



Plumes of black smoke were seen rising above an area near the headquarters of the US Navy's Fifth Fleet (Reuters)

How Might the United States and Israel's War on Iran Falter?

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What was framed as a swift and definitive strike against Iran is fast becoming something far more unpredictable and potentially more dangerous. The expanding US–Israeli war on Iran was sold, implicitly or explicitly, as a decisive blow: a campaign that would topple the regime, trigger mass protests, fracture the Iranian state, and reassert US–Israeli dominance across the region. Beyond the assassination of the country's Supreme Leader and an unknown number of Iranian military and political officials, US-Israeli bombardment has killed over 1,300 Iranian civilians, injured upwards of 10,000 more, and damaged over 13,500 civilian buildings. The latter includes more than 11,000 residential units, 2,300 commercial buildings, 65 educational facilities, 77 medical facilities, and various public squares, sports facilities, fuel storage facilities, and other critical civilian infrastructure. Yet

two weeks into the war, the opposite dynamic of the alleged decisive blow appears to be taking shape. Finally, the chaotically bombastic rhetoric by the aggressors has set a relatively low bar for the definition of failure.

The Iranian regime has not imploded and regional tensions are widening. Iran has damaged 17 US military and diplomatic sites across the Middle East, including military bases, air defense installations, and consulates and embassies. While Israeli military censorship has restricted the publishing of information about Iranian strikes, we know that at least 6,500 buildings, 1,400 pieces of equipment, and 1,400 vehicles have been damaged. The landscape of resistance to US and Israeli aggression has expanded to Lebanon and Iraq. Energy markets are flailing, as several Gulf-based oil and gas companies declare *force majeure*. US allies in the Gulf are increasingly uneasy. And the longer the war stretches on, the more it risks transforming from a demonstration of power into a concrete heralding of multipolarity.

These risks can be seen in Iran's internal steadiness, rising US and Israeli casualty counts, the surge of oil prices, heightened Gulf state anxiety, the mounting financial burden on Washington, the sustainability of Israel's defensive shield(s), and the quiet voyeur-like calculations underway in Moscow and Beijing. Taken together, these dynamics suggest that the longer this conflict endures, the more it risks producing consequences far beyond those its architects appear to have anticipated.

None of these risks automatically sound the death-knell of this aggression, as unknowns and unintended consequences abound. Still, these pressures are gaining ground and are unfolding simultaneously across four interlocking arenas: inside Iran; across the regional battlefield; in the global energy and financial system; and, latently, at the level of great-power competition.

While the US and Israeli architects of this war assumed that sustained military pressure would fracture the Iranian regime or trigger widespread anti-regime mobilization, the opposite dynamic has taken hold. Far from collapsing, the Iranian regime has thus far persevered and fortified its internal cohesion, not least by establishing consensus on regarding a successor to the killing of their Supreme Leader, Ayatollah Ali Khomeini—his son Mojtabah. As the initial shock fails to deliver decisive results, the tempo and scale of US and Israeli strikes, particularly against civilian infrastructure, have intensified. These have, in fact, further consolidated the regime while prompting a region-wide Iranian response. Despite significant opposition to the regime, recently and historically, it is arguable that such expanded attacks on civilian infrastructure will not lead to mass

mobilization against it in any immediate sense. Like others living under authoritarian regimes, publics can hold two positions at once in times of brutal external aggression.

We see reprisal in Iran's increasing retaliatory missile and drone strikes against Israeli territory and US bases and personnel across the Gulf. These exchanges have reinforced domestic solidarity within Iran, while contributing to growing unease about the war inside the United States as well as further eroding the already tenuous legitimacy claimed by Washington and Tel Aviv. They have also deepened the view among (so far) quiescent Arab publics that their governments are entrenched partners of Israel and support its strategies—a notion that seems counterfactual under current forms of local repression. The assumption that bombardment alone would weaken the regime appears, at least for now, misplaced and certainly miscalculated.

The consequences are not confined to Iran's internal cohesion. They reverberate across the Gulf and the global energy system. Disruption and obstruction around the Strait of Hormuz have already driven up global and local oil prices, with credible forecasts of far sharper spikes should the war intensify. Even the perception of sustained instability in this corridor—through which a significant share of the world's energy supply transits—introduces inflationary pressures into economies far beyond the region. And this is before any escalation by the Houthis, who have threatened to enter the war should Saudi Arabia do so, including by disrupting maritime traffic in the Red Sea, as they did during the genocide on Gaza, and potentially striking inside Saudi territory. Such developments would amplify global economic strain, compounding existing inflationary pressures.

At the same time, the Gulf states find themselves in an increasingly precarious position. While publicly condemning Iran, their leaders understand that hosting US bases, and not preventing strikes launched from their territory, makes them both partners and potential targets. Iranian retaliatory attacks on civilian facilities linked to US operations underscore that attacks launched from a territory on Iranian civilian facilities risk drawing equivalent responses. This has generated visible unease within Gulf societies, where populations watch their governments' security alignment with Washington and Israel collide with the material consequences of regional escalation. Thus, Iran's president's recent apology was not a renunciation of further strikes, but an acknowledgment that civilians have and will unnecessarily be harmed or even perish, in Bahrain, Qatar, Kuwait, the UAE, and beyond. In attempting to contain Iran, Washington may be transforming its own network of regional alliances and bases into a source of strategic liability.

Beyond regional instability, cost is another, slow-burning pressure point. For now, the daily financial burden of the war on the United States remains politically manageable. While this imperial war of choice, with massive consequences to life and resources in Iran, will not become unsustainable all at once, it will eventually cross a critical threshold. The cost of sustained air campaigns, naval operations, force deployments, munitions replenishment, and emergency aid packages add up quietly. The longer the conflict drags on without decisive strategic gains—always difficult to measure in the absence of clear goals—the more difficult it becomes to justify open-ended expenditures especially in a domestic climate already strained by unprecedented debt, inflationary pressures and fiscal deficits.

Israel faces a parallel dilemma. Its missile defense systems, including Iron Dome and more advanced intercept platforms, are extraordinarily expensive to operate at scale. These interceptors cost far more than many of the Iranian projectiles they are designed to destroy. Moreover, the entry of Hizballah into the war, or rather the response after months of Israel's aggression during a so-called cease-fire, has compounded the effect of this potential dearth. With its missiles and drones reaching cities like Tel Aviv and Haifa daily, Israel now has to fight on two fronts, both in the air and on the ground in south Lebanon, against a disciplined force thought to have been severely degraded. It apparently was not. In short engagements, this asymmetry is manageable. In prolonged exchanges, it becomes consequential and decisively unsustainable, not least given Iran's escalatory deployment of more advanced missiles. Depletion rates, resupply timelines, and financial sustainability begin to matter. Defensive success does not eliminate strategic strain; it can mask it—until it cannot.

Taken together, mounting financial costs, rising military expenditures, and the steady consumption of defensive inventories may ensure that this campaign of aggression goes into diminishing returns of a potentially massive scale that goes way beyond the Middle East. And it is precisely at that point—when regional escalation and mounting costs converge—that the war's broader geopolitical implications come into view. Here, Russia and China are not passive observers. From Moscow and Beijing, this conflict is not solely a regional confrontation. Rather, it is an indicator or a test of US endurance, alliance cohesion, fiscal elasticity, and on-field military prowess. Every week the war continues without a decisive resolution offers lessons about the durability and limits of US power projection as well as its status as a great(est) power.

There are other longer-term implications. For Russia, prolonged US entanglement in another costly theater may recalibrate calculations in Europe, particularly regarding the

balance of pressure across NATO's eastern flank. For China, the conflict underscores vulnerabilities in global energy chokepoints, US naval commitments, and the political strain that accompanies extended campaigns. Neither state needs to intervene directly to benefit from structural overstretch.

The stakes therefore extend beyond Tehran, Tel Aviv, and Washington. If the war accelerates fiscal strain, exposes the fragility of US-anchored security architectures in the Gulf, and erodes the perception of controlled escalation, it may hasten shifts already underway in the international system and may lead to a different *kind* of "multipolarity" than previously assumed.

Yet beyond strategy and great-power recalibration lies the more immediate reality of human devastation. Thousands of Iranian civilians have already paid the price of a war framed in the language of deterrence and necessity—and this comes on the heels of thousands who perished earlier in the year during anti-regime protests. Across the region—from southern Lebanon to the Gulf—ordinary people bear the consequences of decisions made in distant capitals. In Gaza, where mass death and destruction has already reshaped the moral landscape of this era, the expansion of war only deepens the sense that force has replaced restraint as a governing principle. This matters strategically as much as morally because states that normalize large-scale civilian harm may secure short-term gains, but they erode the legitimacy on which durable power depends.

None of the pressures outlined above guarantee a particular outcome. Iran could weaken. Key stockpiles and launchers could be severely hit. Escalation could spiral unpredictably while de-escalation remains possible, potentially based on a differing threshold of pain for Israel and the United States. But the assumption that this war would be short, controlled, and strategically clarifying already appears misplaced as well as precarious. For now, what is certain is the mounting toll on civilians across the region—and the growing possibility that a campaign meant to reinforce US and Israeli supremacy may instead mark another turning point in its decline.

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