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The Decapitation That Failed: Iran's Gulf Gamble and Europe's Fracturing Consensus



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After ten days of the U.S./Israeli war on Iran, Washington's and Jerusalem's apparent gamble [has failed](#): the decapitation strike that killed Iran's Supreme Leader, Ayatollah Ali Khamenei, has not led to a regime change or Iran's "unconditional surrender" as [demanded](#) by the U.S. President. Iran continues to resist militarily and has elected a new supreme leader – the slain Khamenei's son, Mojtaba – and he is a [hardliner](#) with close ties to the Islamic Revolutionary Guards Corps (IRGC), the regime's elite force.

The [expanding theatre](#) of the war – now involving, in one way or another, around a dozen countries – has solidified two distinct strategic realities.

The first is Tehran's weaponization of the regional stability against the U.S./Israel tandem. The second is the deepening fissure within Europe, where leaders are caught between pandering to Trump and the reality of economic and security threats they can ill afford.

Iran's Gamble: Turning Neighbors into Leverage

Iran's military strategy reveals a clear, if high-stakes, political objective. It consists in "regionalizing" the conflict in the Middle East. President Masoud Pezeshkian's issue of [an apology](#) to the Gulf Arab states for strikes on their territories was an acknowledgment of the diplomatic cost of the strategy. But President Donald Trump's interpretation of the apology as an admission of defeat, and his use of [threatening and humiliating language](#) in reaction annulled [emerging progress](#) towards a ceasefire promoted by the Gulf states.

Since then, Tehran has intensified pressure on those states. On March 10, the strategy yielded a significant tactical success. According to Bloomberg, the UAE's largest oil refinery, the Ruwais facility—responsible for supplying its domestic fuel needs—was forced to [halt operations](#)

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following a drone strike and subsequent fire. The attack underscored that no asset in the Gulf is beyond Tehran's reach.

Simultaneously, the [paralysis](#) of the Strait of Hormuz has triggered a supply-side shock of historic proportions. Saudi Arabia, Iraq, the UAE, and Kuwait—four of the region's largest producers—have been forced to [slash their collective crude output](#) by as much as 6.7 million barrels a day as tankers refuse to transit Hormuz.

Tehran's calculus is not military defeat of the U.S., but to demonstrate that the cost of hosting U.S. assets outweighs the benefit of an American security presence.

The U.S. strategy seems to be inadvertently validating Tehran's case. In previous Gulf wars Washington was careful to keep Israel at bay, to avoid any perception of those wars as Israeli-Arab, or even Israeli-Muslim wars. That made it more palatable politically for Gulf Arab states to join the U.S. campaigns.

Now, however, Israel is not only bombing Iran alongside the U.S. but is widely perceived as driving the war. While the Gulf monarchies have long seen Tehran as a destabilizing force, at least some of them now appear to view Israel as a bigger threat.

Nor does it help Washington's cause that influential Americans, such as Senator Lindsey Graham (R-SC), a key Trump ally, now appear to be threatening Saudi Arabia with [unspecified "consequences"](#) if Riyadh fails to join in a war it urged Washington not to start.

Any weakening of America's Gulf alliances plays strategically into Tehran's hands. However, Iran's gamble is risky: in the case of a prolonged war, the Gulf states could, reluctantly, conclude that they have no choice but to join ranks with the U.S. and Israel to defeat the Iranian regime.

Europe's Discomfort: The Unnecessary War

As the missiles fly over the Gulf, a different kind of conflict is unfolding in European capitals. The war has exposed divisions among European leaders that further hobble Europe's capacity to act with strategic autonomy, in pursuit of its own interests.

Some, notably the German Chancellor, Friedrich Merz, and his compatriot, the President of the European Commission, [Ursula von der Leyen](#), have been strong in their support for the U.S./Israeli attack.

At the other end of the spectrum has been the Spanish Prime-Minister, Pedro Sanchez, who [denounced](#) the war as a violation of international law and refused permission for the U.S. to use military bases in Spain.

While the default narrative in most European capitals remains solidarity with Washington, the reality on the ground is forcing a painful reassessment. An increasing number of European countries, including [France](#) and [Italy](#), is concluding that the conflict ticks every box of a "war of choice." The war is perceived as illegal under international law regarding pre-emptive strikes, and strategically distracting, given the ongoing war of attrition in Ukraine.

The failure of the decapitation strike only underscores a perception of strategic miscalculation on Washington's part. [Reports](#) suggesting that the U.S. negotiators with Iran, Steve Witkoff and Jared Kushner, failed to grasp the quality of Iranian concessions on the nuclear issue, due to their failure to draw on qualified technical expertise, have raised the spectre of a basic lack of competence and seriousness in the U.S. approach.

As a result, even Merz has shifted his rhetoric by [highlighting](#) the risks of Iran's disintegration and imploring the U.S. and Israel not to destroy Iranian statehood.

A major concern for the Europeans is that the war in Iran has provided a strategic windfall for Russia, Europe's main adversary because of its war in Ukraine.

The surge in oil prices [bolsters](#) Russia's budget while straining Ukraine's finances. Disruptions to Gulf energy supplies enhance China's reliance on Russia as a guaranteed source of hydrocarbons, potentially deepening Sino-Russian cooperation. Simultaneously, Europe's energy distress may eventually create preconditions for a normalization of relations with Moscow—a prospect that is currently unthinkable in official discourse but may [gain traction](#) if Gulf supplies remain unavailable for months.

Furthermore, Washington's need to prevent a solidified Beijing-Moscow alliance elevates Russia's importance in U.S. global calculations. Moscow gains leverage not through its own actions, but simply by existing as a counterweight to China in American strategic thinking.

Another unwelcome development for Europe is the further erosion of the concept of "international law", the very foundation of Europe's case against Russia. That erosion, however, is fueled from within by officials like Commission von der Leyen; she [seemed](#) to disregard the importance of the concept when addressing EU ambassadors in Brussels. She was immediately contradicted by the Council President, Antonio Costa, who [emphasized](#) the central role of international law as a pillar of EU external action.

Thus, the war in Iran has exposed not only divisions among EU member states but also among the institutions of the EU. These divisions are fundamentally about the very direction in which the EU will evolve: whether as a vassal of a Washington that is increasingly untethered from any constraints and rules, or as an actor capable of defining its own interests and acting accordingly.

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