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**War of Compulsions:
Interlinkages of
Regional and
Global Inflection
Points in Iran**

Lt Gen Devendra Pratap Pandey
PVSM, UYSM, AVSM, VSM (Retd)



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Abstract

War in West Asia is not of choice but compulsions at various levels— along overdue correction is being attempted by external and regional forces that had procrastinated on delayed actions. There are two ongoing major inflection points that, if continued uncontested, could alter the order that had existed for nearly a century in the world and half a century in the region. On the global stage, for the first time, US' supremacy was being tested across the entire spectrum of elements of national power; the challenger here was China. The conflict, initially restricted to Iran, has already become regional and is threatening to expand as others are being driven to either fulfil commitment of alliances and partnerships or the governments will be strained to take measures as the economy and the food security will be threatened. It will be years even after the war stops, for the world to recover from the spillover effects of the war and achieve economic stability. Hence, the Iran-centred conflict is representative of the global and regional systems under stress, wherein global rivalry and regional insecurity intersect reaching respective inflection points of “now or never”. Therefore, in this “war of compulsions” no actor can easily off-ramp without incurring unacceptable strategic costs.

Keywords: US-Israel-Iran Conflict, China, Economic Instability, Regional Escalation, US-China Rivalry

Iran is Just an Arena: Convergence of Two Inflection Points for Geopolitical Realignment

It is largely believed that the ongoing war in the Middle East is “Israel First” war wherein Trump and America have been drawn into unnecessarily; it is assumed to be centred on Iran as a restricted regional crisis involving Israel and Gulf monarchies. However, such a reading underestimates the structural forces driving the conflict. This is not just a regional conflict escalating to engulf the entire region, rather this is something beyond.

War in West Asia is not of choice but compulsions at various levels— along overdue correction is being attempted by external and regional forces that had procrastinated on delayed actions. There are two ongoing major inflection points, that, if continued uncontested, could alter the order that had existed for nearly a century in the world and half a century in the region. On the global stage, for the first time, US' supremacy was being tested across the entire spectrum of elements of national power. The challenger viz. China, was rapidly emerging as a major power centre contesting US supremacy quite overtly and aggressively across the diplomatic, informational and economic realms. On a critical front of military muscle, China was making rapid strides to close the gap of fulfilling one aspect of the Chinese Dream— of becoming a global power, or at least sharing the stage with the US. US, on the other hand, with stagnant economy and overstretched military, was in a steady process of decline. The direct or indirect friction between a declining (US) and the emerging power (China) was much awaited and inevitable.

The second inflection point was regional. In the West Asian region, a heavily sanctioned and isolated Iran was just weeks behind from achieving the much-wanted critical nuclear threshold. It also had built a significant stock of ballistic missiles that could reach and dominate the entire Gulf and beyond. The intention of the Iranian Regime, led by a theological and military conglomerate, was obviously to break the shackles of sanctions and pursue an ideological direction that was not in sync with other players in the region. It directly

threatened the security of Israel and American interests in the region that were tied to the Petrodollar eminence and control over critical earth material. The ambition of the nuclear armed and ballistic systems empowered Iran was also in direct conflict with Saudi Arabia and other Arab countries that were ruled by monarchies—half a century old religious and civilisational balance of Shia vs Sunnis and Persians vs Arabs was at a juncture to be upended.

USA, Isarel, Saudi Arabia, and other countries of the Gulf were aligned against Iran and the terror proxies of Iran in the region supported by China that has critical interests in West Asia. Iran, stuck on a nearly five-year-old revolutionary ideology of “Death to America” and “Death to Israel”, virtually offered itself to become a convenient arena and forced the entire region to be convulsed into a war that they never wanted but also could not stop. The world and the region will not remain the same, for better or worse, after the last embers of the ongoing war is extinguished.

It will also, however, have grave consequences for the world. The global economy, already stuttering, particularly for those who are totally dependent on import of energy from Gulf through Hormuz, will be severely impacted. As the Houthis will probably join the conflict in due course, those countries relying on energy flow through Bab- al- Mandeb will also be affected. The conflict, initially restricted to Iran, has already become regional and is threatening to expand as others are being driven to either fulfil commitment of alliances and partnerships or the governments will be strained to take measures as the economy and the food security will be threatened. It will be years even after the war stops, for the world to recover from the spillover effects of the war and achieve economic stability. In this war of compulsion, that would reset geopolitical alignments or realign the world and regional for decades, Iran has voluntarily become the geographic and strategic arena for overlapping rivalries.

Energy, Strait of Hormuz and Unrelenting Ideological Posture: Iranian Leverage or Curse

Oil, the very resource that enriched Iran and the leverage of Hormuz, due to the intimate control Iran, have suffered. Simultaneously, the unchanging strategic direction of the Iranian leadership—“Death to America” and “Death to Israel”—have made situations more worse. These could have been mere slogans for a clergy driven and Islamic Revolutionary Guard Corps (IRGC) controlled Regime to keep the population under religious influence and drive a wedge between the Monarchies, which hosted the “Great Satan” for security, and their population. But means to achieve the same proved detrimental to the common populace that had to suffer the sanctions and world isolation for past two decades besides the eight-year war with Iraq, multiple smaller conflicts and a ruthless suppression by a regime unwilling to let power go— Sadly, they are now facing direct destructive influences of war.

A larger and global competition intersected in Iran. Iran, held the largest reserves of oil and gas in the world and sourced nearly 90 % of the same to China. Iran also controlled the Strait of Hormuz through which more than 40% of the energy was exported to China. On the other hand, for the US, after taking control of Venezuela, having a compliant Regime in Iran and regulating Hormuz were next and logical steps to reassert its domination for the future. Denial through control of strategic pathway, via which critical resources like oil, gas, helium and other minerals were transported, was also a great strategy in play. Denial is also a great policy!

In the region, Israel, Saudi Arabia, UAE and others watched with fear the near completion of the nuclear program and the growing stockpile of the ballistic missiles of Iran. Iran was at the cusp of achieving a regional leverage to alter the balance, so carefully nurtured over decades, in favour of the Sunni-led Arab dispensation. The past one year saw developments of “now or never scenario” wherein any further delay would have led an already emboldened Iran to intimidate the region. A nuclear armed Iran may not be very pleasant for the region.

Operation Rising Lion by Israel and Midnight Hammer by US in June 2025 had delayed Iran’s nuclear ambition but not comprehensively destroyed. The time for intervention was slipping by. America under Trump 2.0 administration, was initially uninterested in the war, as he wanted to focus on domestic challenges of economy. US, however, was finally drawn into attacking Iran, in order to reset an emerging challenge to the American hegemony, in the larger world. Unfortunately, focused on the regional dominance, the Iranian Regime offered themselves at the altar to be sacrificed for China.

First Inflection Point: America’s Strategic Compulsion to Resist Rise of China

Chinese made it to the near top as second best to America in terms of economic power and military muscle through hard work, sacrifice and strategic vision that was driven by ‘silent discarding of the communist thought and exploitation of the great capitalist ideology’— it was rather combination of both. Ruthless subjugation of people within country, in lines of communists’ principles, was combined externally to compete in the world at large through capitalism and free market economy. The cheap and bulk goods, made through subjugated masses, were sold and dumped to the western world. China became a manufacturing hub by investing substantive resources to acquire technological knowhow through knowledge gain and transfer. A major effort went into reverse engineering. There was a hunger in the world for low end technological goods that allowed space for long term investment into research and development. China built an advanced industrial ecosystem and also became a hub for defence manufacturing. Riding on the wave of globalisation and open markets, China rapidly raced ahead of the major economies narrowing the gap with US.

It would have been a rational embracing of China, for the benefit of the larger world, as post Wall Street Collapse of 2008 and post Covid- 19 struggling world, India and China were the only two countries left that were driving the world economy in the 21st century as other Nations were stagnating. However, a major shock came from Xi Jinping who declared China’s ambition to be the second pole in a bipolar world, not only in the economic realm but also in the military realm. The 20th century and early 21st century peaceful world, was awakened to a new reality of the ‘rising Chinese Dragon that was breathing fire’. A dragon that was rapidly replacing western powers in the Third World and the resource rich countries securing energy and rare earth material for long term investments through muscular approach and debt diplomacy. Surfeit with funds and trained manpower, China expanded influence across countries rich in energy and rare earth material. China also invested significantly into Belt and Road Initiative (BRI) projects to overcome the challenges posed by choke points of Malacca and others along the sea lanes of communications (SLOCs). The BRI projects leveraged and influenced local political forces as well. Hence, US and the other western powers were gradually replaced.

US, with a stagnant economy, fractured polity at home, and increasing distance from Europe, was rapidly losing the power over the American continent itself. China, on the other hand, had started engag-

ing in South America replacing Russia and had also subverted the European markets and polity. China was leading the charge to bypass dollar—the ultimate power of the USA. China’s military, with the new and niche technology emerging, coupled with its aggressive stance and posture to threaten Taiwan and taking control of the South China Sea, disregarding genuine concerns and rights of the other regional stakeholders, had upped its ante. Doklam followed by Galwan conflict with India were few land-based infringements by China. As the other western countries had no power or leverage of significance to challenge China, it became the lone responsibility of USA to reclaim space.

With a rapidly narrowing window and a more combative China, in the economic domain, the military space and technological realm, the United States had to act. If China is allowed unfettered continued access to energy and resources that were secured silently over past few decades, the American empire risked strategic erosion. Though Trump had promised closing wars and conflicts during his second Presidency, there was no option but to reassert influence in key regions wherein the energy and critical earth material were being sourced by China. Rather than confronting China directly, the US decided to strike at its primary allies and partners through rationales that were real, created and manufactured.

The silence of China when Trump intervened into Venezuela on the ‘trumped-up allegations’ drug running into USA, confirmed the absence of the Chinese will to directly contest American hegemonic actions. Venezuela, with largest oil reserves in the world, was an extremely important partner of China that imported nearly 90 % of its oil produced and had developed deep diplomatic and political connections. The daring act of kidnapping the Venezuelan President on the very day the special Chinese Envoy met him and was present in Caracas, was a major assertion of the American reclaiming the lost military space. The Tariff and Trade wars that Trump had started for which there was some push back from China was however a failed step—and then Iran came into the lens!

Iran, the second largest in the world in terms of oil and gas reserves combined, also sold its 90 % produce to China. Iran also controlled the “Strait of Hormuz”. More importantly, 40% of the Chinese import also sailed through this narrow 21 nautical mile passage.

The Strait of Hormuz and control over the Iranian oil was extremely significant for China after loss of Venezuelan supplies. Nearly 45 % of crude and 30 % of natural gas meant for China passed through Hormuz. The disruption in the region and that of the Strait of Hormuz directly hurts the Chinese agriculture sector and manufacturing of the next generation technology as 30% of global urea (fertiliser) and large quantity of the world’s helium, also passed through.

While US had reconciled to an intransigent Iran with a nuclear weapon capability, the opportunity when there was a growing demand by the regional powers to intervene was hard to resist. Thus, US actions in Iran were shaped by a global imperative to prevent strategic displacement. Iran only provided a timely opportunity after Venezuela. Iran was merely a gateway to be disrupted in the inflection point of world power competition. One struggling and the another emerging.

The Second Inflection Point: Nuclear and Ballistic Missile Capable Iran upsetting the Regional Balance

The more immediate and existential inflection point was regional upsetting of the balance of power between Iran led, Saudi led and US backed Israel. Iran, by its own admission, has 440 kg of 60 % enriched uranium and was weeks or months away from achieving the nuclear threshold. The 12 days bombing effort by Israel in June 2025 during Operation Rising Lion that was supplemented by the American overnight Operation Midnight Hammer, was able to only delay but not effectively degrade the Iranian nuclear ambition. A possibility of Iran procuring the nuclear weapon would permanently alter the status quo and balance of power, particularly when that ambition was never hidden by Iran.

Another dangerous threat on horizon was the declared ambition of Iran to stock up to 7000 long range, beyond 2000 kms Ballistic Missiles. That would put the entire Middle East and beyond, in the target range effectively. Nuclear tipped, the consequences were obvious. Iran already held approximately 3000 Ballistic Missiles. During Op Rising Lion, the Iranian Missiles were able to breach, the ‘unbreachable’ layers of Israel’s Air Defence systems successfully.

Within range, due to geographic proximity, the Saudis, UAE and others were particularly vulnerable as their entire infrastructure of energy sector was in danger. Therefore, the immediate threat was regional and imminent. The ongoing Operation Epic Fury and the retaliation by Iran, effectively targeting the energy infrastructure and blocking the Strait of Hormuz, has proved the fear to be right. The proclaimed Iranian Regime’s desire of “Death to Israel” and domination of the Sunni world was assured.

As the evidence has emerged, pressure from Saudis and others increased on the US to intervene as a nuclear capable Iran was unacceptable in the region. Even though Iran offered to dilute the enriched uranium or to hand over the same to a neutral party, but it could not be ensured. The patience of the troubled Arab world had been breached that knew there will be no change in the stance of Iran eventually and the peace offer, through the Omanis, was merely buying time as was done through failed promises earlier.

For once, the Israelis and Saudis and other regional countries were on the same page. Threat from a nuclear Iran with huge stocks of Ballistic missiles must be stopped, even if preemptively. However, on part of Iran, an inflection point of ‘now or never’ was achieved.

Monarchs of Gulf and Iran

The Monarchies of the Gulf had dual challenge— they lacked the military muscle to confront or even challenge Iran and therefore had to rely on the US for regional security balance. It translated into the ideological challenge as well. The presence of the American forces on the ‘land of pure’ was not appreciated by their population who were fed the logic of “apostates” by the clergy controlled by Monarchs. While the Monarchs were able to exercise domestic leverage through a Sunni supremacist ideology vs Shia Iran, but Iran came out as an ideological right in the Muslim world. Iran was clergy- led, as was mandated in the Quran, and was seen to be confronting the Big Satan (US) and Small Satan (Israel) together. The aligning of the Muslims in the region and across the world on the side of Iran during the ongoing conflict, has validated the concerns and fears of the Monarchs.

These countries had adopted a strategy of hedging through limited rapprochement with Iran seen as a balance for defence cooperation with US. It worked for decades, but the crossing of the nuclear threshold by Iran, would disturb the carefully nurtured regional balance in favour of Iran. The declining US and the reducing interests of the American Presidents to intervene in the region, was seen as a major threat by the Monarchs in their respective countries.

Iran As the Battle Ground: Preparation in Anticipation

Iran pursued the strategic direction of 'resistance to the American influence' since the 1979 Islamic revolution, to bind the country of disparate people. Iran invested in proxy networks over the decades that spread influence through violence across the entire region and beyond. The 3H (Houthi, Hamas and Hezbollah) became the instrument of state power that exercised significant influence through terror. Iran virtually controlled Syria and kept Israel embroiled in proxy battles. Iran also kept the Arabs on the edge. The Saudi- led Arab world wanted peace and stability in the region to diversify beyond the reliance on energy-based economy as the world was pivoting towards other sources of renewable and non-renewable energy. They were pursuing regional rapprochement with gradual acceptance of Israel as an entity amongst their folds. However, Iran could neither reconcile this acceptance of Israel in the regional grouping, nor could it change the stance of the religious supremacy that kept the Regime and the IRGC in control of the country. Any dilution in the five-decade old stance would lead to loss of control.

The Hamas attack of 07 October 2023 on Israel, was an action to disrupt the peace and stability in the region. As Iranian Regime celebrated the dastardly terror act, it was not prepared for the response of Israel. The assassination of top IRGC leaders, and total wiping out of the Hamas and Hezbollah leaders over next few months shocked the Regime. The degradation of Hamas, loss of control over Syria, and silencing of Hezbollah was also immensely disconcerting to Iranian Regime and their posture towards Israel and other Gulf countries hardened. As wide scale destruction followed in Gaza, Iran knew that Israel would come after the Regime.

Though Iran had prepared for the eventuality, the distraction of the western world towards the Ukraine conflict and the Tariff war of Trump was exploited to hasten the process of achieving the much-denied nuclear threshold and developing the ballistic missile capability. Iran also focused on developing low-end technology solutions like Shahed and tested them in the Russia-Ukraine conflict. Iran diversified and layered the decision-making systems to avoid collapse in the Iranian decision-making process, whenever decapitation strikes were conducted to take out the top rung of leadership. The mosaic defence strategy with dispersed IRGC and military units spread across 31 provinces at time of war, was part of the same preparations. Tunneling and fighting through a fire- and- hide tactics were developed to escape the exceptional battlefield transparency, the US and Isarel had developed.

Iran planned to hedge the Strait of Hormuz through which one-fifth of the world's oil passed. They prepared and also announced to the world of their extensive plans to block it through laying mines, or deploying subsurface unmanned underwater vessels, Fast Attack Boats and drones. The aim was to bring about world pressure on the US and its allies to avoid attacking Iran.

On 28 February 2026, the US and Israel executed Operation Epic Fury (US) and Operation Lion's Roar (Israel). While the Ayatollah and other top leadership of Iranian Regime were taken out during initial strikes, the response of the Iranian military, striking all the countries in the region and the continued resilience in face of the all-round destruction, affirms the readiness and willingness of the Regime to fight to the end. The Iranian Regime, hence, is well prepared to hedge disruption of Hormuz for its survival.

Conclusion: Breaking the Cycle of Compulsions

As the US responds to the rise of China under the garb of ending the Iranian Regime, the global and regional systems will remain gridlocked wherein the survival of one is contingent on destruction of other. Iran war is not driven by isolated direct decisions. These decisions have come to a head after 47 years of diligence by Iran and procrastination by the rest. Any pull back would alter the balance in favour of US. While the world would have to confront domestic political challenges due to the energy denial that passed through the region, the issue that still remains after six weeks of fighting is that as to which country would relent first. Iran has a capacity to persevere even through the destruction that it has suffered. Survival of the remnants of the regime, IRGC and the deathly Basij is contingent to the continuance of war. The more destruction in Iran, means more emphatically Muslims of the world would rally behind Iran. Israel and USA would know that this long-distance technology-based warfighting has a limitation. It can destroy a country but not defeat a regime that is carefully layered and structured. Only possibility is that, an intelligence-based regime upheaval is carried out through a well-armed and organised insurrection. Given the purge of the December 2025 and thereafter, the possibility of finding enough leaders to fight against the radicals in the country is a challenge. Hence, survival of such an administration will also be a challenge.

While the US has achieved the objectives of keeping the region in turmoil, thus denying the critical energy to China, the Israelis and Arabs in the region would want a regime change. However, the region and world would be altered forever as unknown and unforeseen circumstances will emerge, like, for instance, possible de-hyphenation of the US from Europe. Moreover, an effort of the world to rapidly move towards renewable energy, might also be challenged. For instance, climate conscious nations such as Germany, who initially gave up the nuclear energy or coal fired power plants, would likely reverse the process, to ensure energy security domestically. There is also a possibility of altering of the borders in the region.

The Iran-centred conflict is representative of the global and regional systems under stress, wherein global rivalry and regional insecurity intersect reaching respective inflection points of "now or never". Therefore, in this "war of compulsions" no actor can easily off-ramp without incurring unacceptable strategic costs. Breaking this cycle, will not only require addressing immediate tensions, but also require standardisation of the structural drivers of conflict viz. energy security, nuclear deterrence, and great power competition.

About the Author

Lieutenant General Devendra Pratap Pandey, UYSM, AVSM, VSM, (Retd) carries experience across various terrain and operational environments. Commissioned into the 9th Battalion, The Sikh Light Infantry Regiment, he has showcased exemplary leadership in diverse roles, including participation in Operation Vijay (Kargil) in 1999. With notable commands at Siachen Glacier, Chushul Sector in Eastern Ladakh, and prestigious appointments such as GOC of the 15 Corps in Kashmir valley, he has demonstrated exceptional proficiency in challenging scenarios. His illustrious career encompasses instructional roles at the National Defence Academy, service as a Military Observer in UNTAC, Cambodia, and pivotal staff appointments along the Line of Control and in Army Commands. Holding two postgraduate degrees from esteemed institutions like the Defence Services Staff College, Wellington, and the National War College at National Defence University, Washington D.C., as well as an M.Phil from the National Defence College, New Delhi, he is renowned for his strategic acumen and expertise.



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