

The Fragile Agreement: From a Nuclear Dispute to a Wider Strategic Confrontation

A strategic analysis of the post-war Gulf landscape, Iran's regional role, Hormuz security, reconstruction challenges, and global energy stability.

ABU DHABI , ABU DHABI, SHARJAH, DUBAI, UNITED ARAB EMIRATES, May 25, 2026 /EINPresswire.com/ -- The dispute between Iran and its regional and international surroundings has never been as complex as it is today. Before the war, the conflict revolved around the nuclear file — a

technical-political dossier that could

be managed through defined arrangements, inspection mechanisms, timelines, and phased sanctions relief. Despite recurring tensions, the disagreement remained contained within a negotiable framework, one that could be managed through diplomatic channels or calibrated economic pressure. But the recent war did more than alter the nature of the dispute; it reshaped the environment in which the dispute itself is managed, expanding its scope to include issues that were never part of the negotiating table. This is what makes any new agreement inherently fragile: it attempts to address a reality far more complicated than the one that existed before the war.

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This is no longer a nuclear agreement. It is an attempt to build stability on a region where the war has ended militarily, but not strategically.”

*H.E. Dr. Abdulla Belhaif
AlNuaimi*



From a Nuclear Dispute to a Wider Strategic Confrontation

The conflict has shifted from a nuclear file to an interlocking web of regional confrontations. Today, the question is no longer whether Iran will accept limits on its nuclear program. The real question is how to restrain a

state whose military and political influence now extends across Iraq, Syria, Lebanon, and Yemen. How can the security of maritime routes in the Gulf be guaranteed after the war demonstrated that the Strait of Hormuz can turn into a global chokepoint within hours? And how can any agreement separate Iran's missile and drone capabilities from the broader political settlement, when the war proved these capabilities are now central to Tehran's deterrence posture? These

questions were not on the table before the war, and this is why any agreement today is fragile: it seeks to resolve the consequences of a war that did not end, and conflicts that remain open, and balances of power that have not yet settled.

One of the most profound shifts produced by the war is the transformation of the Gulf's perception of Iran. Before the conflict, levels of trust varied from one Gulf state to another. There were open channels, spaces for dialogue, and differing approaches to dealing with Tehran. The war overturned this landscape entirely. Attacks on critical infrastructure, threats to navigation in the Strait of Hormuz, the targeting of vessels and vital facilities, and escalations that reached states not party to the conflict all led Gulf countries to a shared conclusion: the Iranian system is not trustworthy, and any agreement with it will remain fragile unless its regional behavior changes fundamentally. This shift will deepen Iran's isolation from its Arab neighbor and make any future rapprochement slower, more conditional, and far more difficult, because the trust that was lost was not merely political — it was strategic, economic, and security-related.

This fragility is further exposed by Iran's renewed assertions regarding "expanded control" over locations inside the United Arab Emirates — claims that carry no legal, historical, or political foundation. These statements are not isolated; they form part of a broader Iranian strategy to reshape the post-war landscape, test Gulf reactions, and manufacture negotiating leverage where none exists. Yet such rhetoric only deepens Iran's regional isolation, especially at a moment when Gulf states have reached an unprecedented consensus that trust in the Iranian system has collapsed. By attempting to impose new realities through unilateral claims, Tehran reinforces the very instability that makes any future agreement fragile, and signals that it still approaches regional politics through coercion rather than lawful engagement.

In this environment, the current truce appears more like a tactical pause than the end of a war. It is a truce imposed by necessity, not conviction. The United States seeks a calm that prevents another explosion in the Gulf. Iran seeks recognition of its regional role and its claimed authority over Hormuz. Gulf states seek stability that prevents a repeat of attacks on their vital facilities. Europe wants to protect its energy supplies. China wants uninterrupted trade routes. These divergent interests make the agreement vulnerable to collapse at the first real test, because each party enters it with different calculations that do not align with those of the others.

The fragility of the agreement becomes even clearer when we consider the reconstruction file — a politically and economically heavy burden. The war left extensive destruction across Iran's infrastructure, oil facilities, ports, power networks, and industrial zones. Preliminary estimates, based on comparable cases, suggest that reconstruction may exceed 250 to 300 billion dollars over the next decade. But the central question remains: who will pay? Iran lacks the financial capacity. The United States will not fund the reconstruction of its adversary. Gulf states will not invest in a country they no longer trust. China and Europe will not commit funds without political and security guarantees. Thus, reconstruction becomes part of the agreement's fragility, adding an economic burden no party is willing to shoulder, and rendering any political settlement incomplete unless accompanied by a clear economic framework.

The picture grows even more complicated when we consider Iran's attempt to link reconstruction to imposing fees on vessels transiting the Strait of Hormuz. Although such a proposal lacks legal grounding under international maritime law, Tehran views it as one of the few available options to finance the post-war phase in the absence of external support. Yet this approach, if pursued, would deepen Iran's isolation, place it in direct confrontation with Gulf states and the international community, and transform the strait from a neutral global passage into an instrument of economic coercion. Reconstruction thus becomes not only a financial burden but an additional factor threatening any political agreement, opening the door to a new conflict over freedom of navigation and the legitimacy of controlling one of the world's most critical maritime corridors.

Understanding the fragility of the agreement also requires examining how the war reshaped perceptions of the United States. The conflict did not only change Iran; it altered Washington's image among its allies and rivals. Europe will ask whether the United States can still be relied upon as a guarantor of stability, or whether it has become a partner that pulls the continent into crises it does not want. China will read the war differently: is Washington a dependable economic partner, or a power capable of disrupting trade and energy routes at moments of tension? The Middle East will reassess its relationship with the United States on the basis of whether it remains a partner for peace or merely a partner for crisis management. These questions will influence alliances, investment flows, and America's position in the international system.

Energy markets offer the clearest mirror of this fragility. The war demonstrated that energy security is no longer tied solely to production, but to maritime routes, political stability, and the ability of states to protect their critical infrastructure. Markets experienced sharp volatility during the conflict, driven not only by supply concerns but by fear of disruption. This sensitivity becomes even more evident when recalling earlier regional experiences, such as the prolonged slowdown in production at Qatar's North Field — the largest gas field in the world — which caused significant disturbances in LNG supplies to Europe and Asia, raised prices, and forced many countries to renegotiate contracts. If a technical issue or a boundary dispute can shake global markets to that extent, then a fragile political agreement in the Gulf after a major war will leave markets in a constant state of tension. Any minor incident in Hormuz or limited escalation in the region could push prices sharply upward, reaffirming that global energy security remains hostage to Gulf stability, and that alternatives — however expanded — have not yet reached the level required to guarantee lasting stability.

In the end, the agreement being discussed today is not a nuclear agreement. It is a post-war agreement — one that must address regional influence, maritime security, the future of the Strait of Hormuz, missile capabilities, reconstruction, Gulf trust, America's global image, and the balance of energy markets. This is what makes it fragile: it seeks to conclude a conflict that has not ended, and to build stability on ground that has not yet settled.

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