head of the International Energy Agency described as the world's worst-ever energy crisis. The US Navy has responded by imposing its own blockade of Iranian ships and cargo with a cordon outside the strait. Only a trickle of vessels passed through the waterway. Between April 18 and May 6, fewer than 60 ships made it through, according to unpublished analysis by U.S. firm SynMax Intelligence. Before the war, some 120 to 140 ships traversed the strait on a typical day, about half of them oil tankers. American citizens are prohibited from engaging in transactions with the Iranian government under US sanctions laws. Non-Americans may also face "secondary

sanctions” for dealing with Iranian entities. In addition, many Western governments keep their own sanctions and restrictions relating to Iran.

The US Treasury Department said on May 1, warning “about the sanctions risks of making these payments to, or soliciting guarantees from, the Iranian regime for safe passage.” The new Iranian mechanism includes a tiered system giving preference to ships linked to its allies Russia and China, followed by countries such as India and Pakistan with close ties to Tehran, and then government-to-government agreements. Under international maritime law, governments cannot charge for safe passage through a strait. But there can be fees associated with security or services if ships of all countries are treated equally. These payments and the names of ship owners who have paid Iranian authorities to extract their vessels are closely guarded secrets, as such payments would violate US economic sanctions on Iran’s government. In addition to charges, violators would also lose their insurance coverage for making payments that could help the IRGC, because it is an internationally designated terrorist organization, according to two maritime insurance experts.⁵²⁰

But ship owners’ willingness to deal directly with Iran despite the risks shows the degree to which the strait is under Iranian control. The Straits would be blocked or opened only by the approval of Iran. Some will get through because of political alliances, others will have to pay, and others will be turned back. This was the new norm.

Meanwhile, in a response to the recent findings about Iran’s new control mechanism, China’s Ministry of Foreign Affairs called for Hormuz to be opened and said it was concerned about “future arrangements for the strait.” “Such arrangements should comply with international law and practice, and take into account the legitimate security concerns of coastal states and the legitimate demands of regional countries and the international community,” the ministry’s statement said.⁵²¹

Outside of government agreements, the process to secure Iranian permission to transit involves a detailed vetting procedure conducted by the IRGC, which reviews a so-called affiliation document supplied by a ship owner or operator and sent through an intermediary. The affiliation check is to show if the vessel has any connection to the U.S. or Israel. It takes about a week for the IRGC to review documentation, and during the process, they may want to physically inspect the ship.

The IRGC required ship owners to show details including the value of the ship’s cargo, the flag, its origin and destination, the registered owner and manager, and the nationalities of the crew. The vetting is carried out by Iranian state institutions, including the Ports and Maritime Organization, the Ministry of Industry, Mine and Trade, the national shipping organization, and the security overseer of the Supreme National Security Council, according to the three senior Iranian officials. The IRGC, which had broad oversight over Iranian security, is also involved in evaluating the ships.

Bilateral arrangements for passage include an added step: Countries contact Iran’s foreign minister to request permission. The minister forwards these to the Supreme National Security Council, which includes the IRGC and representatives of Supreme Leader Mojtaba Khamenei. A

decision is then made and communicated to the relevant bodies, including the IRGC, which provides the coordinates and instructions needed for safe passage. Once everything is verified, the ship captain is given a route to follow, and the ship sails out of the area with guidance from the Iran navy. The captains are strictly told to follow the given route. Ships are told to turn off their location transponders and not use satellite communications.⁵²²

Meanwhile, Vietnam pressured the United States to let the ship pass. There was no reason for it to be stopped to begin with because, he added, the “vessel and cargo had no Iranian involvement.” Vessels from India, Russia, Pakistan, and Vietnam have crossed the Strait of Hormuz. For many vessels, the route out of the Gulf and through the Strait of Hormuz involves clearing multiple Iranian waypoints, often staffed by armed personnel, according to two shipping industry sources and three Iranians. But even for vessels that made it through the Strait of Hormuz, the ordeal wasn’t necessarily over. They faced the US blockade, which was enforced by Centcom, which was put in place on April 13. Earlier, the US stopped the *Agio Fanourios* and was finally released on May 16 without explanation. It is now bound for Vietnam, loaded with 2 million barrels of crude.⁵²³

The US and Iran continued to threaten each other, as before. Given the history of the Iran-US and Israel-US relations, mutual distrust between the US and Iran also continued, as before.

White House Deputy Chief of Staff Miller issued a warning to the Iranian leadership about the ongoing standoff as negotiations have failed to progress. He said that the current administration in Tehran faces a critical ultimatum from the US. “This new team in Iran has a choice to make,” Miller said. They can either agree to a piece of paper that is satisfactory to the US, or they can face a punishment from our military, the likes of which has not been seen in modern history. That’s the choice that they face,” he said.⁵²⁴

Iran said on May 20 that the IRGC had been closed and claimed that Washington had failed to reverse the situation.⁵²⁵

The Iranian military claimed that it had developed advanced weapons that had not yet been used in war. Iran faced no shortage of military or defensive capabilities and warned that it would not show restraint in any future confrontation.⁵²⁶

Matt Spetalnick, “Three months in, is Trump losing the Iran war?” published in Reuters, May 23, 2026, has argued well that:⁵²⁷

Trump may have won about every battle against Iran, but three months after attacking the Islamic Republic, he now faces a bigger question: Is he losing the war? With Iran’s grip on the Strait of Hormuz, its resistance to nuclear concessions, and its theocratic government intact, doubts are growing that Trump can translate the U.S. military’s tactical successes into an outcome he can frame convincingly as a geopolitical win. His repeated claims of complete victory ring hollow, some analysts say, as the two sides teeter between uncertain diplomacy and his on-again-off-again threats to resume strikes, which would be sure to draw Iranian retaliation across the region. Trump is now at risk of seeing the U.S. and its Gulf Arab allies emerge from the conflict worse off, while Iran, though battered militarily and economically, could end up with greater leverage, having shown it can throttle one-fifth of the world’s oil and

gas supplies. The crisis is not yet over, and some experts leave open the possibility that Trump might still find a face-saving way out if negotiations break in his favor. But others predict a grim post-war outlook for Trump. "We're three months in, and it's looking like a war that was designed to be a short-term romp for Trump is turning into a long-term strategic failure," said Aaron David Miller, a former Middle East negotiator for Republican and Democratic administrations. For Trump, that matters, especially given his famous sensitivity to being perceived as a loser, an insult he has often lobbed at opponents. In the Iran crisis, he finds himself commander-in-chief of the world's mightiest military, pitted against a second-tier power convinced it has the upper hand. And this predicament could make Trump, who has yet to define a clear endgame, more likely to resist any compromise that looks like a retreat from his maximalist positions or a repetition of the 2015 Obama-era nuclear deal with Iran that he scrapped in his first term, analysts say.

Meanwhile, White House spokesperson Wales made an outlandish statement that the US had met or surpassed all its military goals. "President Trump holds all the cards and wisely keeps all options on the table," she said.

Trump campaigned for a second term, promising no unnecessary military interventions, but has brought the U.S. into an entanglement that could do lasting damage to his foreign policy record and credibility abroad.

The continuing standoff comes as he faces domestic pressure over high U.S. gasoline prices and low approval ratings after he embarked on the unpopular war ahead of November's midterm elections. His Republican Party is struggling to keep control of Congress.

As a result, more than six weeks into a ceasefire, Trump faced a stark choice: to accept a potentially flawed deal as an off-ramp or escalate militarily and risk an even longer crisis. Among his options, if diplomacy collapses, would be to launch a round of sharp but limited strikes, frame it as a final victory, and move on.⁵²⁸

Pakistan has aimed to narrow differences between Iran and the U.S. after weeks of war have left the vital Hormuz waterway closed to most shipping despite a fragile ceasefire.

"The trend this week has been towards a reduction in disputes, but there are still issues that need to be discussed through mediators. We will have to wait and see where the situation ends in the next three or four days," said Iranian Foreign Ministry spokesperson Baghaei.⁵²⁹

Iran has demanded supervision of the strait, an end to the U.S. blockade on its ports, and the lifting of sanctions on Iranian oil sales.

Baghaei said the issue of the US blockade on Iran's shipping was important, but that its priority was ending the threat of new US attacks and the ongoing conflict in Lebanon, where Iran-allied Hezbollah militants are fighting Israeli troops who have moved into the south.

Qalibaf said Iran's armed forces had rebuilt their capabilities during the ceasefire and that, if the U.S. "foolishly restarts the war," the consequences would be "more forceful and bitter" than at the start of the conflict.

Despite weeks of conflict, Iran has preserved its stockpile of near-weapons-grade enriched uranium as well as missile, drone, and proxy capabilities.⁵³⁰

On May 23, Qalibaf said that the U.S. was not an honest party in negotiations to end the war and Iran would not compromise on its national rights. A regional mediation push led by Pakistan aims to narrow differences between Iran and the U.S. after weeks of war that have left the vital waterway of the Strait of Hormuz closed to most shipping despite a fragile ceasefire, upending global energy markets.

Pakistan strongman Munir was on a visit to Tehran and had talks with Pezeshkian in the presence of Araqchi. The talks centered on a 14-point document proposed by Iran, which it considers the main framework for the discussions, and messages exchanged between the two sides.

Qalibaf said Iran would pursue its "legitimate rights", both on the battlefield and through diplomacy, but added that it could not trust "a party that has no honesty at all", an allegation Iran has made several times before.

He said Iran's armed forces had rebuilt their capabilities during the ceasefire and that, if the United States "foolishly restarts the war", the consequences would be "more forceful and bitter" than at the start of the conflict.⁵³¹

Earlier, Secretary of State Rubio said on May 22 that the US had seen some progress towards a deal but that more work was needed, while Iran said the differences remained deep and significant. Despite weeks of conflict, Iran has preserved its stockpile of near-weapons-grade enriched uranium as well as missile, drone, and proxy capabilities that the United States and Israel say they aim to curb.⁵³²

On May 23, Trump said an agreement with Iran has been "largely negotiated," and details will be announced soon. The deal would include the reopening of the Strait of Hormuz, he said.

Trump said he had a "very good call" with the leaders of Saudi Arabia, the United Arab Emirates, Qatar, and others about a "Memorandum of Understanding about PEACE".

"An agreement has been largely negotiated, subject to finalization between the United States of America, the Islamic Republic of Iran, and the various other Countries, as listed," Trump said. Final aspects and details of the deal are currently being discussed and will be announced shortly."

He also said he had a call on May 23 with Netanyahu, which "went very well".

The president did not give any further details on the deal, but had insisted any agreement would "absolutely" prevent Iran from obtaining a nuclear weapon.⁵³³

Iranian foreign ministry spokesperson Baqaei said that US and Iranian positions had been converging in the last week, but warned that this did not mean agreements would be reached on key issues and accused the Americans of "contradictory statements".⁵³⁴

Pakistan, the US, and Iran said on May 23 that progress had been made in talks on ending almost three months of war. Iran said it was focused on completing a memorandum of understanding, or MOU, after its top officials met Pakistan strongman Munir.

On May 23, Trump said "50/50" on whether to agree to a deal with Iran or resume strikes, adding that he says he will decide by May 24. Trump said he would only accept a deal that covers issues like uranium enrichment and the fate of Iran's existing stockpiles, but it notes that those issues are unlikely to be resolved in any detail in what it says is the MoU being discussed, which would end the war and trigger more detailed negotiations. Trump said, "I think one of two things will happen: either I hit them harder than they have ever been hit, or we are going to sign a deal that is good." He further said, "Some people would much rather have a deal, and others would rather resume the war," he said. He rejected assertions that Netanyahu is "worried" about a potential deal, but said the prime minister is "torn."⁵³⁵

Trump, on May 23, said that Washington and Tehran were "getting a lot closer" to an agreement to end the war between the two countries. Without providing details about the agreement, Trump said: "Every day it gets better and better."

He said that the final agreement will prevent Iran from obtaining a nuclear weapon, adding that he "wouldn't even be talking about it" otherwise, noting that the deal would also result in Iran's enriched uranium being "satisfactorily handled." "Will only sign a deal where we get everything we want," he said. Trump is still mulling proposals and has not made up his mind yet, adding that he is consulting with advisers and talking to foreign leaders, including leaders from Saudi Arabia and other Gulf countries.⁵³⁶

Iran and Pakistan had given a revised proposal to the US to end the war and reopen the Strait of Hormuz. A US response to the proposal is expected by May 24. The deal is "fairly comprehensive." The MoU is being "fine-tuned" with "significant progress" made toward ending the war. The reported draft agreement does not explicitly mention key US demands, including the dismantling of Iran's nuclear program and export of its stockpile of 60%-enriched uranium, limiting its ballistic missiles, and ending its support for terrorist proxies. It provides for negotiations on the unspecified "outstanding issues" to begin within seven days of the agreement taking effect. Although it conditions US sanctions relief on Iran's commitment to the

terms of the agreement, it does not appear to specify the consequences if the outstanding issues are not resolved.⁵³⁷

Later, Pakistan's Prime Minister Sharif said: "I congratulate President Donald Trump on his extraordinary efforts to pursue peace," and said the phone call had been "very useful and productive".

Pakistan has been helping to negotiate a peace deal, serving as an intermediary. "We hope to host the next round of talks very soon," he wrote in the statement on X.

The US and Israel launched wide-ranging strikes on Iran on 28 February, sparking conflict across the Middle East. Iran responded by launching attacks on Israel and US-allied states in the Gulf.

A ceasefire in Iran was agreed in early April, and since then, Washington and Tehran have engaged in talks over a long-term peace deal.

On May 23, Iranian foreign ministry spokesperson Baqaei also described a "memorandum of understanding", saying Iran intended to reach an agreement "in the form of a framework, consisting of 14 points".

Baqaei said they were completing the memorandum, so further talks could be held within 30 to 60 days, "and ultimately a final agreement can be reached".⁵³⁸

The new sense of momentum comes after the mood appeared to have soured in Washington, with media reports on May 22 that the administration was preparing for a fresh round of military strikes, although no final decision had been made.

Last week, Trump had said the truce was on "massive life support" after rejecting Tehran's demands, labelling them "totally unacceptable".

The US had blockaded Iranian ports since April 13.

On May 23, Centcom claimed it had redirected 100 vessels, disabled four, and allowed 26 humanitarian aid ships to pass since the blockade began. Centcom commander Admiral Brad Cooper said its forces had been "highly effective" in "allowing zero trade into and out of Iranian ports, which has squeezed Iran economically".

Meanwhile, Iran has claimed military control of an area around the Strait of Hormuz, and has said all transit through the strait "requires coordination with and authorization from the Persian Gulf Strait Authority".

The US and Gulf allies have repeatedly rejected Iranian attempts to assert control over the strait, and the US has told ships not to follow Iran's rules.⁵³⁹

Gaps remained between the parties, and the dispute over Iran's nuclear program would not be part of the first talks. Tehran said it was completing a 14-point framework for a deal.

Iranian foreign ministry spokesperson Baqaei noted what he called "a trend towards rapprochement," but said, "it does not necessarily mean that the United States and we will reach an agreement on the important issues".

"Our intention was first to draft a memorandum of understanding, a kind of framework agreement composed of 14 clauses," he said.⁵⁴⁰

Baqaei added that he hoped the details of the final agreement could be worked out "within a reasonable timeframe between 30 to 60 days" after the framework is finished.

Iran's chief negotiator Ghalibaf had warned earlier that Washington would face a tough response if it resumed hostilities, after US media reports raised the prospect of new strikes and Iranian officials accused the US side of making "excessive demands."

"Our armed forces have rebuilt themselves during the ceasefire period in such a way that if Trump commits another act of folly and restarts the war, it will certainly be more crushing and bitter for the United States than on the first day of the war," Ghalibaf said.

Weeks of negotiations, including historic face-to-face talks hosted by Islamabad, had still not produced a permanent resolution or restored full access to the Strait of Hormuz, choking vast quantities of global oil supply. The impasse had left ordinary Iranians in limbo.

Iran's Foreign Minister Araghchi said in a call with UN Secretary-General Antonio Guterres that Tehran was engaged despite "repeated betrayals of diplomacy and military aggression against Iran, along with contradictory positions and repeated excessive demands" by Washington.⁵⁴¹

Araghchi held a bevy of diplomatic calls, speaking with counterparts from Turkey, Iraq, Qatar, and Oman.

Qatari Emir Al Thani also spoke with Trump on May 23, as well as with the UAE president and Saudi Arabia's Crown Prince MBS. The Qatari amir and the Saudi prince discussed efforts "aimed at calming the situation and promoting political solutions."

A clear breakthrough on the Memorandum of Understanding (MoU) was reached during the visit of Field Marshal Munir to Tehran, where he held a series of high-level engagements with the Iranian leadership. His visit was widely seen as the final push to seek a diplomatic solution to the Iran-US war. Since Pakistan began mediating between Tehran and Washington, Islamabad, on May 23, issued its most positive statement yet signaling meaningful progress in the talks.⁵⁴²

The media also reported signs of progress in the talks. The deal being negotiated was "fairly comprehensive to terminate the war."

Iran further fueled speculation about an imminent breakthrough when the spokesperson for the Iranian Foreign Ministry said Tehran was in the "finalization stage" of the memorandum of understanding.

"We are in the finalization stage of this memorandum of understanding," the spokesperson said. The issues that are being discussed at this stage are focused on ending the war. The issue of ending the US naval aggression - what they themselves refer to as the naval blockade - and issues related to the release of blocked Iranian assets are among the main issues addressed in this memorandum of understanding," the spokesperson added.⁵⁴³

A draft proposal had been approved by top negotiators, including Vice President JD Vance, special envoy Steve Witkoff, and Jared Kushner, and sent to leaders for final sign-off. Trump's post appeared to confirm that the process was now in its final hours.

Talks hinge on a 14-point document proposed by Iran, which has served as the main framework for discussions and messages between the two sides.

Among other provisions, the framework would involve Iran committing to a moratorium on nuclear enrichment, the United States agreeing to lift sanctions and release billions in frozen Iranian funds, and both sides gradually lifting restrictions on transit through the Strait of Hormuz, a waterway through which roughly 20 per cent of the world's oil ordinarily flows.⁵⁴⁴

A serious dispute between the US and Iran was about the control of the Strait of Hormuz. Tehran claimed that it had the legal right to manage the Strait of Hormuz, though it was not clear if that meant continuing to decide which ships can go through. The IRGC said 33 vessels had passed through the strait over the past 24 hours after getting permission from Tehran, still far short of the 140 on a typical day before the war.⁵⁴⁵

On May 25, two liquefied natural gas tankers are exiting the Strait of Hormuz, heading to Pakistan and China, while a supertanker with Iraqi crude for China left the Gulf on May 24 after being stranded for three months.⁵⁴⁶

The vessels were among a handful of supertankers exiting the Gulf this month via a transit route that Iran has ordered ships to use. Last week, three Very Large Crude Carriers (VLCCs) made their way to China and South Korea with 6 million barrels of crude.

Before the war began, shipping traffic through the strait averaged 125 to 140 daily passages. Some 20,000 seafarers remain stranded inside the Gulf on board hundreds of ships.⁵⁴⁷ Any deal reinforcing the current fragile ceasefire would bring relief to markets but not immediately quell a global energy crisis, which has driven up the costs of fuel, fertilizer, and food. Even if the war ends now, full flow through the strait will not return before the first or second quarter of 2027.

A tenuous ceasefire has been in place since early April. The U.S.-Israeli bombing of Iran killed thousands of people in Iran before it was suspended in early April. Israel has also killed thousands more and driven hundreds of thousands from their homes in Lebanon, which it invaded in pursuit of Hezbollah. Iranian strikes on Israel and neighboring Gulf states have killed dozens.⁵⁴⁹

Meanwhile, indirect negotiations continued between the US and Iran through Pakistan and Qatar intermediaries. By May 25, expectations had risen that a breakthrough might be imminent in the three-month-old war after Trump said an emerging agreement being brokered by Pakistan would reopen the Strait of Hormuz.⁵⁵⁰

There were now obvious signs of an agreement between the US and Iran. Vance, Witkoff, and Kushner had been involved in the talks, while the US was looking to include all regional allies in the process. Several Arab and Muslim leaders, including officials from Saudi Arabia, Qatar, Egypt, Turkey, Pakistan, and the UAE, have backed the diplomatic effort.

Pakistan had played a central mediation role, with Field Marshal Musharraf travelling to Tehran to help complete the deal.⁵⁵¹

Earlier, on May 24, Trump and a group of Arab and Islamic leaders discussed regional developments in a joint telephone call. The leaders reviewed the latest regional developments and expressed appreciation for Trump's leadership and his commitment to consultation. The participants also acknowledged the mediation efforts led by Pakistan and Qatar.⁵⁵²

On May 25, the US and Iran were close to signing a 60-day ceasefire extension that would reopen the Strait of Hormuz, allowing Iran to resume oil sales and creating a window for negotiations on Tehran's nuclear program.

The agreement had not yet been signed and remained subject to final approval by Trump and Iran's Supreme Leader Khamenei, a process that could take several days.⁵⁵³

On May 25, Prime Minister Sharif said that Pakistan hopes to host the next round of US-Iran talks "very soon," as diplomatic efforts push toward an agreement. He pledged that Pakistan would continue its peace efforts "with utmost sincerity".⁵⁵⁴

Meanwhile, Foreign Minister Dar said a telephone call led by Trump with the Muslim leaders marked "a significant step closer toward the shared objective of regional peace, stability, and an early diplomatic outcome." Dar expressed appreciation for the "constructive engagement of the Iranian leadership" in advancing the peace process. He also acknowledged regional partners, including Saudi Arabia, Türkiye, Egypt, and Qatar, saying their support had "contributed meaningfully to this outcome."⁵⁵⁵

On May 25, Trump said that Washington and Iran had "largely negotiated" a Memorandum of Understanding (MoU) on a peace deal that would reopen the Strait of Hormuz, which has been effectively closed since the US and Israel launched their war on Iran in February.⁵⁵⁶

Under the draft MoU, Iran would clear mines from the Strait of Hormuz and allow ships to pass without tolls. In exchange, Washington would lift its blockade on Iranian ports and issue limited sanctions waivers allowing Tehran to sell oil freely for 60 days. US economic relief would follow concrete Iranian steps rather than be granted upfront.

The draft also included Iranian commitments not to pursue nuclear weapons and to negotiate suspending uranium enrichment and removing its stockpile of highly enriched uranium.

Any broader sanctions relief or unfreezing of Iranian funds would be discussed during the ceasefire period, but would only be implemented as part of a final, verified agreement. Further, US forces deployed to the region would remain in place during the 60 days and would withdraw only if a final deal is reached.⁵⁵⁷

The agreement also appears linked to efforts to end the war between Israel and Hezbollah in Lebanon.

Israeli Prime Minister Netanyahu raised concerns about that condition in a call on May 24 with Trump. Netanyahu told Trump Israel would still be allowed to act if Hezbollah tried to rearm or resume attacks in Lebanon. Trump reiterated and supported this principle.⁵⁵⁸

EC President Løyen, on May 25, welcomed progress toward an agreement between the US and Iran, stressing the need for a deal that would reduce tensions and prevent further escalation in the region.

She reiterated that Iran "must not be allowed to develop a nuclear weapon" and called on Tehran to end actions she described as "destabilizing in the region, directly or through proxies, as well as its unjustified and repeated attacks on its neighbors." "Europe will continue collaborating with international partners to seize this moment for a lasting diplomatic solution. And to have the spillover of this conflict, notably on supply chains and energy prices," Løyen wrote.⁵⁵⁹

UK Prime Minister Starmer, on May 25, welcomed progress toward a potential agreement between the US and Iran, stressing the need for international efforts to secure a lasting diplomatic solution. He reiterated the UK's position that Iran "must never be allowed to develop a nuclear weapon" and said his government would continue efforts to protect British citizens from the impact of the conflict.⁵⁶⁰

The US and Iran agreed in principle to a deal that would reopen the Strait of Hormuz, in exchange for Tehran's commitment to dispose of its highly enriched uranium.

The method for disposing of Iran's highly enriched uranium was still being negotiated.

The proposed deal does not address Iran's missile stockpile nor include a moratorium on uranium enrichment. These issues were expected to be managed in future rounds of talks.

The US could consider "significant accommodations" on sanctions relief if Iran agreed to make similar concessions about its enriched uranium stockpile.

The US plan is to deal with all its stockpile of enriched material. The Trump administration sees Iran making “serious accommodations” not previously seen in earlier negotiations.⁵⁶¹

The US rejected the idea of any “tolling” mechanism for the Strait of Hormuz; such an arrangement would not be acceptable and had not been proposed by either side.

The Trump administration viewed the emerging agreement as stronger than the 2015 nuclear deal reached under former US President Barack Obama, which allowed uranium enrichment up to certain levels.

As part of the agreement, the US would lift its blockade on vessels entering and leaving Iranian ports. The Cento and Gulf partners would coordinate to ensure safe passage; this should not be viewed as a toll system.

Trump said on May 25 that a blockade on Iran would remain in “full force and effect” until a formal agreement on the nuclear issue is reached, certified, and signed. Trump said that negotiations with Iran were going ahead in an “orderly and constructive” manner, adding that he had instructed his representatives “not to rush into a deal,” arguing that time was on their side.⁵⁶²

He stressed that both sides must take adequate time to ensure the agreement is correctly completed, warning that “there can be no mistakes” in the process.

Reiterating his administration’s position, Trump said Iran must not be allowed to develop or buy a nuclear weapon, while also suggesting that relations between Washington and Tehran were becoming more “professional and productive.”⁵⁶³

Iranian President Pezeshkian said on May 25 that Iran is ready to reassure the international community that it is not pursuing nuclear weapons or instability in the region.

“Before the martyrdom of Ayatollah (Ali) Khamenei, Iran’s late Leader, we declared --, and we reiterate now -- that we are ready to assure the world we do not seek nuclear weapons,” Pezeshkian said.

“It is rather Tel Aviv that is driving regional instability,” he said, accusing Israel of pursuing a vision of “Greater Israel.” Iranian negotiators will never compromise on the country’s “honor and dignity,” added Pezeshkian.⁵⁶⁴

His remarks came a day after US President Donald Trump on Saturday said an agreement with Iran to end the war was “largely negotiated” and awaited finalization.

Earlier, Pezeshkian said that no decision will be made without the permission of Iran’s Supreme Leader, Mojtaba Khamenei, referring to the potential US-Iran deal.

“Any statement, analysis, or position that leads to division in society is, in effect, pouring water on the enemy’s damage,” he said. No decision in the country will be made outside the

framework of the Supreme National Security Council and without the permission of the Supreme Leader. The administration of the country requires a single decision and collective obedience," he added.⁵⁶⁵

Iran criticized the US on May 25, and said that US obstruction has prevented the finalization of a differences-settlement framework, warning that if it continues, "there will be no possibility of finalizing the memorandum of understanding."

Iran said that it stays firm on securing its people's rights and has conveyed this position directly to the Pakistani mediator.⁵⁶⁶

The draft stipulates that the US and its allies will not attack Iran or its allies, and in return, Iran pledges not to launch preemptive attacks on them.

President Trump made it clear that he will stand firm in negotiations on his consistent demand for the dismantling of the Iranian nuclear program and the removal of all enriched uranium from its territory, and that he will not sign a final agreement without these conditions being met.⁵⁶⁷

Iran reported that a potential MoU between Iran and the US includes an end to the war on all fronts.

This includes Israel's attacks in Lebanon, and Washington would also commit to waiving sanctions on Iran's oil during negotiations.

If the agreement is reached, the Strait of Hormuz will not fully return to its pre-war status; instead, the number of ships allowed to pass would be restored to pre-war levels within 30 days.

Iran, the news agency said, emphasizes the enforcement of its sovereign rights over the Strait of Hormuz through various means, the details of which will be announced later.⁵⁶⁸

Meanwhile, Iran insists on at least a partial release of its frozen assets, and a potential deal would also include a 60-day negotiation window on Iran's nuclear program.

Tehran also calls for the lifting of the US blockade of its ports, arguing that no changes will be made in the strait if the blockade stays in place.

Any changes to navigation and transit through the strategic waterway will also depend on the implementation of the US's other commitments in the MoU.⁵⁶⁹

Rubio said on May 25 that progress has been made on an "outline" to open the Strait of Hormuz "without toll," but that would need "full Iranian acceptance and then compliance."

"Some progress has been made, significant progress, although no final progress has been made," Rubio said.

On the Strait of Hormuz, Rubio said: "This is an international waterway. They don't own it. It's an international waterway."

Emphasizing a diplomatic solution, Rubio said the US had "made some progress over the last 48 hours collaborating with our partners in the Gulf region on an outline."

The outline, he added, "that could ultimately, if it succeeds, leave us not just with a completely open straits -- and I mean open straits without tolls -- and with addressing some of the key things that underpin what has been Iran's nuclear weapons ambitions in the past."

"Obviously," Rubio stressed, "that will require full Iranian acceptance and then compliance, and it will require some future " the details."⁵⁷⁰

US President Donald Trump held a phone call with regional leaders on May 24 to discuss ongoing indirect talks with Iran. According to him, an agreement was "largely negotiated" and awaited finalization.

"The ultimate goal is that Iran can never have a nuclear weapon. Iran can never have a nuclear weapon," Rubio said.

He said the Iranian nuclear program was a "highly technical" matter, one that would probably need to be addressed over some period of time."

The "preference" of the US is to address this through diplomatic means, and that's what we're trying to do here. I think we've made some progress. I'm always cautious when I say that because you can agree to things on paper," he said.

"But I do think perhaps there is the possibility that over the next few hours the world will get some good news, at least with regards to the straits," Rubio said. "Significant progress, although not final progress, has been made."⁵⁷¹

Iran, on May 25, accused Rubio of "attempting" to "distort realities," rejecting his remarks on global energy markets and Tehran's nuclear program.

"Such allegations constitute a clear attempt to distort the realities of the region and to deflect attention from the destabilizing policies of the United States and the Zionist regime," Iran said.⁵⁷²

Rubio on May 24 said the US would not let Iran hold the energy market "hostage," and that Tehran can never have a nuclear weapon.

Iran said that:⁵⁷³

What has held the global energy market hostage over recent years has been the unlawful and unjust sanctions imposed by the United States on Iran's oil exports; sanctions that have been designed and enforced in violation of the principles of international law and the charter of the United Nations, to exert economic pressure on the Iranian nation....These two regimes (the US and Israel) are the principal drivers behind the escalation of global security and energy crises and seek to advance their political and military objectives through the creation of instability and insecurity.

About Rubio's remarks on Iran's nuclear program, Tehran recalled that:⁵⁷⁴

As a committed member of the Treaty on the Non-Proliferation of Nuclear Weapons, it has consistently declared that its nuclear program is entirely peaceful and stays under the supervision of the International Atomic Energy Agency (IAEA). The Islamic Republic of Iran considers the peaceful use of nuclear science and technology to be the legitimate and inalienable right of its people and emphasizes that it will never relinquish this lawful and internationally recognized right.

Iran shoots down Israeli spy drone in country's south: report.

Iranian air defenses have shot down an Israeli surveillance drone over the country's southern Hormozgan province, Iran's semi-official news agency *Mehr* reported on Sunday.

The wreckage of a destroyed Orbiter drone was found in coordination with Iranian naval forces, the outlet added.

Israel has yet to comment on the report.

Iran, in disagreement with the US, said on May 25 that Tehran has not agreed to hand over its highly enriched uranium stockpile. Iran's nuclear issue was not part of the preliminary agreement with the US.⁵⁷⁵

Various media in the US and Iran said the MoU could yield an agreement that lays out a phased framework for ending months of fighting, reopening the waterway soon, and lifting a US blockade on Iran.

Plans for Iran's stockpile of enriched uranium, which Washington has insisted it give up, would be negotiated within 30 to 60 days, the reports said. crisis since the US and Israel launched the war on Iran in February. He did not say what else would be included in the agreement.

Trump posted on social media that the emerging agreement would reopen the strait, the vital shipping passage whose closure has upended global energy markets since the US and Israel launched the war on Iran in February.⁵⁷⁶

He did not say what else would be included in the agreement. "Final aspects and details of the Deal are currently being discussed, and will be announced shortly," Trump wrote on Truth Social.

However, Iran said on May 26 that the agreement would allow Iran to manage the strait and that Trump's assertion on the strait was "inconsistent with reality."⁵⁷⁷

Trump, whose approval ratings have been hit by the war's impact on U.S. energy prices and who has faced congressional efforts to curb his war powers, has repeatedly played up the prospect of an agreement to end the conflict.

As details of the possible agreement emerged over the weekend, critics, including former Secretary of State Pompeo and Democratic lawmakers, argued that it offered little beyond the

2015 Iran nuclear deal negotiated by former President Barack Obama, from which Trump withdrew during his first term.⁵⁷⁸

Hollen, a Democratic member of the Senate Foreign Relations Committee, said the deal's reported outlines would amount to little more than "the pre-war status quo" with Iran.

"I think this was a blunder," Van Hollen said on May 25. "When you're digging a hole, you should stop digging, and that sounds like maybe what we're doing finally."

Trump, who has also faced criticism from hawkish conservatives over his willingness to compromise with Iran, pushed back.

"If I make a deal with Iran, it will be a good and proper one ... So don't listen to the losers, who are critical about something they know nothing about," Trump said on May 24.⁵⁷⁹

On May 25, Mohammad Ghalibaf, the speaker of Iran's Parliament, led his country's delegation to Doha. The delegation also included Araghchi, Iran's foreign minister. They were in the city for further talks on an emerging peace agreement with the US, as Trump issued conflicting signals over how much progress had been made in the negotiations. Nearly every vital aspect of a potential peace deal remains unclear, including the fate of Iran's nuclear program and missile stockpile, whether the agreement would cover the war between Israel and Hezbollah in Lebanon, and whether Iran would continue to assert control over the Strait of Hormuz. As fighting between Israel and the Iran-backed Hezbollah continued in Lebanon on May 26, it was unclear how any US-Iran deal would address the fundamental issues at play in the war there.⁵⁸⁰

Nor was the timing certain. Trump vowed on May 25 that either the deal would be "great and meaningful" or "there will be no deal," after saying that his negotiators were in no rush to close the agreement.

Trump, on May 25, said that he asked Saudi Arabia, Qatar, Pakistan, Turkey, Egypt, and Jordan to join his first-term legacy deal, known as the Abraham Accords, to normalize ties with Israel as part of the first agreement. Trump said about his new proposal, "Wow, now that would be something special!" "This will be the most important Deal that any of these Great but always in Conflict Countries will ever sign." Given his track record in running or managing this war, it is not entirely clear what Trump himself has to show for it that he feels able to impose such a demand on regional countries.⁵⁸¹ Stephen Collinson, in his brilliant article "A ruse, a brave gamble or a fantasy? Why Trump's most puzzling Iran move yet is unlikely to work," published in CNN on May 26, has argued that:⁵⁸²

If Donald Trump's search for a way out of the Iran war was not difficult enough, he's added a new goal that threatens to vastly complicate the Middle East's already splintered politics....The suggestion created yet another storm of confusion as US and Iranian negotiators haggled over language on a proposed memorandum of understanding that might provide an eventual framework for talks. But it's hard to believe that political conditions in these states, further inflamed by Israel's role in the Iran war, will allow even strong Arab and Muslim state leaders to offer concessions to Israel that Trump wants. And Trump's statement that even Iran might join

the accords in the event of a peace deal seems a fantasy to match his previous vision of a “Riviera of the Middle East” built on the ruins of Gaza....It’s unthinkable that the Islamic Republic would recognize its sworn enemy, Israel, any time soon, let alone considering its raids killed Supreme Leader Ali Khamenei. And there’s no chance Israel would contemplate such a step with an enemy it regards as an existential threat to the Jewish people. Plus, there must be questions about Trump’s capacity to persuade allies to fall into line after starting a war that has shattered regional stability and caused deep damage. So, what to make of Trump’s new gambit, which followed weekend virtual talks with Arab and Muslim leaders about his Iran peace effort? One explanation is that, despite the disappointment of an inconclusive war that has battered his approval ratings at home, he’s not given up his grand visions for a Middle East transformation. A period of reconciliation and a broadening of economic, political, and cultural links is vital to any hopes of draining the historic poison that makes each war a precursor to the next. But it’s also clear this is hardly the moment. Any genuine belief otherwise on Trump’s part would provoke serious doubts about his grip on current realities in the region. And this would not be new: It has been a consistent problem that led him to underestimate Iran as a military adversary and to assume its regime would quickly fall. But Tehran stays unbowed. The commander of Iran’s Islamic Revolutionary Guard Corps (IRGC) of Greater Tehran, for instance, now claims his country is stronger now than it was on the first day of the war, according to the semi-official Fars News Agency. There could be some political art at work. One possibility is that Trump may have hoped to offer incentives to Israelis — in the form of meaningful security benefits — to accept a deal with Iran that is likely to be unpopular in the Jewish state. Or he was looking to appease Republican hawks who openly wondered at the weekend whether he was going to cave to Iran in a framework deal that looks likely to make little near-term headway on critical nuclear questions. Trump’s critics, however, may conclude that he’s looking to fill the ether with another social media post, either to distract from the torturous pace of talks with Iran or to portray himself as striving for another famous victory after a war that frustrated his expectations of a quick and overwhelming win. Why the Abraham Accords claim won’t work. Many Gulf Arab states have higher priorities right now than worrying about their future relationship with Israel. The conflict, which some states didn’t want, has badly damaged the business model and stability of Gulf nations trying to reinvent themselves as oases for well-heeled Westerners. The region’s economy has been debilitated by the closure of the Strait of Hormuz, a possibility that every foreign policy expert expected — but that caught the Trump team by surprise. When the war ends, these US allies will face a new environment that could include a more unstable and aggressive Iran. They may review their national security postures after an association with Washington and the US armed forces saw them come under attack from Iranian drones and missiles. The need for regional structures may supersede new compacts with Israel. And Trump is asking Arab states to take an unpalatable leap. Israeli Prime Minister Benjamin Netanyahu is deeply unpopular with their people, partly due to political impediments that predate the Iran war. Saudi Arabia, for example, has long made clear that joining the Abraham Accords would be conditional on a path being set up to Palestinian statehood. This seems further away than ever after the deaths of tens of thousands of civilians in Gaza during the Israeli onslaught after the October 7, 2023, Hamas terror attacks on Israeli civilians. Continued Israeli operations in the enclave and violence by extremist settlers in the West Bank have further narrowed political room for compromise. Israel is showing it believes

that keeping its security will be a perpetual task — a stance that will further strain regional politics. It said on Monday, for instance, that it plans to intensify operations against Hezbollah in Lebanon — a step it says was coordinated with the US. “A lot of regional perceptions of Israel are not at all flattering,” Hasan Alhasan, a senior fellow at the International Institute for Strategic Studies, told CNN’s Becky Anderson on CNN International on Monday. “I think a lot of countries in the region see Israel’s actions as highly dangerous, destabilizing,” said Alhasan, speaking from Bahrain. “Israel was one of the two main actors that began this regional war, and I think countries are increasingly coming together to counterbalance Israel’s strategic aggressiveness in the region. “CNN military analyst Cedric Leighton, a retired US Air Force colonel, described Trump’s plan as in many ways 'wishful thinking.' He said on CNN News Central that it “makes sense from a strategic standpoint to get Iran on our side eventually, which is part of what Trump is looking at. But we’re not there yet. “Leighton added: “And certainly to get the Arab nations to agree to be part of the Abraham Accords and to recognize Israel at this particular point in time, which might be a bridge too far.” A general election in Israel later this year also makes it unlikely that Saudi Arabia or other states that distrust Netanyahu’s far-right coalition would enter into new agreements even if the war with Iran ends. A persistent flaw in US Middle East policy. The Abraham Accords were signed in 2020 between Israel and four Arab states (Morocco, the United Arab Emirates, Bahrain, and Sudan) and were regarded by Trump’s aides as one of the great achievements of his first term. Trump has always envisioned expanding the accords — and this seemed a possibility early in his second term, when his team negotiated a ceasefire in Gaza and laid out so far unrealized plans to solidify a permanent peace. But the idea of a massive expansion of the Abraham Accords when the US side has so far not secured the opening of the strait, let alone resolved the question of Iran’s nuclear program, seems almost absurd. Trump envoys Steve Witkoff and Jared Kushner have long grasped for huge goals in the Middle East and Ukraine and have so far fallen short, leading critics to question the wisdom of sending two business tycoons to unpick knotty diplomatic problems. Their relative lack of success has undermined the central conceit of Trump’s presidency: that he’s a masterful negotiator and historic dealmaker who can nail breakthroughs that would have been beyond past presidents. This could be another case of Washington embracing positions that look logical or possible from the Western Hemisphere, but that dissolve on contact with the Middle East. This is not only a failing of the Trump administration; it’s been a flaw of US policy for much of the 21st century, including in Iraq and Afghanistan. The impracticalities of the strategy are reflected in Trump’s inclusion of Pakistan on his list. Joining the Abraham Accords would require an enormous shift in a Muslim nation with already volatile political conditions. While Islamabad has looked to cozy up to Trump, it has never officially recognized Israel and has no public plans to do so. Trump allowed that several nations in his list might have reasons not to join. ...In any case, there is reason to question whether — after he launched a war that has sullied American power and influence — his requests really matter.

The very idea was ridiculous to begin with, as Collinson correctly noted above in his article. Trump thought that if more countries signed up to the accords, it could placate some Iran hawks in the Republican Party who have expressed misgivings about the potential deal. Despite Trump's desires, these Muslim countries are highly unlikely to agree.

Meanwhile, Iran likewise discounted the hopes for an imminent deal to end the war and reopen the strait, which Iran has blockaded. "We have indeed reached conclusions on a large portion of the issues, but no one can claim that the signing of an agreement is imminent," Baghaei, the Iranian foreign ministry spokesperson, said on May 25.⁵⁸³

Iran has said any agreement should also end the fighting in Lebanon. But Netanyahu said on May 25 that Israel intends to intensify its attacks against Hezbollah, Iran's ally. Meanwhile, in Israel, talk of a potential deal was received with concern, with some politicians warning it would fail to constrain Iran's nuclear capabilities.⁵⁸⁴

Ending the US-Israeli campaign against Iran would allow Trump to extricate himself from an unpopular war that has battered the global economy. But the current proposal pushes off many of the toughest issues for future talks, including Iran's nuclear program.

In Doha, Iranian and Qatari officials were discussing what to do about two critical issues: the Strait and highly enriched uranium in Iran. Even if an agreement between the US and Iran is reached, the flow of oil and gas from the Middle East could take months to return to normal. A lot must happen before the 1,500 ships stranded in the Persian Gulf can start moving. On May 24, Iran had, in principle, committed to giving up stockpiles of enriched uranium that could become the basis for a nuclear weapon. But Baghaei said Iran was not discussing details of its nuclear program.⁵⁸⁵

News of a deal followed a roller-coaster few weeks, with Trump at times threatening to restart attacks on Iran, and at others saying there had been progress in final negotiations to stave off a return to full-scale war. But all the while, Trump had offered few details.⁵⁸⁶

Meanwhile, oil prices fell sharply on May 25, with Brent crude, the global benchmark, down more than 5 percent, to about \$95 per barrel. The price of oil is still around 30 percent higher than it was before the war.

Meanwhile, the senior leaders of Pakistan, which has been brokering the talks between the United States and Iran, visited China on May 25. China has close commercial ties with Iran and is the biggest buyer of Iranian oil. Sharif, the Pakistani prime minister, posted on social media that he and other top officials had met with President Xi and discussed the peace talks.⁵⁸⁷

Despite the expectation for a deal, there is a lot still to be agreed upon. A lot of details still need to be ironed out. Trump has continued to talk about the things that he wants to see in the deal. On May 26, Trump talked about how the "nuclear dust", the enriched uranium, had to be either removed from, or destroyed, in Iran itself because they simply could not afford that be given to the Iranians. Therefore, there was still a lot of ground to cover. Still, a lot of talk goes on. We are not on the verge of a deal.⁵⁸⁸

Such talks are painstaking as a lot of details must be completed, which take weeks, and cannot happen in a few days. Therefore, the talks should go ahead without the media limelight. Most importantly, Trump should cease to comment daily on the progress. But still, the current Doha talks should be considered as a positive development.

On May 29, Pakistani Foreign Minister Dar is expected to hold talks with Rubio that are expected to include the latest developments in negotiations on ending the Iran war. A first round of peace talks in Pakistan concluded without a pact, but Tehran and Washington had reached an agreement to extend a ceasefire announced in April and lift restrictions on shipping through the Strait of Hormuz. Pakistan's bid to mediate an end to the Iran conflict has been led by strongman Munir. Trump, who has praised Munir, has repeatedly said an end to the war is close since mid-March, though Washington and Tehran have shown little public movement toward common ground.

Iran has called for sanctions to be lifted, foreign assets to be unfrozen, and U.S. forces to be withdrawn from the region, while the United States has called for Iran to dismantle its nuclear program, which Tehran says is for peaceful purposes.⁵⁸⁹

The most urgent issue is the freeing of traffic in the Strait of Hormuz. No oil tankers transited the strait in the past 24 hours, although a Chinese-flagged vehicle carrier did cross on May 29. Several supertankers and liquefied natural gas (LNG) carriers were week. Iran said 24 vessels had passed through the strait in the past 24 hours, reiterating that none would transit without authorization from the IRGC. Trump, however, has yet to approve the agreement, and Iran reiterated on May 29 that it had not been completed, saying it had undergone changes in recent days.⁵⁹⁰

On May 29, Trump said he would make a final decision over a deal with Iran to extend their ceasefire that would need to include opening the Strait of Hormuz and dismantling Tehran's capacity to make a nuclear weapon.

A deal was in the offing to extend a truce in place since early April for another 60 days to allow oil and gas shipments to resume through the strategic waterway while negotiators tackle tricky issues such as Iran's nuclear program. "Iran must agree that it will never have a nuclear weapon or Bomb. The Hormuz Strait must be at once open, no tolls, for unrestricted shipping traffic, in both directions," Trump added that mines would be removed from the strait, and ships trapped there may start to go home. He said that no money would be exchanged "until further notice" - a reference to Iran's demands for toll payments in the strait, war damage reparations, or a release of Iranian funds frozen abroad.⁵⁹¹

On May 29, Iran and the United States were in discussions to extend their ceasefire to start negotiations on issues including Tehran's nuclear program. The US insists Iran must not be able to make a nuclear weapon. While much of Iran's uranium enrichment infrastructure was destroyed or severely damaged when Israel and the U.S. bombed it in June, a large part of

the highly enriched uranium it amassed is thought to have survived. That is the biggest U.S. concern ahead of nuclear talks. On May 29, Trump said that Iran must agree that the enriched uranium buried underground after earlier U.S. strikes be "unearthed" and destroyed in coordination with Iran and the U.N. nuclear watchdog.⁵⁹²

One of two fissile materials, along with plutonium, with which one can make the core of a nuclear bomb.

While plutonium is usually extracted from the spent fuel of a nuclear reactor, requiring large and highly visible infrastructure, uranium can be enriched using centrifuges that have a much smaller footprint.

Two of Iran's three enrichment sites that are known to have been running when Israel and the U.S. attacked in June were underground. The above ground one was clearly destroyed. Uranium is highly enriched when it has reached 20% purity, and weapons-grade as of around 90%. Modern reactors use fuel enriched to up to 5%, but some use fuel enriched to higher levels. The ones that power U.S. nuclear submarines use fuel enriched beyond 90%.⁵⁹³

Iran has not informed the International Atomic Energy Agency (IAEA), the U.N. nuclear watchdog, about the fate of its enriched uranium since the June attacks or let its inspectors return to the sites where it was stored. The IAEA estimates Iran had these amounts when the first Israeli bombs fell on June 13:

- 440.9 kg enriched up to 60%
- 184.1 kg enriched to up to 20%
- 6,024.4 kg enriched to up to 5%
- 2,391.1 kg enriched to up to 2%

According to an IAEA yardstick, the amount at 60% is enough, if enriched further, for 10 nuclear weapons. 20% stock would be enough for one, and the 5% could produce 12. How much has survived is unclear. IAEA chief Grossi has said his agency believes "a bit more than 200 kg" of the 60% stock is stored at a tunnel complex in Isfahan that appears to have been unharmed by the June attacks. Some were also at the Natanz nuclear site, he said.⁵⁹⁴

The US concern has been focused on the 60% material because that would be easiest and thus quickest to make a bomb with. Washington wants it gone. Iran denies seeking nuclear weapons. As the enrichment level of uranium increases, it becomes exponentially easier to enrich further. Getting from 60% to 90% is easier than getting from unenriched to 5%.

Much earlier in 2018, Trump pulled the US out of a nuclear deal between Iran and major powers that kept Tehran at a far greater distance from being able to produce an atom bomb than it is at present. The US withdrawal had caused the deal to unravel, and Iran quickly expanded its atomic program.⁵⁹⁵

Kazakhstan has signaled it is willing to take Tehran's stockpile of uranium enriched close to weapons-grade levels if the U.S. reaches a deal with Iran, the head of the U.N. nuclear watchdog, Grossi, said. Kazakhstan hosts an internationally controlled bank of low-enriched uranium to ensure fuel supplies for power stations in IAEA member states.⁵⁹⁶

But earlier, Iran's top negotiator Qalibaf had sounded skeptical. "We do not trust guarantees and words; only actions are the criterion. No action will be taken before the other side acts," Qalibaf said, without elaborating.

"The winner of any agreement is the one who is better prepared for war the day after."⁵⁹⁷

The war launched by the U.S. and Israel on February 28 has killed thousands of people in Iran and Lebanon and caused global economic pain by pushing up energy prices due to Iran's effective closure of the Strait of Hormuz. Oil prices fell LCOc1, and stocks rose on May 29, over the potential deal.⁵⁹⁸

Earlier, Rubio said, "We have to have a diplomatic solution that is very clear on the topics they are willing to negotiate on and the extent of the concessions they are willing to make at the front end to make it worthwhile." Earlier, Iran and the US had reached a tentative agreement to turn the existing ceasefire into a more long-lasting settlement, US officials said on May 28. But on May 29, Trump made a series of demands - on the Strait of Hormuz, Iran's nuclear program, and the unfreezing of Iranian assets held overseas - that did not go down well in Tantrum's assertions, were "a mixture of truth and falsehood" and an attempt to project a "manufactured victory," said Iran. "The 'musts' that the Americans bring up are actually requests," said Iranian Foreign Ministry spokesperson Baghaei.

US Defense Secretary Pete Hegseth said on May 30 that he had spoken to Trump, who "wanted me to reiterate how patient he is in ensuring that with America undertaking this kind of historic endeavor, any deal will be a good one, a great one, and he's patient in the pursuit of that."

Both sides regard agreement on navigation through the Strait of Hormuz as a first step, after three months of paralysis in the critical waterway that has caused a sharp spike in the price of crude oil and other commodities.

"The Hormuz Strait must be immediately open, no tolls, for unrestricted shipping traffic, in both directions," Trump said May 29, with Iran responsible for demining the seaway. At the same time, the US naval blockade of Iranian ports would be lifted, Trump said.⁵⁹⁹

Iran would allow shipping through the strait to return to pre-war levels over 30 days, according to some accounts of the MoU. Shipping sources say the industry will want a period of sustained calm before sending vessels through.

Trump has insisted on free, unhindered navigation; Iran continues to insist it has a right to manage traffic through the international waterway, in association with Oman. Finding language to square that circle will be challenging.⁶⁰⁰

Iran is pursuing “the smart management of the Strait of Hormuz,” according to Ebrahim Azizi, head of the Iranian parliament’s National Security Commission, in an interview on May 29.

“Iran’s control measures and arrangements in the Strait of Hormuz are permanent in nature and certainly not temporary,” Azizi said.

Trump has warned Oman – a traditional ally of the West - against any arrangement with Iran.

“Oman will behave just like everybody else, or we’ll have to blow them up,” he said during a cabinet meeting on May 29. “They understand that. They will be fine.”⁶⁰¹

How the restoration of navigation is synchronized with Tehran’s demand for an immediate end to the blockade of Iranian ports by the US Navy will also be crucial.

As of May 29, 115 commercial vessels have been redirected to ensure no commerce enters or leaves Iranian ports, according to Centcom. By continuing the naval blockade and making excessive demands in negotiations, he has once again proven that he is not inclined toward negotiation and is pursuing other aims,” Mohsen Rezaei, an adviser to Supreme Leader Mojtaba Khamenei, said May 30.

Iranian claims that the MoU will call for US military forces to withdraw from the vicinity of Iran in tandem with the end of the blockade, and that “military ships are not included in this commitment” to reopen the strait. Trump made no mention of a withdrawal in his statements on May 30. The nuclear file. It is only when the MoU is signed that the clock starts ticking on a 60-day negotiation period to address Iran’s nuclear program, including the fate of its stockpile of highly enriched uranium. This was the main issue during negotiations brokered by Oman last year and in February. Uranium is a key nuclear fuel that can be used to build a nuclear bomb if enriched to elevated levels. Iran is thought to have more than 440 kilograms (970 pounds) of highly enriched uranium. Trump repeated his reddest of red lines on May 29. “Iran must agree that they will never have a Nuclear Weapon,” he said on social media. He went on to say that Iran’s stockpiles, which are buried after US strikes last June, will be unearthed in a joint US-Iranian operation and destroyed - an assertion quickly repudiated by Iranian state media. Trump has said that he would not want the uranium sent to Russia or China. Russia has repeatedly offered to receive it. It’s unclear how or whether Iran’s extensive stocks of less-enriched uranium will be part of the negotiations.

Azizi, the senior parliamentarian, said May 29 that “Iran does not intend to transfer its enriched uranium to a third country.”

The first MoU was not expected to cover Iran’s nuclear enrichment program in any detail. Trump has previously said that a suspension of uranium enrichment for 20 years would be acceptable. Iran is understood to have offered a much shorter suspension.

Iran's economy was in deep trouble before the war broke out, and unemployment has surged since.

A written message from Khamenei on May 28 urged parliament "to prioritize reconstruction, economic stability, and rebuilding war-related damage."

Iran is demanding the immediate unfreezing of billions of dollars in assets held in banks overseas. But the unfreezing of Iranian assets would occur only once the Strait of Hormuz has reopened. In a clear reference to those assets, Trump said May 29 that "No money will be exchanged, until further notice."

Iran believes that if Tehran and Washington agree to the memorandum, \$24 billion worth of Iranian assets could be released. Half that sum could be released when the deal is first announced.

There have also been discussions around an investment fund for Iran that would provide billions of dollars for reconstruction once a final deal is reached. The US would not invest in the fund, and the bulk of the money would come from Gulf nations. Iranian officials in April estimated that damage worth \$270 billion had been caused by US and Israeli strikes.

The US had been using the refrain "no dust, no dollars" to link the removal of the highly enriched uranium with Tehran's financial demands. As with Iran's frozen assets, sanctions imposed on Iran will only be lifted once the Strait of Hormuz is open and fully functioning again.

Iran's economy is suffering from a huge array of international sanctions, most of them imposed by the US and Europe. Those are not expected to be lifted at once but tied to the nuclear file.

"Details must be negotiated after the memorandum is finalized," according to Baghaei.

Iran estimates removal of sanctions on oil sales alone could generate \$10 billion in revenue for the government over 60 days.⁶⁰²

It is also unclear how or whether the conflict between Israel and the Iranian-backed Hezbollah militant group in Lebanon will be addressed in any memorandum. Over the past week, Iranian officials have stressed that the MoU will apply to the "end of the war on all fronts, including Lebanon."

In the last few days, Israeli forces have extended their incursion deeper into southern Lebanon and ordered new evacuations, while Hezbollah has continued to fire drones and rockets towards Israel and inflicted casualties on Israeli troops inside Lebanon.

The ceasefire agreed at Washington's behest in mid-April survives in name only, and the Trump administration has doubled down on its support for the Israeli campaign.

Trump told Netanyahu earlier that he supports the country's wish to "maintain freedom of action against threats on all fronts, including Lebanon." Meanwhile, Ghalibaf said on May 29. "We have no trust in guarantees or words—only actions are the measure. No action will be taken before the other side acts," Iran's senior negotiator.⁶⁰³

Tim Lister, “What to watch for in the US-Iran memo to end the war,” May 30, 2026, brilliantly explains that:⁶⁰⁴

The draft agreement between the United States and Iran is taking shape. That is because language and sequencing are everything; every word will be parsed and debated; every connection between one element and another scrutinized. For example, will the 60-day process envisaged in the MoU be defined as an extension of the weeks-long ceasefire or a definitive end to hostilities? Even if the MoU is just a page covering about a dozen points in brief, as many accounts have suggested, it’s not that simple....The sequencing of a process that is due to unfold over two months is critical....And lastly: trust – and verify. The negotiations are overshadowed by a continuing lack of trust on both sides. Iranian officials never tire of saying that we have twice attacked the country in the last year while negotiations were ongoing.

The two sides are still at odds on several other issues, such as Tehran's demands for the lifting of sanctions and the release of tens of billions of dollars of Iranian oil revenues frozen in foreign banks.

Israel's war in Lebanon with the Iranian-backed Hezbollah militia is another major obstacle.

Meanwhile, the negotiations continue despite the challenges. The main problem is that Iran doesn't have any confidence in the US as a negotiating partner. Given the past series of US actions, which is understandable. The US had broken agreements and conducted military strikes in the middle of talks. Trust was eroded through actions that amounted to declarations of war, including the assassination of General Qassem Soleimani in 2020, the strikes during last year's nuclear negotiations, and the current conflict. The official US rhetoric, not just towards Iran, but to the entire world, was also a factor.⁶⁰⁵

The US will also waive several sanctions on Iran, allowing it to sell oil freely.

Include a commitment from Iran not to seek a nuclear weapon. The first issue to be discussed in the 60-day window will be Iran's uranium enrichment program and how to dispose of Iran's stock of highly enriched uranium.

Hold a mechanism for Iran to receive humanitarian aid. Additionally, the US will commit to discussing sanctions relief and unfreezing Iranian assets overseas.

As of June 1, there was a glimmer of hope. Previously, regional tensions had escalated since the US and Israel launched strikes against Iran in February. Tehran had retaliated with strikes targeting Israel as well as US allies in the Gulf, along with the closure of the Strait of Hormuz. A ceasefire took effect on April 8 through Pakistani mediation, but talks in Islamabad did not

secure a lasting agreement. Trump later extended the truce indefinitely while keeping a blockade on vessels traveling to or from Iranian ports through the Strait of Hormuz. The ceasefire has mostly been kept, despite occasional exchanges of fire. More than 2,000 people have been killed during the war that the U.S. and Israel launched on February 28, which has upended markets, spiked fuel costs, fueled global inflation fears, and convulsed the postwar Western alliance.

Most importantly, an unintended consequence of the war is the strengthening of Iranian leverage through the de facto control of the Strait of Hormuz. For Iran, flexing control over the Strait of Hormuz is a new deterrent. Iran's government could appear from the conflict with a blueprint to use it. Most importantly, the war was now escalating with no de-escalation in sight. This is a dangerous moment as the needed off-ramp is not available. The war will further engulf the region in destabilization and turmoil. The global economy will suffer further because of the oil and gas price shocks and disruptions of commerce. War shall lead to unintended consequences. Surely, the entire world will suffer as a result. We wish it were otherwise.

For Trump and his Republican Party, the implications of a continued impasse are grim. An unresolved conflict would mean the global economic fallout, including high US gasoline prices, would persist, putting further pressure on Trump, whose poll numbers were falling, and darkening Republican candidates' prospects ahead of November's midterm congressional elections.

Given the recent developments, the chances of a breakthrough are encouraging as back channels led by primarily Pakistan, and then Qatar, have been working tirelessly. There can be a peace deal between the US and Iran. History suggests so. Countries do not have permanent enemies, as they have only national interests to protect. In the Second World War, Germany and Japan were mortal enemies of the US, but now they are close friends. Circumstances can change, and even the US can become friends with Iran, as before the Islamic Republic was founded. It is possible that a peace deal between the US and Iran can happen. However, a peace deal between Israel and Iran is not possible. Israel is committing aggression in the region and is being duly opposed by Iran. The enmity between Israel and Iran is very deep. Even if there is a peace deal with the US, Israel will remain bent on the destruction of Iran. Eventually, the US can obviously stop it. Regional politics are changing. A strategic alliance of Russia-China-Iran has appeared. The nature of international politics dictates that China and Russia will help Iran against the US-Israel alliance. Meanwhile, Iran will do whatever it takes to survive. Iran will be victorious if it can survive the joint US-Israeli aggressions of the war.

The Islamic regime will remain intact and powerful as it has a sturdy foundation in the Iranian state and society. It has built a system that now sustains it. Benoit Faucon, in his article "The Web of Patronage That Keeps Iran's Regime in Control" published in the Wall Street Journal, March 29, 2026, explains that:⁶⁰⁶

Iran's sprawling security apparatus isn't solely held together by ideology. It is underpinned by a system of economic incentives that makes the regime's collapse a direct threat to the livelihood of its acolytes. Since its founding, the Islamic Republic has built a tentacled ecosystem that controls more than half of the economy and acts as a powerful protection policy for the regime. It rewards loyalists with cash, careers, and other opportunities in exchange for crushing dissent and staying true to the regime, say academics and analysts who study the Iranian regime.

External factors are also supportive of the continuation of the Iranian regime. International politics is becoming both intense and complicated now. If Iran falls, both China and Russia lose a valuable strategic partner. Therefore, both will continue to back Iran only because it is an adversary of the US, which happens to be their adversary as well. In other words, China and Russia will not let Iran collapse altogether. Russia is already helping Iran with intelligence sharing and upgrading drone technology. China is also supplying some weapons. If the war prolongs any further, both will ramp up their support to Iran, making sure it survives the US-Israeli strikes.

Meanwhile, the global public opinion is now definitely all over the world against war. Except for Israel and a minority of Republican supporters inside the US, the people demand an end to the war. Therefore, suffice it to state now that the war must end soon, by whatever means possible, as it is getting disastrous. Most importantly, the war is continuing with no de-escalation in sight. This is a dangerous moment as the needed off-ramp is not available. The war will further engulf the region in destabilization and turmoil. The global economy will suffer further because of the oil and gas price shocks and disruptions of commerce. War shall lead to unintended consequences. Surely, the entire world will suffer as a result. We wish it were otherwise.

The US has been struggling to end the war it began with Israel three months ago. Trump has repeatedly said during the conflict that a deal with Tehran was close, and similarly threatened heavy strikes on Iran if it did not reach an accord.⁶⁰⁷

The conflict has caused the worst ever disruption to global energy supplies, blocking hundreds of tankers from leaving the Gulf while damaging energy and shipping facilities across the region. Meanwhile, Pakistan is helping to mediate talks between Washington and Tehran.⁶⁰⁸

War must end now for the sake of the region and even beyond. The way President Trump is conducting the diplomacy of war is not proper. He is not asking for professional help in the realm of diplomacy and instead depends on family and friends. This is leading to poor decision-making in the White House. At the end of the first month, President Trump is searching for a decent withdrawal plan and a face-saving for his beleaguered administration. The Trump administration underestimated the resolve of the Iranians to defend their country from US and Israeli aggression. Plus, the reliance on air strikes to defeat Iran was a mistake. However, a ground invasion by US and Israeli troops is not in the cards. What can happen is the occupation of Kharg Island by American marine forces and Israeli troops. Iran fears that Trump is just stalling for this eventuality and is not serious about negotiations with them.

All wars are politics by other means, as Clausewitz declared a long time ago, and this war is no exception. The problem for the US is that the Trump administration does not have a war strategy. Israel manipulated it to fight its war with Iran. There was no immediate and imminent threat to the USA before the war began a month ago. The US will have to pay a prohibitive cost for the blunder. But there is a glimmer of hope as Pakistan is acting as an intermediary in the proposed negotiations between Iran and the US for ending the war. The back-channel efforts by Pakistan might just work, as the country has excellent relations with the US and Gulf allies, as well as good relations with neighboring Iran. Pakistan is on a tight rope and is balancing its position between the adversaries. The proposed meeting is scheduled to take place in Islamabad in a day or two. China has expressed its hope of ending the war, and so have many other countries. Just maybe the Islamabad parleys can work out now. There are indications that they might do it.

The Trump administration should know too well the problem of entering a quagmire when a ground invasion of the Iranian mainland occurs. After all, it is easier to win battles than to shape long-term political outcomes. Then, overreliance on military solutions while ignoring political and economic tools is not right. Most importantly, the US is now a victim of mission creep and unclear goals. Initial aims have shifted over time, which makes success hard to define and measure. The Trump administration also had intelligence failures and flawed assumptions. It underestimated Iran's capacity to withstand and then retaliate against American and Israeli strikes. Finally, the cost of the war versus the possible outcome. The US and Israel did not expect the prohibitive costs to be incurred now as the war rages on. The Trump administration has failed to learn these from failed wars in Afghanistan (2001-2021) and Iraq (2003-2011). The war is now proving to be exorbitantly costly to the US and Israel. Surprisingly, Iran has suffered enormously in the old war but continues striking Israel and the Gulf region. Notwithstanding Iran's dismal condition, it has built a strong nationalism fervor, and the "rallying around the flag" phenomenon has taken hold of the nation. The Islamic Republic is still intact and has even built a strong narrative of resilience to American and Israeli aggression. Therefore, Iran will continue fighting on. Undoubtedly, Iran had planned to conduct a prolonged asymmetrical war with the US-Israel and had prepared for it for decades. Iran's strategy now is to impose a prolonged economic shock to force Trump to back off. Iran's military command said that the world should prepare for oil prices of \$200 a barrel.

The US-Israel war of choice must end now for the sake of the region and even beyond. The way Trump is conducting the war's diplomacy is very inappropriate, to say the least. He has no knowledge or knowledge of the sophistication needed in the realm of diplomacy. Moreover, he is not asking professionals in the State Department to conduct it and instead depends on family and friends. This is leading to poor decision-making in the White House. At the end of the first month, President Trump was searching for a decent withdrawal plan and a face-saving for his beleaguered administration. The Trump administration underestimated the resolve of the Iranians to defend their country from US and Israeli aggression. Plus, the reliance on air strikes to defeat Iran was a mistake. The law of diminishing returns suggests there is a limit to the number of strikes that can be done on the enemy. After all, how many campaigns can one

conduct without a political backlash? The US and Israel cannot go on forever striking Iran without bearing the cost of the political backlash to their aggressions.

The Trump administration had earlier decided that a ground invasion of the Iranian mainland by US and Israeli troops was not a practical choice, as it was considered too dangerous for obvious reasons. The war could have turned into a prolonged ground battle. Later, the Trump administration had also discussed options to send ground forces to Iran's Kharg Island in the northern Persian Gulf, the hub for 90% of Iran's oil exports.

The US has been struggling to end the war it began with Israel more than three months ago. Trump has repeatedly said during the conflict that a deal with Tehran was close, and similarly threatened heavy strikes on Iran if it did not reach an accord. The US should end the war, despite the aims of its partner, Israel. The Trump administration should now grasp the opportunity and make peace with Iran. There is no doubt that the Iranian regime is extremely repressive, cruel, and corrupt, but that does not mean that the US should replace it. Anyways, a replacement of the Iranian regime would require a massive ground invasion, which is not even contemplated by the Trump administration. Therefore, the idea of whether there is any should be discarded at once. After all, the US does business with other even more repressive regimes like India, Egypt, North Korea, China, and even Israel itself. It is not the responsibility of the US to intervene in other nations' internal affairs and set things right, as it sees it. This would be a violation of international law and the UN charter, also. It is time for the US to make peace with Iran by recognizing the Islamic regime, no matter how much it is disliked by the American establishment. The American people overwhelmingly want peace, not war with Iran. Therefore, the Trump administration should have taken the difficult path of diplomacy with Iran to resolve the outstanding nuclear issue. Unfortunately, that did not happen as both the US and Israel had decided otherwise. Many American leaders could not come to understand the true nature of the political situation and the political compulsions of the Iranian nation. The Trump administration faced a choice, and it erred because it listened to only favored viewpoints. In hindsight, Trump should have ignored such hawkish views. But they were not, and that was the problem with the current Trump administration. Too many extremist views got accepted in their top decision-making circles. Obviously, that made for bad policy decisions like the mess in the war in Iran. The US president is under intense political pressure at home to reach an accord that would reopen the Strait of Hormuz - a key route for global supplies of oil and other commodities. Gasoline prices are high. Resultantly, Trump's approval rating had plummeted with congressional elections looming in November.

The war's economic consequences would have far-reaching global ramifications. The international energy markets had been thrown into turmoil by the war. The global economy will take time to recover. The International Energy Agency has described this as "the largest supply disruption in the history of the global oil market." The IMF had described it as an "abrupt darkening" of the outlook for the global economy. Its latest forecast in the World Economic Outlook warns of slower growth and higher inflation. The IMF estimated global growth at only 3.1 per cent this year, with headline inflation projected to rise, in what it called a "sharp

deviation" from the global disinflation trend of recent years. This could cause a global recession.⁶⁰⁹ A recent UNDP report had warned that the war's fallout could drive over 32 million people worldwide into poverty. The economic shocks involved energy, food, and weaker growth would hit the poorest countries the hardest and meant 'development in reverse' for them. Kristalina Georgieva, the head of the IMF, had claimed that even if a durable peace were achieved, the war would permanently "scar" the global economy and result in long-term damage to living standards. The security, economic, and diplomatic consequences of the Iran war would be felt for a long time to come.⁶¹⁰

Most importantly, the US does not really have a strategy to begin with and has continuously fluctuated in its aims. Finally, the US is now trying to break the resolve of the Iranian regime through sheer economic pressure applied by the institutionalization of a maritime blockade. The Trump administration is now convinced that the strangulation of Iran's oil trade, which sustains regular life there, would trigger societal collapse. This will build unbearable pressure on the regime to bow to US demands to permanently renounce its nuclear program. There was simple logic that applied to the strategy. Obviously, any nation will crumble if it cannot ensure access to the basic economic requirements to sustain itself. The Trump administration was convinced that rising inflation, immense job losses, and shortages in Iran were due to the blockade. Therefore, the ongoing blockade is an alternative to military operations that have failed to get the job done. It was also an answer to the closure of the Strait of Hormuz by Iran. But this will not work as Iran is very resilient. Trump wrongfully n that the Iranian nation would revolt against the ruling Islamic regime, but it will not happen. Meanwhile, Trump's approval ratings are at historic lows, and Republicans fear losing the House and facing an uphill fight to cling to the Senate in November.⁶¹¹

Given the record of his frequent flip-flops, Trump's threats have lost all credibility. Iran and the US are just stuck, and their stances are too far apart in terms of what they are willing to accept to arrive at a peace deal. And then there is the ego of Trump that causes skepticism in many people about any outcome of the war situation. Former State Department Iran official Eyre, who took part in past US-Iran talks, said an agreement may be out of reach. "These two sides will never reach a deal. Trump does not want to just win; he wants to humiliate Iran and be seen as having crushed Iran."⁶¹²

Despite Trump's erratic behavior and egotistic personality, there are larger issues at play here. No one wants the war to continue, as it is hurting everyone now. Since neither Iran nor the US wants to go back to war, and the pressure on both is so great, there is now a glimmer of hope that a sort of peace deal may be achieved. However, things cannot be rushed, as a proper peace deal between the US and Iran needs more time and patience. There is no use in pretending that a fragile deal can anchor a new Middle East order.

Given recent developments, there is indeed progress in the path to peace in the Gulf region. A peace deal between the US and Iran may eventually happen. The peace deal will happen not because of Trump but despite him, as the entire world minus Netanyahu and Trump supports it. More importantly, the world is changing as we speak. The US is a declining superpower largely

because of the poor leadership of Trump. What is likely to happen next is a restructuring of regional politics. There will be more appreciation for Chinese global leadership, and a real, more diminished view of American leadership. Another unintended consequence of the folly of the US-Israel war with Iran is the growth of a new Muslim alliance, which includes Saudi Arabia, Qatar, Pakistan, and Turkey, and will be backed by China. This alliance is in the making, and the foundation stone is the very recent strategic agreement between Saudi Arabia and Pakistan. Pakistan has already stationed a sizeable military force in Saudi Arabia. Turkey and Pakistan are collaborating in the joint buildup of their air force capabilities. More is to come soon enough.

Given Trump's inadequacies, the US power will decline in the entire region soon enough, at the cost of China's rise in the same region as it enters to fill the strategic gaps in the wider region.

Finally, the US would be a loser by the time the war finally ends. This was an unnecessary war to begin with. There was no compulsion for the US to wage war against Iran, as the country did not pose any immediate discernible threat. Although Israel was convinced otherwise. It was a war of choice, and the US will have to pay a huge cost for the folly.

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