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GEOPOLITICAL CHANGES IN THE MIDDLE EAST AND THE PERSIAN GULF FOLLOWING THE UNITED STATES–ISRAEL WAR AGAINST IRAN

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The United States–Israel war against Iran (the 12-Day War of February 2026) fundamentally altered the international and geopolitical landscape of the Middle East and the Persian Gulf region. Despite the significant damage inflicted on Iran, the military campaign failed to achieve one of its principal objectives—the overthrow of the Iranian political regime. The strategic calculations of the United States and Israel proved inaccurate, as they underestimated the considerable ideological resilience embedded within Iran’s political and state institutions, the core of which is constituted by Islamic ideology. Iran remains a major regional power owing to its extensive network of political and strategic influence across several Middle Eastern countries, including Gaza, Lebanon, Yemen, Iraq, and Syria. Consequently, any military confrontation with Iran could not be confined solely to Iranian territory but inevitably extended to a broader regional dimension involving multiple arenas of influence and proxy actors.

Keywords: *geopolitical transformations; Middle East; Persian Gulf; United States–Israel war against Iran; ideological factor; regional confrontation; Strait of Hormuz.*

Following the military attack launched by the United States and Israel against Iran in February 2026, the international situation underwent significant transformations not only in the Middle East but also on a global scale. The conflict accelerated a substantial redistribution of spheres of influence within the region and initiated a reassessment of security and

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defense policies across numerous states of the Middle East and the Persian Gulf. These developments directly affected the international standing of the countries involved in the conflict and contributed to a reassessment of their military and political capabilities within the international community.

The primary objective of this study is to examine and compare the geopolitical realities that existed before and after the outbreak of the war. It is evident that all parties involved suffered various forms of damage as a consequence of the conflict initiated by the United States and Israel. Nevertheless, each side has subsequently claimed victory. This raises important questions regarding the extent to which such claims correspond to the actual balance of power in the region, which actors succeeded in strengthening their strategic positions, and which experienced a decline in their regional influence.

Particular attention is devoted to assessing the reputational and political costs incurred by the principal actors, as well as identifying those states that demonstrated greater effectiveness in pursuing their strategic objectives under the changing regional circumstances.

It is also necessary to take into account that the conflict has not yet reached a definitive conclusion. Although periods of ceasefire have been declared, they remain fragile and are frequently violated by the parties involved. As a result, the regional security environment continues to be characterized by a high degree of uncertainty and instability.

With regard to relations between Iran, the United States, and Israel, it can be observed that since the Islamic Revolution of 1979, interactions between these actors have remained highly confrontational. Hostility has manifested itself through extensive economic sanctions and various restrictions imposed on the Iranian economy, as well as through political and diplomatic pressure.

At various stages, the confrontation between Iran and Israel has also been expressed through the activities of Iranian-aligned proxy groups operating in the Gaza Strip, Lebanon, and Yemen, as well as through Israeli military operations targeting members of Iran's political leadership, scientific community, and military establishment. These developments

demonstrate the existence of a long-standing conflict that has persisted for decades, periodically escalating into direct military confrontation while at other times remaining in a latent but enduring state of tension.

If the influence of the principal actors—namely the United States, Israel, and Iran—is compared before and after the war in the Middle East and the Persian Gulf, it is possible to identify a number of significant shifts in the regional balance of power.

Assessments of the conflict's consequences remain highly contested. Numerous, and often contradictory, interpretations have emerged regarding which side succeeded in strengthening its regional position and which experienced a decline in influence following the war. Such divergent evaluations reflect the complexity of measuring geopolitical influence in a region characterized by overlapping security, political, and ideological dynamics.

The United States, which maintains the largest network of military installations in the Middle East and the Persian Gulf, operates approximately nineteen military facilities in the region, including around eight major permanent bases. The concentration of American military assets is particularly significant in the Persian Gulf area². Prior to the most recent conflict with Iran, the United States was widely regarded as the dominant external power in the region. Its position was substantially reinforced following the 2003 intervention in Iraq, which demonstrated Washington's ability to project military power and reshape regional political realities. This contributed to the perception of the United States as the principal security actor and a decisive force in regional affairs.

Israel has increasingly sought to establish itself as a key center of influence in regional security affairs. Pursuing ambitious strategic objectives and emphasizing the need to contain Iran, Israel has expanded its political and military influence across several neighboring states, thereby contributing to significant changes in the existing regional status quo. Israel has established control over portions of territory in Syria and Lebanon, as

² *Al Jazeera* (2025).

well as the Gaza Strip³, which Israeli policymakers have described as components of a broader strategic security zone. According to official Israeli security doctrine, the retention of influence and military presence in these areas is considered essential to the country's national security interests.

At the outset of the conflict, both Israel and the United States appeared to anticipate a relatively short military campaign. According to numerous political assessments and regional analyses, one of the principal strategic objectives was to facilitate a transformation of the Iranian political system through a combination of external military pressure and internal political destabilization. It was expected that such pressures could encourage large-scale domestic unrest and potentially generate conditions conducive to a broader anti-government movement within Iran.

Despite the significant scale of the military campaign, the United States and Israel failed to achieve their presumed objective of bringing about the collapse of the Iranian political system. Although the damage inflicted on Iran was substantial and a number of senior state officials, military commanders, and political figures were killed during the initial stages of the conflict, the anticipated political destabilization of the country did not occur.

One of the principal reasons for this outcome was the resilience of Iran's ideological and institutional framework. The strategic calculations of the United States and Israel appear to have underestimated the importance of the ideological foundations underpinning the Iranian state. Islamic ideology continues to serve as a central source of political legitimacy and institutional cohesion within the Islamic Republic, contributing significantly to the stability of its governing structures during periods of crisis.

In this context, ideological commitment functioned as an important stabilizing factor for the Iranian political system. The Assembly of Experts,

³ Al Jazeera English (2026).

composed of eighty-eight senior religious members⁴, rapidly initiated the constitutional succession process and selected a successor to the position of Supreme Leader. Following the death of Ali Khamenei in March 2026, his son, Mojtaba Khamenei, was appointed and confirmed as the new Supreme Leader of Iran⁵. Under his leadership, Iran adopted an even more uncompromising position toward both the United States and Israel.

Domestic institutional mechanisms also played a significant role in maintaining the continuity of governance during the conflict. In particular, the Islamic Revolutionary Guard Corps⁶ (IRGC) had developed procedures designed to ensure the uninterrupted transfer of authority in the event of the elimination of senior commanders. These mechanisms provided for the delegation of responsibilities to multiple deputies and successors, thereby reducing the vulnerability of the military and political leadership to targeted attacks. As a result, attempts to disrupt or decapitate the Iranian command structure proved largely ineffective, while losses within the leadership were rapidly compensated through established succession procedures.

At the same time, Iran did not limit its actions to defensive operations. It also conducted retaliatory military strikes against Israel and against United States military facilities located across various parts of the Middle East and the Persian Gulf region.

Iran remains a major regional power due to its extensive political, ideological, and strategic networks across several Middle Eastern territories and states, including Gaza, Lebanon, Yemen, Iraq, and Syria⁷. Consequently, any military confrontation involving Iran could not be

⁴ Press TV (2024)

⁵ *The Guardian* (2026).

⁶ The Islamic Revolutionary Guard Corps (IRGC) is an elite military-political institution of the Islamic Republic of Iran, established in 1979 following the Islamic Revolution on the initiative of Ruhollah Khomeini. The IRGC operates under the direct authority of the Supreme Leader of Iran and functions alongside the country's regular armed forces, serving as a parallel military structure with distinct responsibilities in national defense, internal security, and the protection of the Islamic Republic's political system.

⁷ The IRGC has also played a central role in developing and supporting a network of allied non-state actors and proxy forces across the Middle East, including Hamas in Gaza, Hezbollah in Lebanon, the Houthi Movement in Yemen, various Shiite armed groups in Iraq, and pro-Iranian militias operating in Syria. Through these relationships, the IRGC has significantly expanded Iran's regional influence and strategic depth, making it a key instrument of Tehran's foreign and security policy.

confined solely to Iranian territory. The conflict quickly acquired a broader regional dimension, affecting multiple arenas throughout the Middle East.

Furthermore, the war had important implications for global energy markets. Disruptions to maritime transportation through the Strait of Hormuz, one of the world's most strategically significant energy transit corridors, affected the export of oil and natural gas from the Persian Gulf. These disruptions contributed to instability in international energy markets and intensified concerns regarding global energy security.

Faced with what Iranian authorities characterized as an existential threat to the survival of the state, Iran responded on the second day of the war by initiating restrictions on navigation through the Strait of Hormuz⁸, a situation that continued for several months. In addition, Iran launched missile strikes against United States military facilities located in six countries across the region—Bahrain, Kuwait, Saudi Arabia, Iraq, Qatar, and the United Arab Emirates—alongside large-scale missile attacks directed at Israeli territory⁹.

From this perspective, the war represented a significant strategic setback for both the United States and Israel. Their efforts to weaken the Iranian political system and induce regime collapse failed to achieve the intended objectives. At the same time, Iranian retaliatory actions resulted in extensive damage to a number of United States military installations throughout the Middle East and the Persian Gulf, generating substantial reputational costs for American influence and credibility in the region.

Prior to the conflict, the presence of United States military bases in Middle Eastern and Gulf countries was widely perceived as a source of security guarantees and regional stability. However, the events of the war prompted a reassessment of this assumption among many regional actors.

⁸ The Strait of Hormuz is one of the world's most strategically significant maritime chokepoints, linking the Persian Gulf with the Gulf of Oman and the Indian Ocean. The northern coastline of the strait is controlled by Iran, while its southern shores are bordered by Oman and the United Arab Emirates. Owing to its geographic position, the Strait of Hormuz serves as a critical transit corridor for global energy exports and plays a pivotal role in international trade and maritime security. U.S. Energy Information Administration (EIA) (2019).

⁹ Reuters reported subsequent Iranian strikes against United States military and strategic facilities in the region, *GMA Network* (2024).

Policymakers increasingly questioned whether the deployment of foreign military bases necessarily enhanced national security or, alternatively, increased vulnerability by turning host countries into potential targets during periods of military confrontation.

The effectiveness of existing security arrangements also became a subject of debate. Critics argued that neither the extensive network of American military installations nor the advanced weapons systems supplied to regional partners provided a fully effective response to Iranian missile and drone attacks. Consequently, the conflict intensified discussions regarding the reliability of existing defense architectures and the future direction of regional security cooperation.

This issue acquired additional significance in light of long-standing military procurement agreements between the United States and its regional partners. For decades, Washington has remained the principal supplier of advanced military equipment to several Gulf states. Nevertheless, the conflict generated renewed scrutiny concerning the operational effectiveness of these defense systems under wartime conditions.

Former and current U.S. President Donald Trump repeatedly emphasized the economic and strategic importance of American arms exports to Middle Eastern allies, particularly Saudi Arabia. During his visit to Riyadh in May 2017, the United States and Saudi Arabia announced a defense cooperation package valued at approximately USD 110 billion in immediate purchases, with the potential to expand to as much as USD 350 billion over a ten-year period. These agreements were presented as a cornerstone of the long-term security partnership between Washington and its regional allies¹⁰.

At the same time, during Donald Trump's presidency, substantial arms procurement agreements were concluded between the United States and several states of the region. Major defense contracts included approximately USD 23 billion in arms sales to the United Arab Emirates,

¹⁰ CBS NEWS (2017).

USD 12 billion to Qatar, more than USD 10 billion to Kuwait, and additional multi-billion-dollar agreements with Bahrain¹¹.

However, the conflict raised important questions regarding the practical effectiveness of these extensive military investments. Despite defense contracts valued at tens and, in some cases, hundreds of billions of dollars, the security architecture established around United States military partnerships did not fully prevent regional allies from becoming vulnerable to military retaliation during the conflict. The six states that experienced Iranian retaliatory strikes during the twelve-day war subsequently began reassessing the foundations of their national security strategies and existing defense arrangements.

Iran, for its part, advanced the argument that sustainable regional security would require the gradual removal of foreign military bases from the Persian Gulf region. According to Iranian officials and strategic commentators, the continued presence of United States military facilities increases the likelihood that host countries may become involved in future regional confrontations.

Particularly complex challenges emerged for Saudi Arabia, the United Arab Emirates, and Qatar. The conflict not only disrupted the pre-existing balance of power between the United States and Iran but also negatively affected the economic and financial interests of these states. The United Arab Emirates experienced pressures on its role as a leading regional financial and commercial hub, while Saudi Arabia and Qatar encountered growing difficulties in maintaining uninterrupted exports of energy resources to international markets and fulfilling long-term contractual obligations.

These challenges were closely linked to continuing disruptions in maritime transportation through the Strait of Hormuz. Whether through restrictions on navigation or reduced shipping capacity, the situation in the Strait significantly affected regional trade flows and energy exports,

¹¹ Ibid.

thereby increasing economic uncertainty throughout the Persian Gulf region.

The growing sense of insecurity among regional states has been reflected in rising defense expenditures and an active search for additional security guarantees beyond the traditional framework of cooperation with the United States. As a result, several Gulf countries have intensified their political, economic, and security engagements with other major powers, including China, Turkey, India, and Russia.

Consequently, confidence in the ability of the United States to act as the sole guarantor of regional stability has been increasingly questioned. These developments have contributed to a broader transformation of the regional order and have accelerated the gradual emergence of a more multipolar geopolitical structure in the Middle East.

In this evolving environment, regional actors are increasingly pursuing diversified foreign policy and security strategies aimed at reducing dependence on any single external power.

Although the United States remains the most powerful military actor in the Middle East, it can no longer be regarded as the region's sole center of political influence. The post-war environment has been characterized by the growing diversification of power centers and the emergence of a more complex regional order. In particular, China's economic influence has continued to expand through increased investment activity, infrastructure projects, and the development of long-term energy cooperation agreements with states across the Middle East and the Persian Gulf.

At the same time, Russia has strengthened its position as an important diplomatic intermediary whose role is viewed positively by both Iranian authorities and a number of other regional actors. Despite facing resource constraints, Russia has maintained a degree of regional influence through its military presence in Syria and through long-standing military-political relationships with several Middle Eastern states.

The conflict has also contributed to the growing strategic significance of Turkey. Following the war, Turkey's role as a reliable transit corridor for energy exports to Europe has become increasingly important, while its

position as a regional transportation and energy hub has continued to strengthen. These developments have enhanced Ankara's geopolitical relevance both within the Middle East and in broader Eurasian energy networks.

Turkey refrained from supporting any potential ground operations against Iran. This position was shaped, in part, by growing tensions between Ankara and Tel Aviv. Israeli political and security officials have repeatedly criticized the foreign policy pursued by the government of President Recep Tayyip Erdoğan, arguing that Turkey has adopted an increasingly confrontational approach toward Israel¹² and has supported political movements and non-state actors whose activities are perceived by Israel as detrimental to its national security interests.

At the same time, Turkey has sought to maintain a policy of strategic balancing among Western states, the Arab world, and Iran. This multidimensional diplomatic approach has strengthened Turkey's role as both an intermediary and an increasingly autonomous center of power within the regional system.

The international and regional position of Israel following the war with Iran remains the subject of considerable debate. While Israel achieved a number of military successes in Gaza and Lebanon, many analysts argue that the principal strategic objectives associated with the confrontation with Iran were not fully realized. As a result, assessments of Israel's overall gains from the conflict remain mixed.

The conflict also generated renewed discussions regarding the effectiveness of Israel's multilayered air and missile defense architecture, including the Iron Dome system¹³ and other complementary defense components. Iranian retaliatory strikes demonstrated that even highly sophisticated missile defense networks face significant challenges when

¹² Anadolu Ajansi (2024).

¹³ The term "Iron Dome" is frequently used in the media as a generic reference to Israel's entire missile defense architecture. Technically, however, the Iron Dome system is designed primarily to intercept short-range rockets, artillery shells, and mortar rounds. It constitutes only one component of Israel's multi-layered air and missile defense network, which also includes systems intended to counter medium-range, long-range, and ballistic missile threats.

confronted with large-scale and technologically advanced attacks. Consequently, the war highlighted both the strengths and the limitations of contemporary air defense systems under conditions of sustained military confrontation.

Unlike many of Israel's previous adversaries, Iran possesses a comparatively advanced military-industrial and technological base, including indigenous missile, drone, and aerospace capabilities. The conflict therefore represented a qualitatively different challenge for Israeli defense planners and provided important insights into the evolving nature of regional military competition and strategic deterrence in the Middle East.

Israel's strategic position was also constrained by structural geographic factors. In contrast to Iran, which possesses a vast territory, a large population, and substantial natural resources, Israel's limited territorial depth increases its vulnerability to sustained military pressure and large-scale missile attacks. This asymmetry has long been recognized as an important factor shaping the security calculations of both states.

The conflict further demonstrated the challenges associated with maintaining prolonged high-intensity military operations. According to numerous assessments, both the United States and Israel experienced a significant depletion of precision-guided munitions and air-defense interceptors during the course of the war. Replenishing these systems proved difficult in the short term because of the complexity of production processes, industrial limitations, and the high costs associated with advanced military technologies.

These developments highlighted an important dimension of contemporary warfare: the growing significance of cost asymmetry between offensive and defensive systems. The relatively high cost of advanced missile-defense interceptors and precision-guided weapons contrasted sharply with the comparatively lower cost of many missile and drone systems employed by Iran. As a result, the long-term sustainability of military operations became an increasingly important factor in determining the effectiveness of each side's war effort.

From the perspective of strategic endurance and resource mobilization, the conflict suggested that the ability to sustain a prolonged confrontation may be as important as achieving initial military successes. In this regard, the war generated considerable debate among analysts concerning the comparative capacity of the United States, Israel, and Iran to maintain long-term military operations under conditions of resource attrition.

Another significant consequence of the conflict was the increased strategic importance of the Strait of Hormuz. Iran employed restrictions on maritime navigation as an instrument of political and economic leverage, thereby affecting the flow of energy resources from the Persian Gulf to international markets. These developments contributed to heightened volatility in global energy markets and increased uncertainty regarding the stability of international supply chains.

As a result, global oil prices remained elevated for an extended period, while maritime transportation became considerably more complex and costly. Given that a substantial share of internationally traded oil and liquefied natural gas 20-25% passes through the Strait of Hormuz¹⁴, disruptions in this corridor had repercussions far beyond the Middle East, affecting both energy-importing and energy-exporting economies worldwide.

In response to these challenges, increasing attention has been devoted to the development of alternative energy transportation routes. However, efforts to diversify export corridors are complicated by the continuing instability of the regional security environment. Under these circumstances, the strategic importance of alternative transit pathways may increase significantly. In particular, Saudi Arabia and Egypt could assume a more prominent role as potential land-based and multimodal transit routes linking Middle Eastern energy producers with European markets. At the same time, the geopolitical and economic significance of the Red Sea and the Eastern Mediterranean is likely to grow as states seek to reduce

¹⁴ U.S. Energy Information Administration (EIA) (2019).

dependence on vulnerable maritime chokepoints and enhance the resilience of global energy supply networks.

Returning to the central question of this study—namely, how Iran has influenced the changing geopolitical environment of the Middle East and the Persian Gulf—it is possible to conclude that Iran has demonstrated a considerable capacity to withstand external political and military pressure from both the United States and Israel. One of the principal factors contributing to this resilience appears to be the strong ideological foundation embedded within the political institutions of the Islamic Republic.

The Iranian case suggests that ideological cohesion can serve as an important source of political legitimacy, institutional continuity, and strategic endurance during periods of external confrontation. From this perspective, ideology functions not only as a system of beliefs but also as a mechanism for mobilizing political support, maintaining elite cohesion, and preserving state stability under crisis conditions.

Comparative experience demonstrates that states possessing strong ideological foundations often respond differently to external pressure than states whose governing elites are primarily motivated by pragmatic political or economic considerations. In such cases, decision-making processes may be influenced not only by calculations of material costs and benefits but also by ideological commitments, historical narratives, and perceptions of national identity and sovereignty.

The events of the conflict demonstrated that even significant military losses and the elimination of senior political and military figures did not fundamentally alter the strategic position of the Iranian leadership. On the contrary, Iranian authorities continued to emphasize the protection of national sovereignty and resistance to external pressure as core principles of state policy. The continuation of negotiations between the United States and Iran over an extended period further indicates that neither side has been able to impose a unilateral political settlement, while Iran has continued to pursue its strategic objectives within the framework of its declared national interests.

Historically, USA major powers have often encountered difficulties when attempting to influence states whose political systems are strongly shaped by ideological doctrines, whether based on religious, nationalist, or other forms of political ideology. Such systems frequently display a higher degree of resistance to external pressure because their leaderships derive legitimacy not solely from economic performance or political expediency but also from broader ideological principles and societal narratives.

In contrast, the behavior of political elites motivated primarily by material or economic interests may be more predictable within traditional frameworks of international relations. Ideologically driven leaderships, however, often operate according to different strategic calculations, making their responses more difficult to anticipate and assess through conventional political models.

If Iran succeeds in maintaining its political cohesion, safeguarding its sovereignty, and continuing the development of its economic, technological, and military-industrial capabilities, it is likely to strengthen its position as one of the leading powers of the broader Middle East. Under such circumstances, Iran may emerge as an increasingly influential actor in the evolving multipolar international order and play a more significant role in shaping the future geopolitical architecture of the region.

**ՄԵՐԶԱՎՈՐ ԱՐԵՎԵԼՔՈՒՄ ԵՎ ՊԱՐՄԻՑ ԾՈՑՈՒՄ
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Աշոտ Կարապետյան¹⁵

Իրանի դեմ ԱՄՆ-ի և Իսրայելի սանձազերծած պատերազմը (12-օրյա, 2026թ. փետրվար) կտրուկ փոխեց միջազգային և աշխարհաքաղաքական իրավիճակը Մերձավոր Արևելքում և Պարսից ծոցում: Թեև Իրանին հասցված վնասի չափերը զգալի էին, սակայն նրանց չհաջողվեց տապալել երկրում տիրող վարչակարգը: Փաստորեն, ԱՄՆ-ի ու Իսրայելի

¹⁵ Աշոտ Կարապետյանը ԵՊՀ միջազգային հարաբերությունների ֆակուլտետի միջազգային հարաբերությունների և դիվանագիտության ամբիոնի դոցենտ է, պ.գ.թ., էլ. փոստ՝ ashotkarapetyan@ysu.am, ORCID <https://orcid.org/0009-0000-1374-4779>

հաշվարկը ձախողվեց, քանի որ նրանք թերագնահատել էին Իրանի իշխանական կառույցների հսկայական գաղափարախոսական ներուժը, որի առանցքում իսլամական գաղափարախոսությունն է: Իրանը հզոր տարածաշրջանային տերություն է, քանի որ ունի իր ազդեցության գոտիները Մերձավոր Արևելքի բազմաթիվ երկրներում (Գազա, Լիբանան, Եմեն, Իրաք, Սիրիա) և նրա դեմ պատերազմը չէր կարող սահմանափակվել միայն Իրանի տարածքով:

Բանալի բաներ՝ աշխարհաքաղաքական փոփոխություններ, Մերձավոր Արևելք, Պարսից ծոց, Իրանի դեմ ԱՄՆ-ի և Իսրայելի պատերազմ, գաղափարախոսական գործոն, դիմակայություն, Հորմուզի նեղուց:

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