



The Gulf, Iran and American grand strategy: why the decisive contest is over China

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To truly understand the situation in the Gulf, one must start further back—with the event that profoundly reshaped the regional balance: the Iranian Revolution of 1979 and the rise of the ayatollahs' regime. From that moment on, Iran was no longer merely a major Middle Eastern country; it became an ideological and geopolitical actor determined to redefine the balance of power across the entire region.

For a long time, the Western—and particularly European—mistake was to underestimate the nature of Iran's new leadership. The fall of the Shah, an ally of the United States, was seen by many as a simple shift in influence; in reality, it marked the emergence of a revolutionary force with its own expansionist vision, rooted both in ideology and in the long memory of the Persian Empire.

From the war with Iraq to the building of regional power

Saddam Hussein was quick to grasp the change. Seeing post-revolutionary Iran temporarily isolated and no longer supported by Washington as it had been under the Shah, Baghdad seized the opportunity to settle scores and attempt to take control of strategic, oil-rich areas. Thus began the long Iran-Iraq War.

At first, the conflict appeared to favor Iraq, thanks to the momentum of its armored forces. But Iran responded by drawing on strong national sentiment, enabling the regime to mobilize the population and avoid defeat. It failed to secure a decisive victory, but achieved two fundamental results: it survived and consolidated its domestic power.

The war, in fact, decimated the professional ranks of the Iranian army and air force, progressively reducing the prospect of any genuine alternative to clerical rule. From that point on, the ayatollahs' power expanded further, while Iran began to present itself as a regional power opposed to all the other Gulf states.



Monday, September 22, 1980: the Iran-Iraq War begins.

The American mistake in Iraq and Iran's advantage

A direct confrontation with the United States became inevitable. As early as 1987, during the so-called "Tanker War," Washington intervened to prevent Tehran from threatening the security of the Strait of Hormuz and international energy shipping. The Americans struck Iranian units and restored order in the area, reassuring the Sunni Gulf states.

That American presence, therefore, did not arise from abstract or gratuitous interference: above all, it was requested by the states of the region, which perceived the Iranian threat as tangible

and existential.

In the first Gulf War, George H. W. Bush dealt Saddam Hussein a severe blow but avoided overthrowing him, understanding that the regional balance required avoiding the complete destruction of Iraqi power. In the second Gulf War, however, the United States made a decisive strategic mistake: it invaded Iraq without a credible political and state-building plan for the post-Saddam era.

That vacuum facilitated Iranian penetration into a country with a large Shiite population. Later, during the war against ISIS, there was even a paradoxical convergence between Western and Iranian interests. But Tehran also exploited this phase to expand its influence.

This is where Iran's strategy becomes clear: building a power projection that, through Iraq, Syria and Lebanon, reaches the Mediterranean. The so-called "Shiite crescent" is not merely a journalistic label, but the cornerstone of a precise geopolitical design: gaining strategic depth, consolidating its hold over multiple theaters, and reducing its dependence on access to the Gulf alone and on the Strait of Hormuz.

Alongside this northern axis, Tehran has also sought to exert pressure southward and toward the Red Sea, in an attempt to encircle the Arabian Peninsula and influence regional maritime routes.



George Bush greets U.S. soldiers during the first Gulf War.

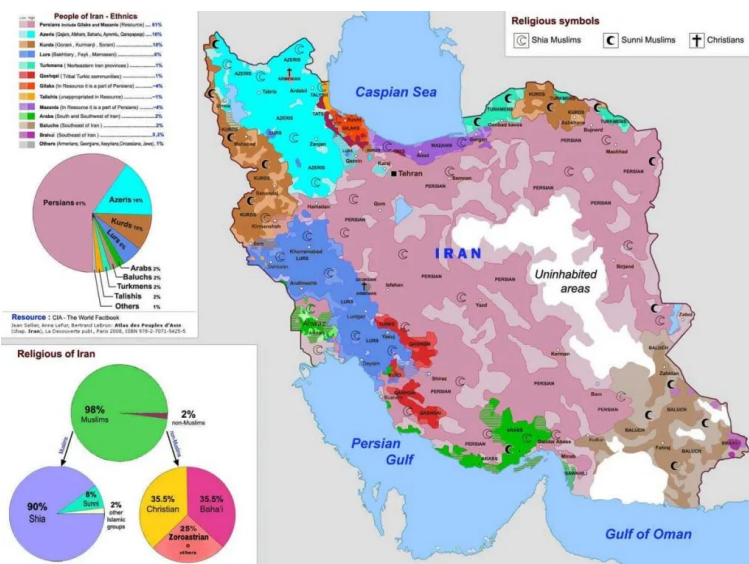
A regime strong abroad, fragile at home

Yet Iran is far from monolithic. It is a country of around 90 million people, with a complex ethnic makeup: Persians form the majority, but there are also large Azeri, Kurdish and Baloch minorities. Its population is also very young: a huge share of Iranians are under 30 and did not take part in the 1979 revolution.

Urbanization has further transformed society. In cities, especially among young people, social media and ties with the Iranian diaspora in Europe and the United States have opened channels of communication and engagement with the outside world. The diaspora, made up of millions of often well-integrated and affluent people, is a factor not to be underestimated in the country's future.

Real power, however, remains firmly in the hands of an organized minority. On one side is the religious establishment; on the other are the Pasdaran, which are not merely a military force, but a political-military and economic structure controlling vast sectors of the national economy. The system is completed by militias used for internal control and the suppression of dissent.

This configuration makes the regime difficult to bring down, but not invulnerable. Ethnic tensions, social fractures and youth discontent are all pressure points. Even the regular army, beyond its senior ranks, is largely made up of conscripts drawn from the very segment of the population that often protests against the regime.



Iran is a country of roughly 90 million people, with a complex ethnic makeup - Copyright Guide Of The World.

Why Iran's neighbors fear Tehran

The Gulf countries, starting with Saudi Arabia, feel deeply threatened by Iranian expansionism. Tehran's attacks, intimidation, and ability to act directly or through proxies have reinforced the conviction that American protection remains indispensable.

Israel must also be viewed within this context. Until a few decades ago, Israel's main adversary was the Sunni Arab world. Today, however, its primary strategic enemy is Iran. The Iranian regime's hostility toward Israel stems not only from ideological rhetoric, but also from a specific geopolitical need: to create an external enemy capable of legitimizing Iranian expansion in Syria and Lebanon while mobilizing domestic and regional support.

Alongside Israel, another competitor is Erdoğan's Turkey, an ambitious regional power playing on multiple fronts: it remains in NATO, maintains ties with Washington, but also deals pragmatically with the Arab world and other regional actors, pursuing its national interests.

Finally, the role of Azerbaijan and the Azerbaijani issue in Iran, as well as that of Iraqi Kurdistan, should not be overlooked. In the event of an internal Iranian crisis, both factors could become major sources of destabilization.



The Middle East is now marked by a dense network of strategic rivalries: Iran, Israel, Turkey, and the Gulf monarchies compete for influence and regional security.

The real objective: containing China

The crucial point, however, is another one. If the Gulf crisis is viewed solely as a regional confrontation or as yet another clash between the United States and Iran, the broader picture is missed. The real strategic significance of this contest lies in the competition between

Washington and Beijing.

The United States is no longer vitally dependent on the Gulf's energy resources. Its allies, both in the West and in Asia, have largely diversified their supply sources. Even potential war-induced shortages would be painful but manageable, involving higher costs but not enough to trigger a devastating energy shock for the global economy.

Moreover, the Arab Gulf states have taken steps to reduce their total dependence on the Strait of Hormuz by building oil and gas pipelines that terminate on the Arabian Sea and the Red Sea. This means that, while they would suffer damage in the event of conflict, they could at least partly offset it through higher international energy prices.

China, on the other hand, has much to lose. After difficulties on the Venezuelan front, Beijing remains heavily dependent on securing energy supplies from abroad at sustainable costs. If Iran were also to become a less accessible supplier or one subject to indirect American control, China's strategic vulnerability would increase considerably.

Russia, for its part, could even benefit from the situation, easing sanctions pressure and selling its oil more easily, especially to India. And Washington might tolerate this, because India is a regional competitor to China, not to the United States.



The Strait of Hormuz separates Iran and Oman and is one of the most strategic maritime chokepoints for the global oil trade.

From the Patti di Abramo to a new regional bloc

In this scenario, perceptions of Israel are also changing in the Gulf countries. Faced with the Iranian threat, the old enemy can become a partner. This is the deeper logic that has driven the Patti di Abramo: not merely diplomatic normalization, but an attempt to build an economic and strategic area in which Israel and the Gulf monarchies cooperate against Iran and, indirectly, against China.

Under the American plan, Iraq would also be brought into this system. It would be a useful solution both for stabilizing the region and for building a development and security network favorable to U.S. interests.

This is why the notion of a naive America devoid of strategic vision is superficial. On the contrary, the logic that emerges is that of a grand strategy aimed at striking the main global competitor with the least possible direct effort: containing China by targeting its fundamental weakness—energy.



The signing of the Patti di Abramo in 2020 marked the beginning of a new phase in relations between Israel and several Gulf monarchies, based on strategic, economic, and security cooperation.

War in the new domains

From a military standpoint, contemporary warfare is increasingly fought in the air, aerospace, cyber, and cognitive domains. The latter, in particular, is now as decisive as—if not more so than—kinetic confrontation.

Cognitive warfare makes it possible to appear victorious even when one has suffered severe blows on the ground or in the skies. In this field, Iran has developed an effective narrative:

portraying itself as the victim of external aggression, mobilizing anti-Western sentiment, and above all targeting Europe's weak point—its historical guilt, strategic disorientation, and tendency toward political paralysis.

The United States communicates more effectively with Gulf populations and Iranians, but far less so with European public opinion, which often appears incapable of interpreting the crisis in terms of power and interests.

Operationally, Iran has built up considerable missile and drone capabilities over the years, partly through external cooperation. Missiles and drones allow it to threaten U.S. bases, infrastructure, and neighboring countries—not necessarily to win in conventional terms, but to intimidate, destabilize, and deter more direct involvement by its adversaries.

Israel, by contrast, possesses overwhelming air and intelligence superiority, backed by substantial special operations and infiltration capabilities. The question is not whether Israel can strike Iran, but how far the United States intends to push the escalation.



The Shahed-136 drone: over the years, Iran has developed significant drone and missile capabilities, employed both directly and through allied actors in the region.

Regime change or controlled attrition?

Invading a country of 90 million people would be an enormously costly undertaking. For this reason, if the ultimate objective were truly regime change, the most plausible path would not be direct occupation, but the exploitation of Iran's internal contradictions.

From this perspective, the armed core of a possible transformation could consist of two elements: on one side, parts of the regular army, made up of conscripts and therefore of young people often hostile to the regime; on the other, ethnic minorities, particularly Kurds, Azeris, and Baloch. If any internal change involved the military, it would at least partly avoid the chaos that followed the fall of the Iraqi regime.

Who, then, are the first victims of this cognitive war? On one side are European countries, often lacking strategic vision and with public opinions easily frightened or manipulated. On the other are Iran's more ideological and fanatical masses, sustained by a narrative that convinces them they are protagonists of a heroic resistance, while in reality they support a regime that is impoverishing them ever further.

This is the paradox: in terms of perception, one can emerge as a winner even when, in material terms, one has been hit hard. And without a clear strategic understanding, Europe once again risks remaining a passive spectator in a contest that is redefining global balances.

Ultimately, the message is simple: this is not a local crisis, but a move of systemic significance. Far more than Iran's future or Israel's security is at stake in the Gulf. A significant part of the confrontation between the United States and China is being played out there. And while others move pieces on the chessboard, Europe continues to sleep.