

Política Internacional e Geopolítica a policrise do mundo globalizado

**INSTITUTO CULTURAL
D. ANTÓNIO FERREIRA GOMES
José Pedro Teixeira Fernandes**

SESSÃO N° 21

4/3/2026



PARTE I – TEMA PRINCIPAL

A guerra do juízo final no Irão (1)

[FONTE: Público, 1/03/2026]



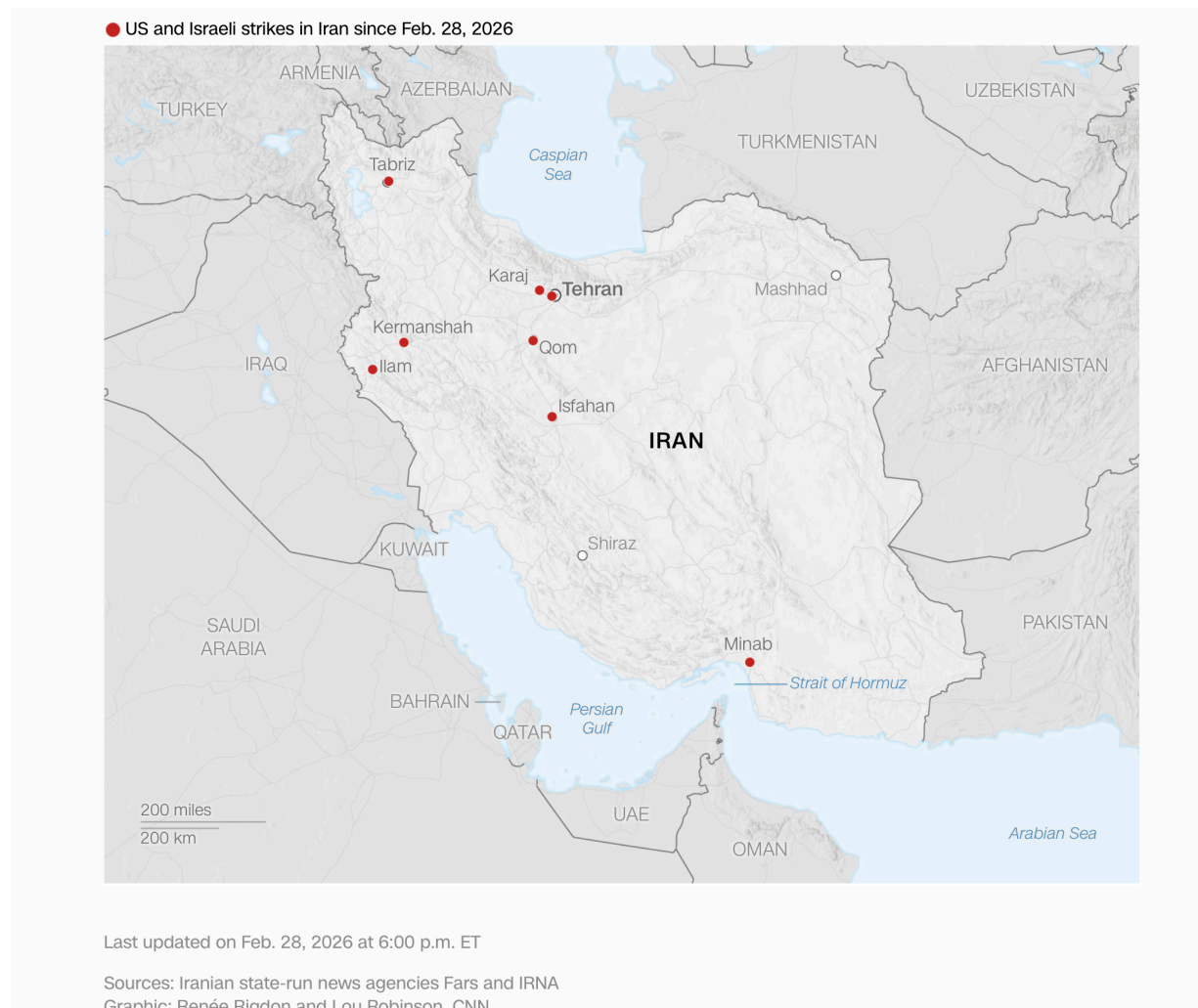
A nova guerra de Trump

Ataque ao Irão Trump e Netanyahu visam derrubar regime de Teerão • Conflito ameaça acesso da China a energia • Portugal evita comentar uso da Base das Lajes • Luís Amado: “Ter uma guerra civil no Irão será um pesadelo” • Opiniões de Teixeira Fernandes e Teresa de Sousa **Destaque, 2 a 9, P2 e Editorial**

A guerra do juízo final no Irão (2)

[FONTE: CNN, 28/02/2026]

Visualizing the US-Israeli attack on Iran retaliation in maps and charts



A guerra do juízo final no Irão (3)

[FONTE: CNN, 28/02/2026]

Iran has targeted US military bases in retaliatory strikes

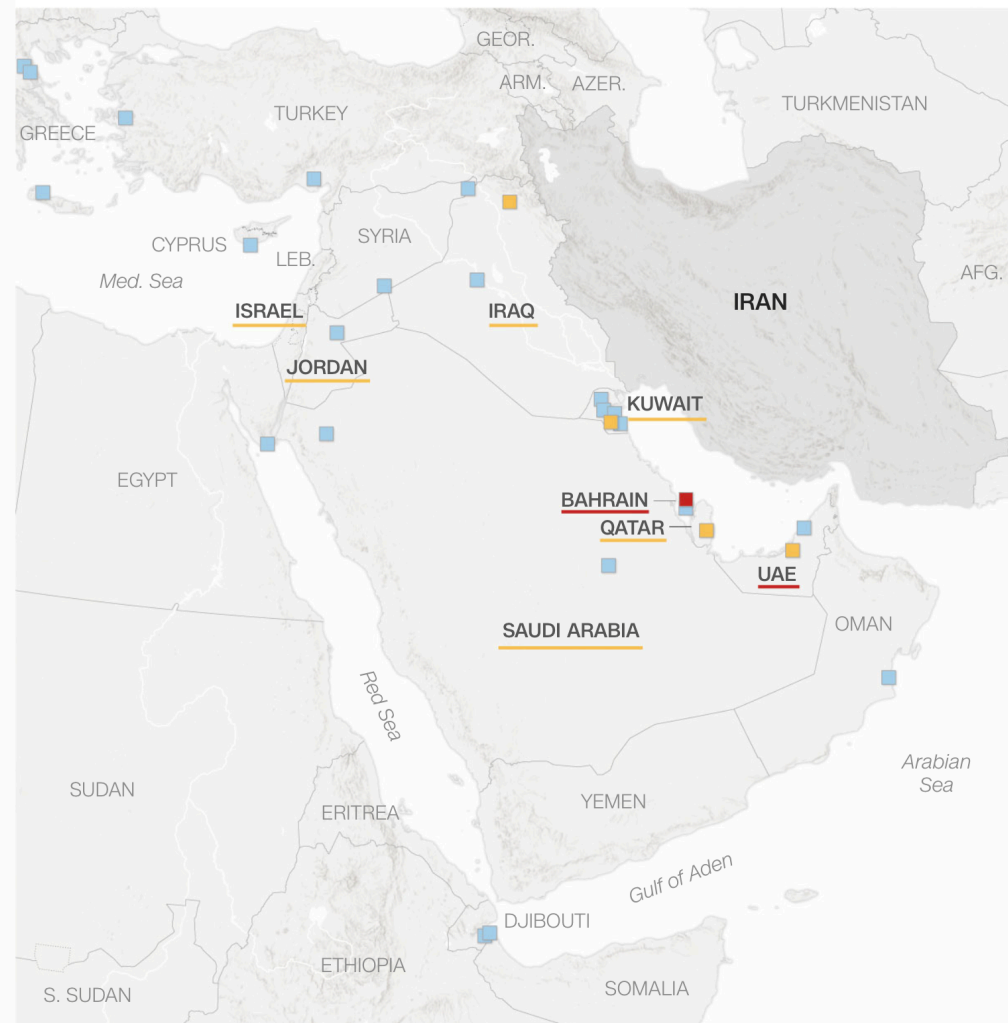
Iran has fired retaliatory strikes against countries hosting US military bases across the Middle East, after the United States and Israel began airstrikes on Iranian military and government targets on Saturday morning.

US military sites

■ Hit by Iranian strike ■ Targeted
■ Other

Country hit by Iranian strike

Country targeted by Iranian strike



A guerra do juízo final no Irão (4)

[FONTE: CNN, 28/02/2026]

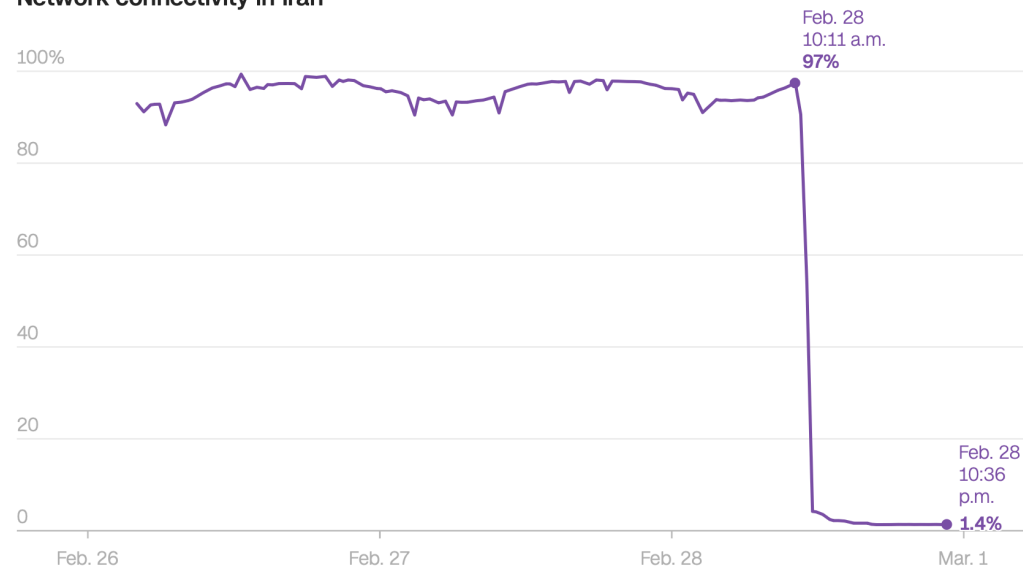
Internet access has been disrupted across Iran

As of Saturday night local time, Iran's internet connectivity had dropped to about 4% following the strikes.

Iran's internet has been disrupted amid strikes

Internet connectivity in Iran dropped to around 1% on Saturday, Feb. 28, 2026, following strikes from Israel and the United States.

Network connectivity in Iran



Note: All times local. Data through February 28, 2026, at 10:36 p.m. Iran Standard Time

Source: NetBlocks

Graphic: Rosa de Acosta, CNN

A guerra do juízo final no Irão (5)

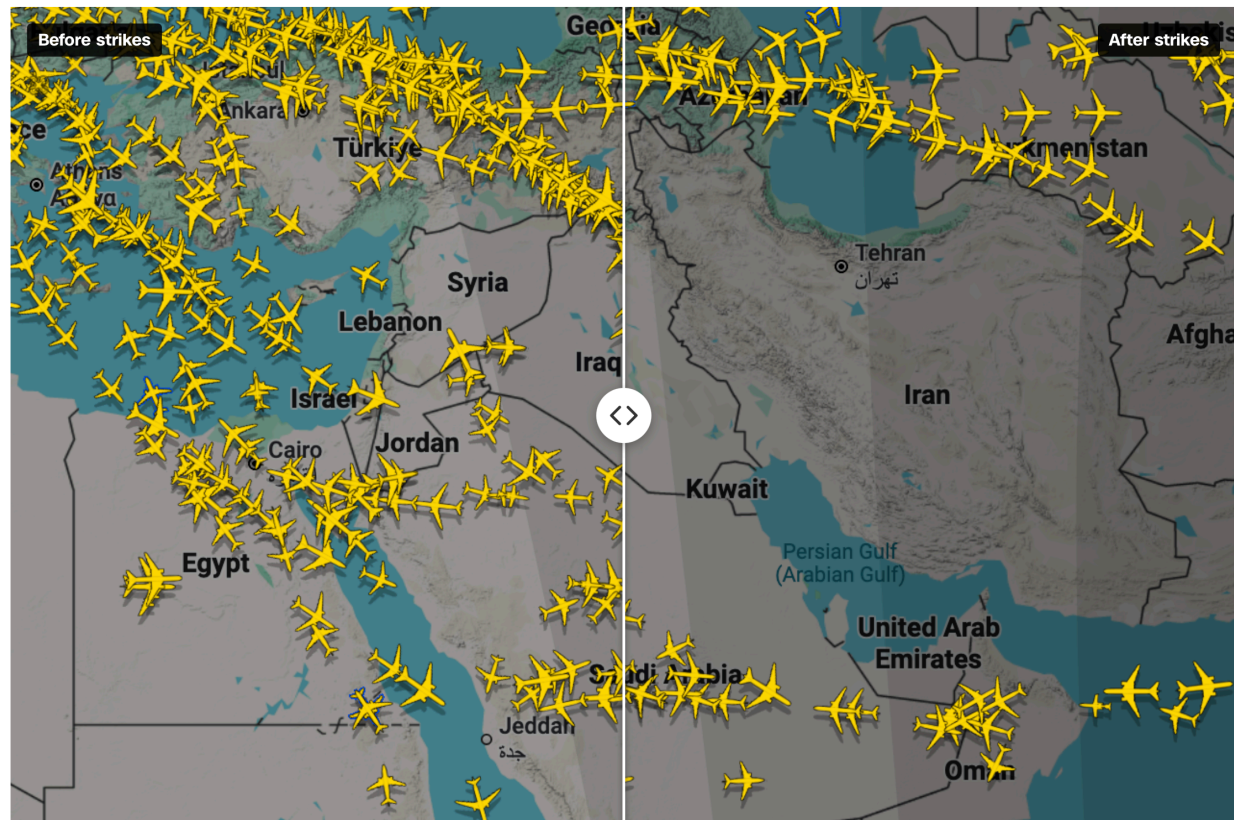
[FONTE: CNN, 28/02/2026]

Strikes caused regional flight disruptions

Data from Flightradar24 shows virtually no flight traffic over Iran and other Middle Eastern countries after the strikes. This graphic compares air traffic from a week ago to traffic on Saturday evening, local time.

Airspace over Iran before and after strikes

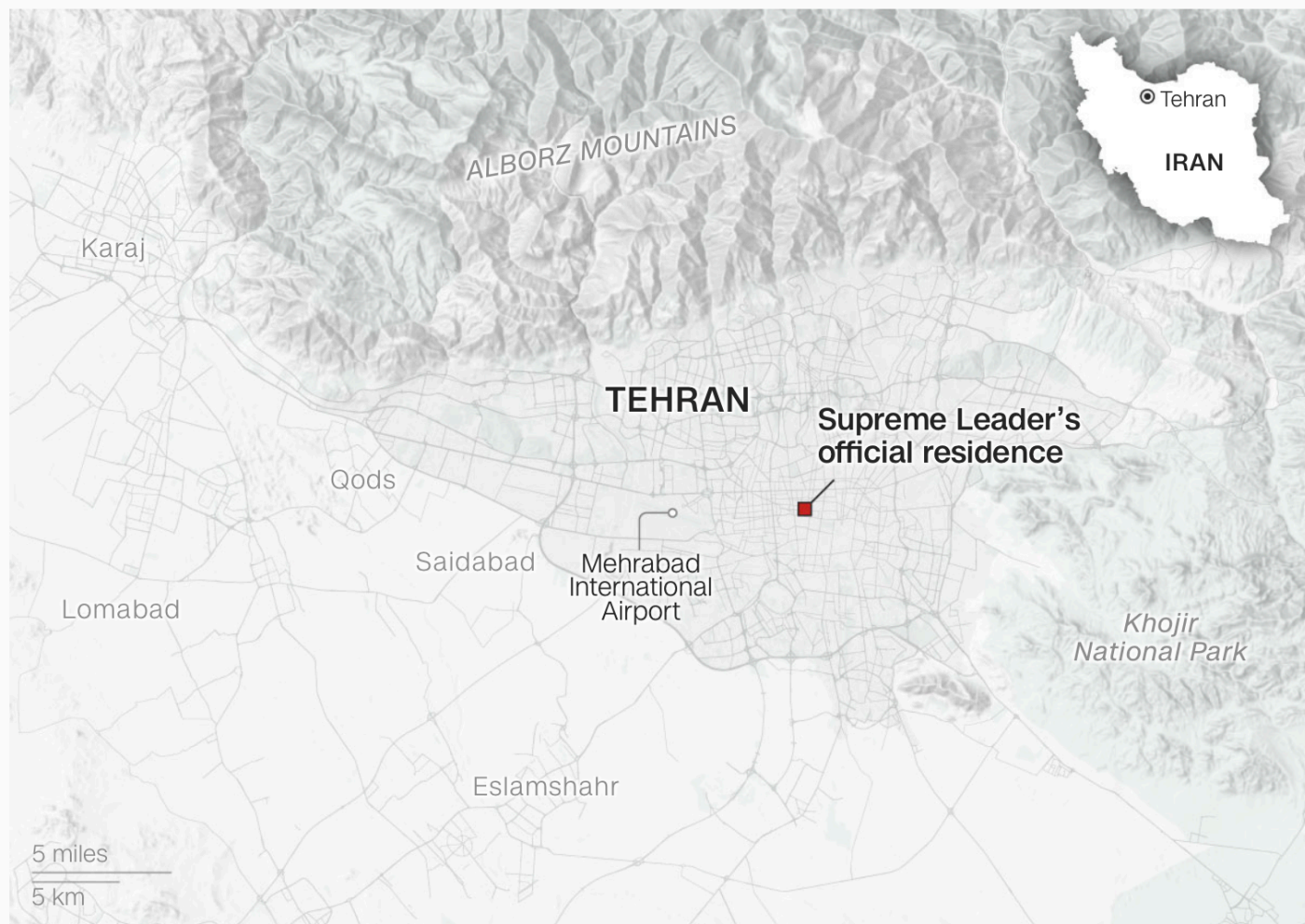
Flight tracking data shows the airspace over Iran before and after military strikes on Feb. 28, 2026.



Note: Images captured at 10:20 a.m. ET on Feb. 28 and 10:20 a.m. ET on Feb. 21.

A guerra do juízo final no Irão (6)

[FONTE: CNN, 28/02/2026]



Source: OpenStreetMap
Graphic: Lou Robinson, CNN

A guerra do juízo final no Irão (7)

[FONTE: CNN, 28/02/2026]



Smoke billows above the compound of Supreme Leader Ayatollah Ali Khamenei in Tehran, Iran, on Saturday February 28. *(Airbus)*

A guerra do juízo final no Irão (8)

[FONTE: Donald Trump / Truth Social, 28/02/2026]



Donald J. Trump 
@realDonaldTrump

Khamenei, one of the most evil people in History, is dead. This is not only Justice for the people of Iran, but for all Great Americans, and those people from many Countries throughout the World, that have been killed or mutilated by Khamenei and his gang of bloodthirsty THUGS. He was unable to avoid our Intelligence and Highly Sophisticated Tracking Systems and, working closely with Israel, there was not a thing he, or the other leaders that have been killed along with him, could do. This is the single greatest chance for the Iranian people to take back their Country. We are hearing that many of their IRGC, Military, and other Security and Police Forces, no longer want to fight, and are looking for Immunity from us. As I said last night, "Now they can have Immunity, later they only get Death!" Hopefully, the IRGC and Police will peacefully merge with the Iranian Patriots, and work together as a unit to bring back the Country to the Greatness it deserves. That process should soon be starting in that, not only the death of Khamenei but the Country has been, in only one day, very much destroyed and, even, obliterated. The heavy and pinpoint bombing, however, will continue, uninterrupted throughout the week or, as long as necessary to achieve our objective of PEACE THROUGHOUT THE MIDDLE EAST AND, INDEED, THE WORLD!

Thank you for your attention to this matter.

PRESIDENT DONALD J. TRUMP

24.2k ReTruths 89.7k Likes

Feb 28, 2026 at 9:37 PM

A guerra do juízo final no Irão (9)

[FONTE: WSJ, 28/02/2026]

Why the U.S. and Israel Struck When They Did: A Chance to Kill Iran's...



Israeli and U.S. military intelligence had long watched and waited for a rare opportunity: senior political and military leaders in Iran holding a meeting—where they could all be killed at once.

The day finally came Saturday.

Intelligence officers had identified not just one meeting but three, Israeli officials said. And they had a fix on Supreme Leader Ayatollah Ali Khamenei, Iran's top decision maker and spiritual leader.

The moment was so unique that [U.S. and Israeli warplanes struck](#) in full daylight. Israeli jets dropped 30 bombs on Khamenei's compound leaving it scorched and shattered.

A guerra do juízo final no Irão (10)

[FONTE: WSJ, 28/02/2026]

Israel also said it had killed a number of other top political and military officials including Ali Shamkhani, a top security adviser to Khamenei; Mohammad Pakpour, commander of the powerful Islamic Revolutionary Guard Corps; and Defense Minister Amir Nasirzadeh.

The attacks once again highlighted the capabilities of Israel's intelligence services and its ability to catch its enemies vulnerable and unaware.

"Everybody waited for a target at midnight, when there is cover of darkness," said Amos Yadlin, a former head of Israeli military intelligence, adding that Israel struck late at night at the start of its surprise attack on Iran last June. [The daylight attack](#), he said, "was a tactical surprise."

Iranian state television [said Khamenei was killed](#) Saturday. The ayatollah's death caps more than two years of war in which Israel has also killed the top leaders of Hamas and Hezbollah, indirectly precipitated the collapse of the Assad regime in Syria, and created the most severe crisis for Iran's regime in its half-century in power.

But it also ushers in a period of uncertainty and possible instability that alarms other Persian Gulf governments, and reveals an ambition for regime change that has led to frustrating failures for prior American administrations. President Trump and Israeli Prime Minister Benjamin Netanyahu encouraged Iranians to rise up and take control of their country. Few activists or analysts say there is a clear path for them to do so.

A guerra do juízo final no Irão (11)

[FONTE: Telegraph, 28/02/2026]

Khamenei dead: How the US pulled off the assassination of the century

Before that, as rumours swirled about Khamenei's fate, it fell to Mr Trump to confirm Khamenei's death and eulogise him as "one of the most evil people in history".

"This is not only Justice for the people of Iran, but for all Great Americans, and those people from many Countries throughout the World, that have been killed or mutilated by Khamenei and his gang of bloodthirsty THUGS," he wrote on social media.

"He was unable to avoid our Intelligence and Highly Sophisticated Tracking Systems and, working closely with Israel, there was not a thing he, or the other leaders that have been killed along with him, could do."

A guerra do juízo final no Irão (12)

[FONTE: Telegraph, 28/02/2026]

Inner circle may have betrayed him

Precisely what tracking systems Mr Trump was referring to is, as yet, unclear. Some have speculated there was a spy within the Ayatollah's inner circle who would eventually bring him down.

The US has a "wide variety of intelligence, surveillance, and reconnaissance capabilities that could have been used to track Khamenei", said Ryan Brobst, a deputy director at the Foundation for Defence of Democracies.

He told The Telegraph: "These include aerial and space-based surveillance capabilities, signals and electronic intelligence, communications intercepts, as well as human intelligence."

Mr Trump's statement suggested that although the US had kept the Ayatollah in its sights, it was Israel that finally pulled the trigger.

That appears to tally with briefings from officials on both sides, who have said that the US focused its waves of Tomahawk missiles, HIMARS rockets and drones on military targets as part of "Operation Epic Fury", while Israel hit missile depots and officials.

A guerra do juízo final no Irão (13)

[FONTE: Telegraph, 28/02/2026]

As part of a wave of cyberattacks, a popular Muslim prayer app, BadeSaba Calendar, was hacked to encourage members of the military to defect and join the “liberation forces”. The Islamic Republic News Agency (IRNA), a state news agency, was hijacked to publish stories about the

“crippling blow” inflicted on the authorities.

Even as Iranian officials continued to deny the Supreme Leader’s death, there was a hint for followers on his social media page.

Its last post featured the image of a cloaked figure brandishing a short, fork-tongued Middle Eastern sword known as a Zulfiqar. The weapon is associated with Ali ibn Abi Talib, a cousin of the Prophet Mohammed, who was assassinated in 661.

“In the name of Nami Haider,” reads the caption, translated from Persian. “Peace be upon him”.

And immediately following reports of Khamenei’s assassination, his top aide Ali Larijani vowed revenge.

A guerra do juízo final no Irão (14)

[FONTE: NYT, 1/03/2026]

Diagramming the Blows to Iran's Leadership



A guerra do juízo final no Irão (15)

[FONTE: NYT, 22/02/2026]

Inside Iran's Preparations for War and Plans for Survival

Ayatollah Ali Khamenei has entrusted Ali Larijani, the top national security official, to ensure the Islamic Republic endures any military attacks and targeted killings.



Ali Larijani, the secretary of the Supreme National Security Council of Iran, in May 2024. Arash Khamooshi for The New York Times

A guerra do juízo final no Irão (16)

[FONTE: NYT, 22/02/2026]

In early January, as Iran faced nationwide protests and the threat of strikes by the United States, the nation's supreme leader, Ayatollah Ali Khamenei, turned to a trusted and loyal lieutenant to steer the country: Ali Larijani, the country's top national security official.

Since then, Mr. Larijani, 67, a veteran politician, a former commander in the Revolutionary Guards Corps and the current head of the Supreme National Security Council, has effectively been running the country. His rise has sidelined President Masoud Pezeshkian, a heart surgeon turned politician, who [has faced a challenging year in office](#) and continues to say publicly that "I'm a doctor, not a politician," and that no one should expect him to solve the multitude of problems in Iran.

This account of Mr. Larijani's ascent and the decisions and deliberations of Iran's leadership as the Trump administration threatens war is based on interviews with six senior Iranian officials, one of them affiliated with Ayatollah Khamenei's office; three members of the Revolutionary Guards; two former Iranian diplomats; and reports from the Iranian news media. The officials and members of the Guards spoke on the condition of anonymity to candidly discuss internal government matters.

A guerra do juízo final no Irão (17)

[FONTE: NYT, 22/02/2026]

Ayatollah Khamenei has instructed Mr. Larijani and a handful of other close political and military associates to ensure that the Islamic Republic survives not only American and Israeli bombs, but also any assassination attempts on its top leadership, including on Ayatollah Khamenei himself, according to the six senior officials and the Guards members.

Nasser Imani, a conservative analyst close to the government, said in a telephone interview from Tehran that Ayatollah Khamenei has a long and close relationship with Mr. Larijani, and the supreme leader turned to him in this time of acute military and security crisis.

"The supreme leader fully trusts Larijani. He believes Larijani is the man for this sensitive juncture because of his political track record, sharp mind and knowledge," Mr. Imani said. "He relies on him for reports on the situation and pragmatic advice. Larijani's role will be very pronounced during war."

Mr. Larijani comes from an elite political and religious family, and for 12 years, he was the speaker of Parliament. In 2021, he was put in charge of negotiating a 25-year comprehensive strategic deal with China worth billions.

A guerra do juízo final no Irão (18)

[FONTE: NYT, 22/02/2026]

Some of this planning is the result of lessons drawn from Israel's surprise attack in June, which wiped out Iran's senior military command chain within the first hours of the war. After the cease-fire, Ayatollah Khamenei appointed Mr. Larijani as the secretary of the National Security Council and created a new National Defense Council, headed by Adm. Ali Shamkhani, to manage military affairs during wartime.

"Khamenei is dealing with the reality in front of him," said Vali Nasr, an expert on Iran and its Shiite theocracy at the Johns Hopkins School of Advanced International Studies.

"He is expecting to be a martyr and thinking, this is my system and legacy, and I will stand until the end," Mr. Nasr said. "He is distributing power and preparing the state for the next big thing, both succession and war, aware that succession may come as a consequence of war."

Iran is operating on the basis that U.S. military strikes are inevitable and imminent, even as both sides continue to engage diplomatically and [negotiate](#) on a nuclear deal, the six officials and three Guards members said. They said Iran had placed all of its armed forces on the highest state of alert and was preparing to resist fiercely.

The country is positioning ballistic missile launchers along its western border with Iraq — close enough to strike Israel — and along its southern shores on the Persian Gulf, within range of American military bases and other targets in the region, the three Guards members and four senior officials said.

A guerra do juízo final no Irão (19)

[FONTE: David Swift / Unheard, 1/03/2026]

Iran strikes may prove last great act of US-Israeli cooperation

David Swift



Benjamin Netanyahu probably can't believe his luck. Two years after presiding over the greatest security failure in Israeli history, he has persuaded a US President to participate in a full-scale attack on Iran.

A guerra do juízo final no Irão (20)

[FONTE: David Swift / Unheard, 1/03/2026]

Bibi has obviously calculated that the Iranian retaliation against Israel, currently underway, would not prove too damaging. Time will tell if he has been too optimistic, but he would not have participated in the attack if he anticipated Israel suffering significant casualties. When Israel conducted strikes on Iran in June, they were sold to the public as unavoidable moves in an existential clash. But this latest operation is clearly a war of choice, with Iran posing no immediate threat to Israel, and not likely to do so for some time.

Nonetheless, he realized that it was now or never. Whoever takes over the White House after Donald Trump, be they Republican or Democrat, will be far less amenable to Israel than Trump, Biden or even Obama. Until last summer, Bibi was fearful that the best he could expect from any US administration was a negotiated deal with Iran along the lines of the 2015 Joint Comprehensive Plan of Action. As recently as this time last year, it seemed absurd that the US would sanction such an attack, let alone participate.

This was evident in Trump's first administration, where the President was far more skeptical about strikes on Iran. In 2019, Trump [defenestrated](#) his Secretary of State, John Bolton, partly due to his desire for military strikes. When he returned to office last January, Trump went as far as to [remove](#) Bolton's state-provided security detail, despite credible threats to his life from the Iranian regime.

A guerra do juízo final no Irão (21)

[FONTE: David Swift / Unheard, 1/03/2026]

But now Trump is on board, and it's unclear what persuaded the US President to attack Iran now. Netanyahu may have made limited concessions over Gaza, including ceding some Israeli control to Trump's proposed "Board of Peace". Nonetheless, it's hard to believe that Bibi had enough leverage to be the sole reason that Trump took action on Iran. To take such a risk in terms of potential American casualties and his own standing with the anti-isolationists among his base indicates that this was Trump's call.

Instead, the US President must be looking at how this benefits his administration. Since he won't run again and has less than three years left, he wants to secure his foreign policy legacy. After the capture of Maduro, this remains another major pillar of that legacy that may only be augmented by regime change in Cuba. The attack on Iran, therefore, represents the pinnacle of Bibi's statesmanship and his influence on US foreign policy. Yet, this may be a sign of a last hurrah for the US-Israeli relationship.

Just yesterday, Gallup produced a [poll](#) showing that for the first time, more Americans sympathized with the Palestinians (41%) than with Israel (36%). Only 12 months ago, those numbers were 46% to 33% in favor of Israel. Public opinion in America is shifting on the relationship with Israel, and will undoubtedly influence policy going forward. Recognizing this, Netanyahu will have seen Trump as perhaps the last US President that he could hold influence over, and decided now was the time to act.

A guerra do juízo final no Irão (22)

[FONTE: Herb Scribner / AXIOS, 1/03/2026]

How Trump's Iran gamble breaks from past regime overthrows



Photo illustration: Sarah Grillo/Axios. Photos: Majid Saeedi and Stefani Reynolds/Bloomberg via Getty Images

President Trump's bid to [topple Iran's regime](#) marks a sharp break from two decades of U.S. intervention playbooks across multiple presidencies.

The big picture: Trump's weekend strikes on Iran — and his explicit call for an uprising — diverge from how the U.S. approached regime pressure in [Iraq](#) and [Venezuela](#), historians tell Axios. The gamble signals a more unpredictable stretch of his foreign policy ahead as he openly threatens force elsewhere.

A guerra do juízo final no Irão (23)

[FONTE: Herb Scribner / AXIOS, 1/03/2026]

State of play: Trump announced military strikes against Iran on Saturday and vaguely called for Iranian people to overtake their government following months of their demanding a [regime change](#) amid worsening economic conditions.

- The attacks [were a result](#) of failed diplomacy over Iran's nuclear weapon supply as tensions mounted between the countries through Trump's second term.

After announcing the operation Saturday, Trump addressed Iranians in a video: "When we are finished, take over your government. It will be yours to take. This will be probably your only chance for generations."

- Trump exclusively [told Axios](#) the "off ramps" he envisions: "I can go long and take over the whole thing, or end it in two or three days and tell the Iranians: 'See you again in a few years if you start rebuilding [your nuclear and missile programs].'"

Reality check: Trump's Iran play is different than the U.S. invasion of Iraq in 2003 under former President George W. Bush and the seizure of Venezuela's leader Nicolás Maduro in January — two instances where the U.S. took a more direct hand in dismantling a government's power structure.

- "Iran is different from both of those conflicts," retired U.S. Army Colonel Peter Mansoor, professor of military history at The Ohio State University, tells Axios.

Both regime overthrows, the historians said, were done with future government infrastructure in mind — which is less clear in the Iran crisis so far.

- "As General David Petraeus remarked at the beginning of the Iraq War in 2003, 'Tell me how this ends,'" Mansoor said.

A guerra do juízo final no Irão (24)

[FONTE: Herb Scribner / AXIOS, 1/03/2026]

Differences with Iraq War

When former President Bush sought to overthrow Saddam Hussein's regime in Iraq, he started with a full-scale invasion that included deploying [200,000 American ground troops](#) in March 2003.

- Baghdad fell within weeks, and Hussein was captured just under nine months later in December 2003.

The U.S. coalition [against Iraq](#) had specific objectives: removing Hussein from power and eliminating alleged weapons of mass destruction.

- The U.S. led an interim government before [power was eventually transferred](#) — though this came after many years of war. Full Iraq sovereignty began after the U.S. withdrew forces in 2011.

The Iraq War is "an example of some of the faulty assumptions that go into the idea that replacing the political leadership of another country can happen quickly and easily," David Kieran, a military history professor at Columbus State University, tells Axios.

The other side: With Iran, Trump isn't suggesting the U.S. controls the government or puts boots on the ground. So far, his suggestions tease Iranians taking back control on their own.

A guerra do juízo final no Irão (25)

[FONTE: Jerusalem Post, 1/03/2026]

Why Iran's attack on Gulf states mimics Iraq's assault on Saudi Arabia - analysis

Iran's attack might have the opposite effect, bringing Gulf countries closer together and enabling cooperation with the US and among themselves.

MARCH 1, 2026 11:52



A guerra do juízo final no Irão (26)

[FONTE: Jerusalem Post, 1/03/2026]

On the evening of January 29, 1991, three Iraqi divisions left their trenches in Kuwait and began a slow assault on the Saudi Arabian town of Khafji. The Iraqi units ran into resistance, and many of them had been degraded over days of airstrikes by the [US-led Coalition](#) that was backing [Saudi Arabia](#). The coalition was preparing to liberate Kuwait, which it would do on February 24. In some ways, the Iraqi offensive echoes Iran's attacks today on many Gulf countries, amidst the US and Israeli strikes on Iran.

The battle of Khafji was Iraq's attempt to show that even under massive bombardment by the US Air Force and other allies, it could still launch an offensive. The Iraqi army had stood up well during a decade of war with Iran in the 1980s. However, its Soviet armed divisions, consisting of tanks and infantry, were no match for the coalition. Some 60,000 Iraqi soldiers participated in the offensive. In three days of battle, it was all over for them.

Iraq's attack on Saudi Arabia came after Iraq had already invaded Kuwait in 1990. The Iraqi invasion had led the US to assemble a huge coalition to defend Saudi Arabia and the Gulf. Then the US and the other forces pushed Iraq out of Kuwait. America's close alliance with many Gulf states has origins in that fight. Much was learned during that war, and it brought the US closer to Saudi Arabia, Qatar, the UAE, Kuwait, and other states.

A guerra do juízo final no Irão (27)

[FONTE: Jerusalem Post, 1/03/2026]

Today, Iran is the one attacking these Gulf countries. Iran is waging part of its war with the US on Israel by striking at Bahrain, the UAE, Qatar, and other countries in the Gulf. Dozens of projectiles have apparently been launched at Qatar, Bahrain, and the UAE, including missiles and drones.

Although Iran maintains a pretense that it is attacking US forces, the videos show that Iranian drones and other munitions have hit apartment buildings, a hotel, and apparently damaged an airport. In other instances, the Iranians have struck at military targets. However, it seems that Iran has a two-pronged approach. It wants to strike at US bases, but it also wants to drive up the “price” for these Gulf countries hosting US forces.



Smoke rises in the sky after blasts were heard in Manama, Bahrain, February 28, 2026. (credit: REUTERS/STRINGER)

A guerra do juízo final no Irão (28)

[FONTE: Jerusalem Post, 1/03/2026]

Iran's behavior is similar to Iraq's in 1991. Iraq lashed out not only at Saudi Arabia but also fired Scud missiles at [Israel](#). Iraq's attacks on Israel helped accelerate Israel's investment in air defenses. This has helped Israel stay safer during the recent conflict with Iran. The Arrow missile defense system has its origins in the need to defend against the Scud threat. As such, Iran's actions today are linked to Iraq's actions in 1991.

Iran's attack on Gulf States brings them closer together

So far, Iran has exacted a price. Flights have been cancelled in the [Gulf](#). Commerce is the key feature of many of these countries. Without flights, it is hard for them to do business, and their large expat populations will suffer.

On the other hand, the attacks will bring these countries closer together, enabling cooperation with the US and among themselves. Many of these countries operate air defenses acquired from the US. In addition, the UAE and Israel have normalized ties, which means they will benefit from Israeli expertise as well.

Iran has thus lashed out, but could end up causing the opposite effect it intended. The regime has long caused havoc in the Gulf. In 1983, Iran was linked to embassy bombings carried out in Kuwait. Iran has also long terrorized shipping in the Gulf, using threats against shipping to maintain its influence. Back in 2019, Iran even mined several tankers, causing havoc off the coast of the UAE. Iran has also harassed naval vessels in the Gulf, even kidnapping crew.

A guerra do juízo final no Irão (29)

[FONTE: Jerusalem Post, 1/03/2026]

This shows that attacks on the Gulf are not new for Iran. It has also launched drone attacks on ships in the past, and it has encouraged its proxies, the Houthis in Yemen and Kataib Hezbollah in Iraq, to launch attacks on Saudi Arabia. The Houthis have also targeted the UAE in the past. Therefore, the Gulf countries know the threat they are dealing with.

Dr. Anwar Gargash, an advisor to the president of the UAE, posted on social media that "Iranian aggression against the Gulf states has misdirected its target and isolated Iran at its critical moment. Your war is not with your neighbors, and with this escalation, you confirm the narrative of those who see Iran as the main source of danger to the region, and that its missile program is a permanent source of instability." He added, "return to your senses, to your surroundings, and deal with your neighbors rationally," *Al-Ain* news noted. In a subsequent interview, he said that the UAE will not sit quietly in the face of the attacks.

Arab News noted on March 1 that "loud blasts were heard in Dubai and Qatari capital Doha for a second day on Sunday, and Oman was hit for the first time as retaliatory strikes on neighboring Gulf states in response to US and Israeli strikes on the Islamic Republic widened."

In addition, it said, "Two people were injured in Dubai after shrapnel from drones fell over two houses when they were intercepted, a Dubai media office statement said. Dubai's international airport, its landmark Burj Al Arab hotel, and man-made Palm Jumeirah Island all suffered damage."

A guerra do juízo final no Irão (30)

[FONTE: Stephen Walt / Foreign Policy, 2/03/2026]

The United States Is Still Addicted to War

Why every U.S. president ends up in a major military campaign.

March 2, 2026, 2:42 AM



President Donald Trump observes naval flight demonstrations on the deck of the USS George H.W. Bush aircraft carrier on October 5, 2025 off the eastern coast of the United States.

President Donald Trump observes naval flight demonstrations on the deck of the USS George H.W. Bush aircraft carrier on October 5, 2025 off the eastern coast of the United States. Alex Wong/Getty Images

A guerra do juízo final no Irão (31)

[FONTE: Stephen Walt / Foreign Policy, 2/03/2026]

No matter what they say, American presidents find it impossible not to go to war. Back in 1992, Bill Clinton won the presidency by saying "it's the economy, stupid," and declaring the era of power politics to be over. Once in office, however, he found himself ordering missile strikes in several countries, maintaining no-fly zones over Iraq (and sometimes bombing it), and waging a long aerial campaign against Serbia in 1999.

In 2000, George W. Bush captured the White House by criticizing Clinton's overactive foreign policy and promising voters a foreign policy that was strong but "humble." We all know how that turned out. Eight years later, a young senator named Barack Obama became president in good part because he was one of the few Democrats who had opposed the invasion of Iraq in 2003. Within a year of assuming office, he had a Nobel Peace Prize he had done nothing to earn, simply because people believed he'd be a committed peacemaker. Obama did try on several issues and eventually reached an agreement scaling back Iran's nuclear program, but he also ordered a pointless "surge" in Afghanistan, helped topple the Libyan regime in 2011, and grew increasingly comfortable ordering signature strikes and other targeted killings

A guerra do juízo final no Irão (32)

[FONTE: Stephen Walt / Foreign Policy, 2/03/2026]

No matter what they say, American presidents find it impossible not to go to war. Back in 1992, Bill Clinton won the presidency by saying "it's the economy, stupid," and declaring the era of power politics to be over. Once in office, however, he found himself ordering missile strikes in several countries, maintaining no-fly zones over Iraq (and sometimes bombing it), and waging a long aerial campaign against Serbia in 1999.

In 2000, George W. Bush captured the White House by criticizing Clinton's overactive foreign policy and promising voters a foreign policy that was strong but "humble." We all know how that turned out. Eight years later, a young senator named Barack Obama became president in good part because he was one of the few Democrats who had opposed the invasion of Iraq in 2003. Within a year of assuming office, he had a Nobel Peace Prize he had done nothing to earn, simply because people believed he'd be a committed peacemaker. Obama did try on several issues and eventually reached an agreement scaling back Iran's nuclear program, but he also ordered a pointless "surge" in Afghanistan, helped topple the Libyan regime in 2011, and grew increasingly comfortable ordering signature strikes and other targeted killings

A guerra do juízo final no Irão (33)

[FONTE: Stephen Walt / Foreign Policy, 2/03/2026]

Joe Biden did end a war when he pulled the plug on America's futile U.S. campaign in Afghanistan, and he got pummeled for recognizing the reality his predecessors had ignored. Biden did orchestrate a vigorous Western response to Russia's illegal invasion of Ukraine in 2022, but most observers ignored how his earlier efforts to bring Ukraine within the Western orbit had made war more likely. Having ignored the Palestinian issue during his first two years as president, Biden provided the billions of dollars' worth of weapons and diplomatic protection for Israel's genocidal response to Hamas's attack on Israel in October 2023.

Biden's errors (and his stubborn insistence on trying to win a second term) helped Trump to return to the Oval Office, once again pledging to be a peace president and to end the incessant interventionism that has cost Americans trillions of dollars and thousands of lives.

A guerra do juízo final no Irão (34)

[FONTE: Stephen Walt / Foreign Policy, 2/03/2026]

What's going on here? Since 1992, a series of presidents representing both parties have run for office vowing to be peacemakers and to avoid their predecessors' excesses and mistakes, yet once in office they cannot resist the urge to blow stuff up in faraway lands. Once again, we must ask ourselves the [question](#): Is the United States addicted to war?

Until Trump's second term, one might explain this pattern by examining the hubristic mindset of the bipartisan foreign-policy "Blob," which saw military force as a useful tool for advancing a global liberal order. But that explanation has trouble explaining Trump's actions during his second term. Trump still loathes the establishment (aka, the "deep state"), blames it for the failures of his first term, has gutted the national security bureaucracy, and appointed a lot of loyal lackeys who will do his bidding to key positions. This latest war can't be blamed on the Blob.

A guerra do juízo final no Irão (35)

[FONTE: Stephen Walt / Foreign Policy, 2/03/2026]

One obvious reason is the [long-term consolidation of executive power](#) that has been underway since the early Cold War and expanded even more during the war on terror. We have granted presidents enormous latitude over decisions for war and peace, the conduct of diplomacy, the activities of a vast intelligence apparatus and covert action capability, and tolerated a degree of secrecy that makes it easier for the executive branch to lie when it needs to. Presidents from both parties have been all too happy to accept this freedom of action and rarely welcomed efforts to trim their powers. The consolidation of executive power has been aided and abetted by Congress, which has become decreasingly willing to exercise any meaningful oversight over decisions to use force. Thus, when the Obama administration actively sought a new authorization to use force (to replace the outdated resolutions that had authorized the war on terror and invasion of Iraq), Congress refused to provide one because its members didn't want to go on the record. And now they complain that the Trump administration didn't ask their permission before it decided to start another pointless war on Iran.

A guerra do juízo final no Irão (36)

[FONTE: Stephen Walt / Foreign Policy, 2/03/2026]

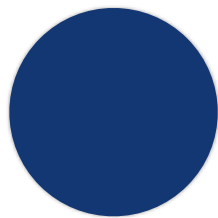
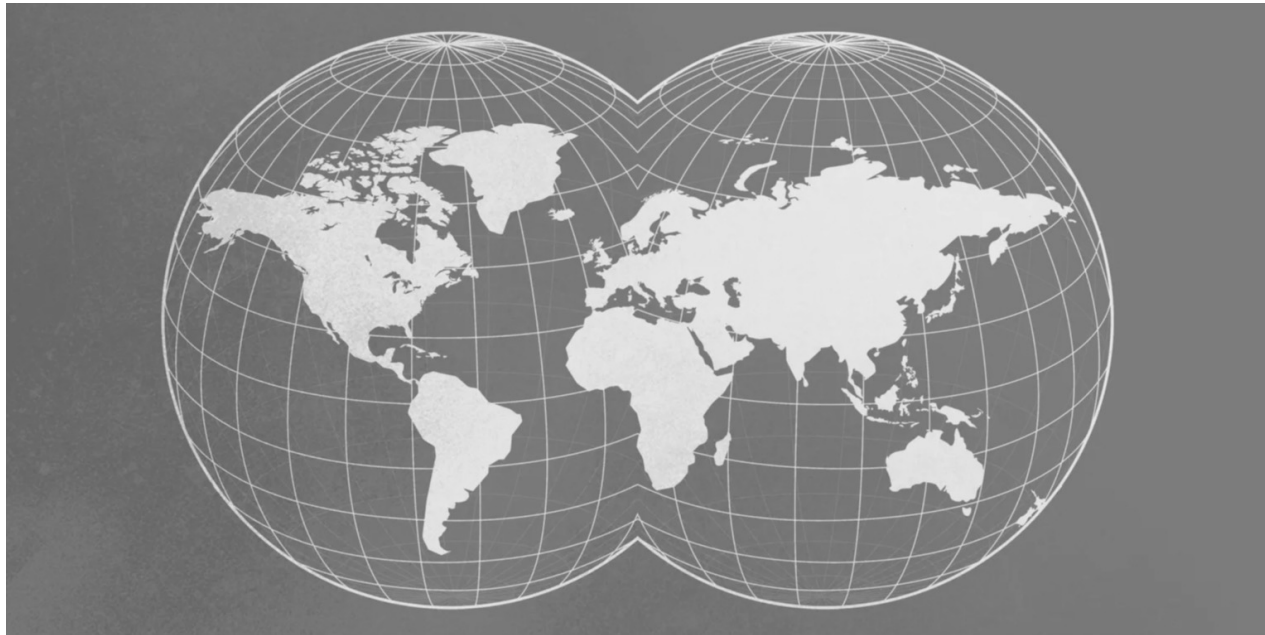
Second, as [Sarah Kreps](#) and [Rosella Zielinski](#) have both shown, American presidents are free to go to war because they have learned not to ask the American people to pay for it in real time. Korea was the last war that we directly raised taxes to pay for; since then, presidents have just borrowed the money, let the deficit grow some more, and stuck future generations with the bill. The result is that most Americans don't feel the economic consequences of even long and costly campaigns like the wars in Iraq and Afghanistan, which cost at least \$5 trillion.

The all-volunteer force also facilitates decisions for war, because the people sent into harm's way all signed up for this possibility and are less likely to complain than random draftees might be. It also allows elites like Trump (and his children) to evade service entirely, thereby reducing the extent to which the wealthy and politically connected feel personally affected by these decisions and gradually turning the professional military into a separate caste that is less connected to the broader society it is supposed to defend. But don't blame the military for these recurring decisions to use force; it is the civilians who are driving this train.

A guerra do juízo final no Irão (37)

[FONTE: Stephen Walt / Foreign Policy, 2/03/2026]

You can, however, blame the military-industrial complex. Please note: I'm not saying Lockheed Martin or Boeing lobbied for war with anyone, but when you are in the business of selling weapons, you are also in the business of selling insecurity. And that means portraying a world that is brimming with threats (some of which might need to be preempted), where diplomacy is devalued, and kinetic solutions are oversold. It is no accident that defense firms are prominent supporters of many foreign-policy think tanks, which often work to convince Americans that threats are lurking everywhere, that the United States might have to take military action against them no matter where on the planet they are occurring, and that bigger defense budgets are the obvious remedy. Once you've bought all those capabilities, it can be hard to resist the temptation to use them. There will also be special interest groups like AIPAC and the hawkish parts of the Israel lobby that will sometimes succeed in persuading presidents to go along and convince vulnerable congressional leaders not to object.

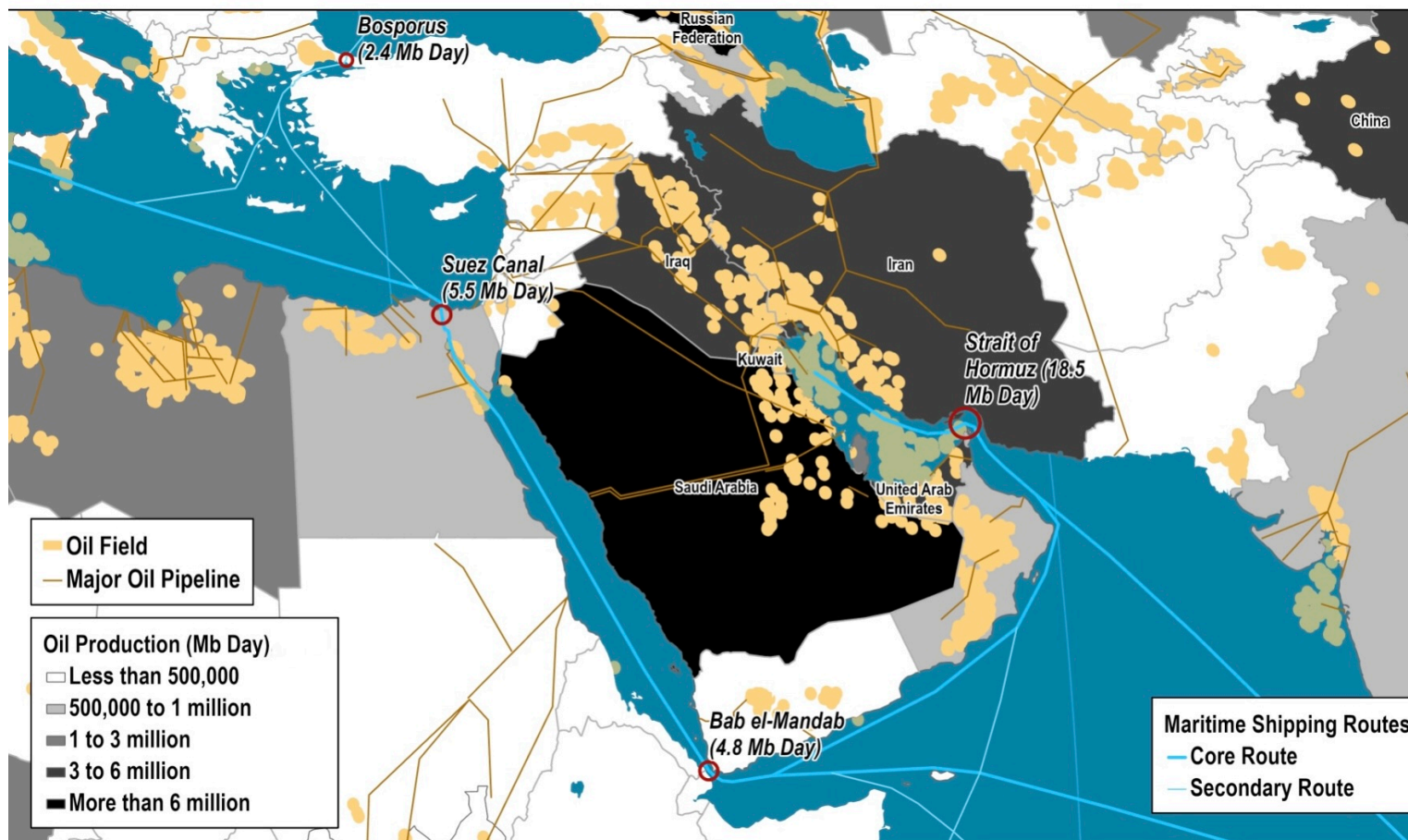


PARTE II – NOTAS BREVES

As consequências económicas da guerra no Irão (1)

[FONTE: Theo Notteboom, Athanasios Pallis and Jean-Paul Rodrigue (2026) Port Economics, Management and Policy, Routledge]

Shipping Lanes, Strategic Passages and Oil Production in the Middle East



Shipping Lanes Strategic Passages and Oil Production in the Middle East

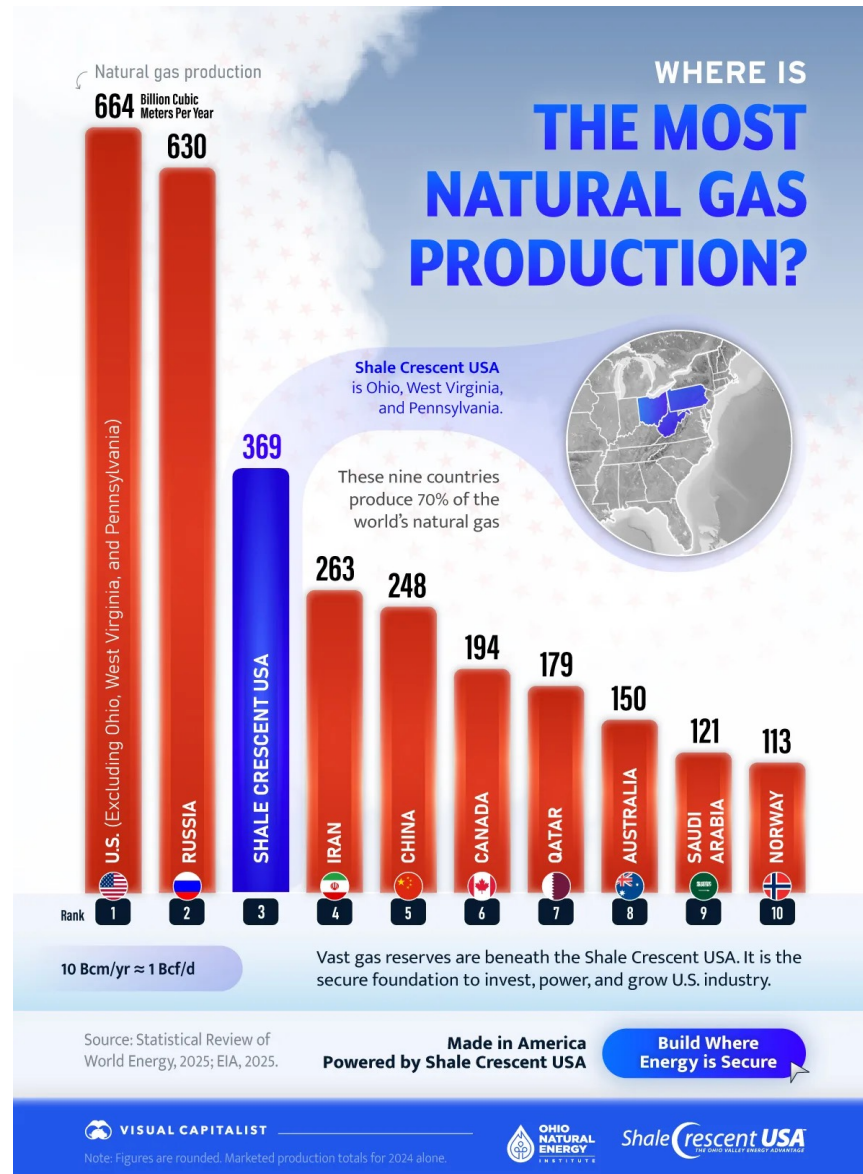
As consequências económicas da guerra no Irão (2)

[FONTE: Theo Notteboom, Athanasios Pallis and Jean-Paul Rodrigue (2026) Port Economics, Management and Policy, Routledge]

Concerning energy trades such as petroleum and natural gas, the Middle East is at a crossroads. First, it is an **intermediary location** as trade routes transit through the strategic passages of the region, particularly Bab el-Mandab and the Suez Canal. Second, it is one of the world's **largest exporter of energy**, the majority of which is carried by maritime shipping.

In addition to geopolitics, the geography of the Middle East creates unique challenges for petroleum distribution. The first is the **concentration of oil fields** around the Persian Gulf (Saudi Arabia, Kuwait, Iraq, Iran, and United Arab Emirates) leaving the Strait Hormuz as one of the only viable outlets to export oil using large oil tankers. The second is the **constrained capacity access to the main European markets** through the Suez Canal, implying that a fully laden VLCC (Very Large Crude Carrier) cannot transit through the canal and must round Africa.

As consequências económicas da guerra no Irão (3) [FONTE: Visual Capitalist, 2025]



As consequências económicas da guerra no Irão (4) [FONTE: CNBC, 2/02/2026]

Iran strikes halt Qatar LNG output, shaking global energy markets

European natural gas futures soared after the shutdown. U.K. natural gas spiked about 50%, while Dutch futures jumped more than 45%. Shares of U.S. LNG exporters [Cheniere Energy](#) and [Venture Global](#) jumped about 6% and more than 14%, respectively.

Iran launched missiles at U.S. allies across the Gulf over the weekend in retaliation for massive strikes by the U.S. and Israel that killed the Islamic Republic's supreme leader, Ayatollah Ali Khamenei. Saudi Aramco's Ras Tanura refinery was attacked by a drone, an industry source told CNBC. The refinery has been closed as a precautionary measure, the source said.

LNG is a type of natural gas that is super cooled at minus 260 degrees Fahrenheit into a liquid state and loaded on tankers for transport around the world. Natural gas is used primarily for electricity production.

As consequências económicas da guerra no Irão (5) [FONTE: Sarah Schiffing / The Conversation, 1/03/2026]

Strait of Hormuz: if the Iran conflict shuts world's most important oil chokepoint, global economic chaos could follow



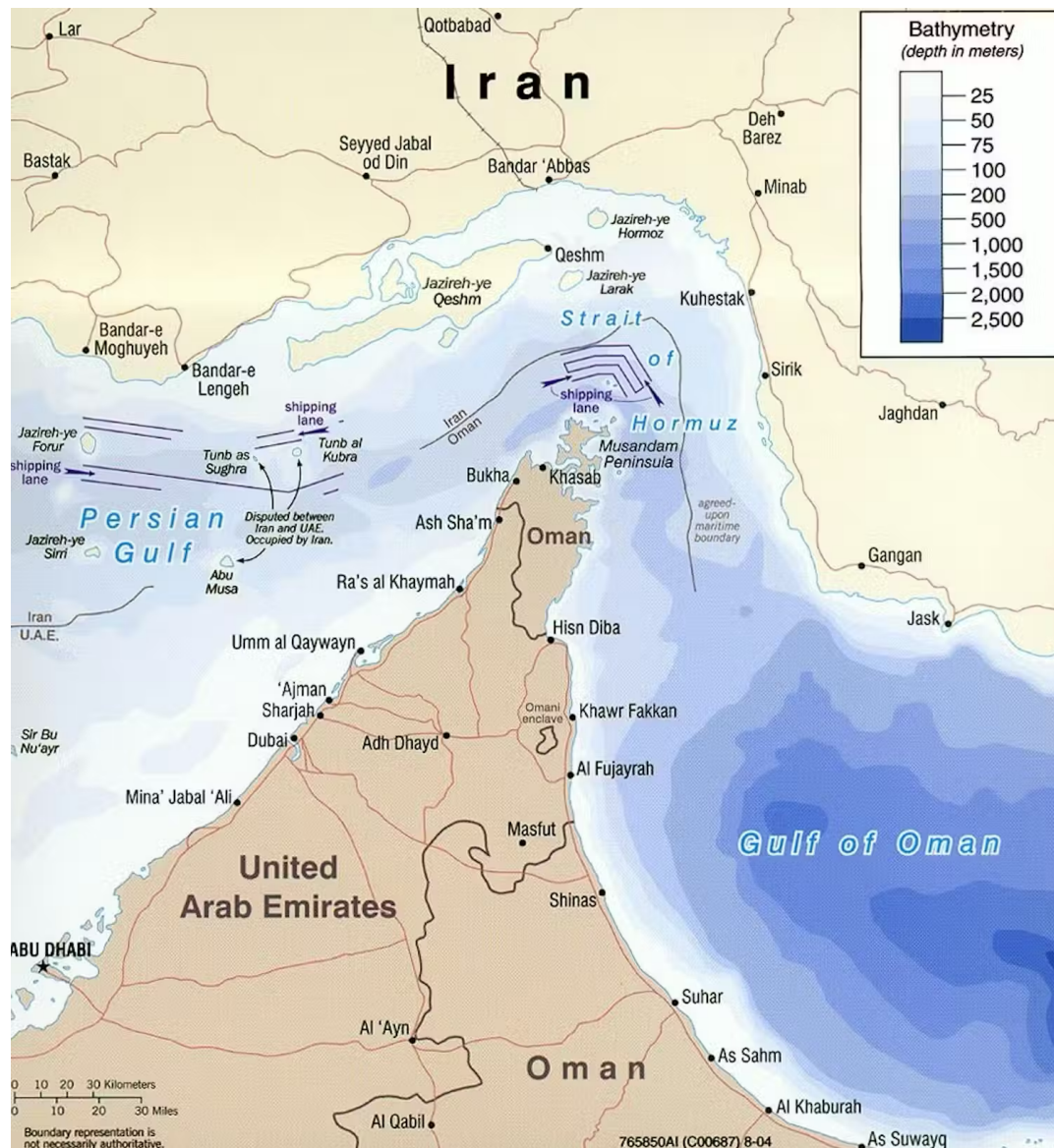
US warship Thomas Hudner launches a Tomahawk missile as the American military strikes targets in Iran, March 1 2026. U.S Navy/U.S. Navy Photo/Alamy Live News

As consequências económicas da guerra no Irão (6) [FONTE: Sarah Schiffling / The Conversation, 1/03/2026]

The reported sinking of several Iranian warships **by US missiles** in the Gulf of Oman serves as a reminder of the maritime aspect of the conflict which began February 28 with a barrage of Israeli and American missiles targeting Iran. Two other vessels, believed to be tankers, have also been **reported as having been hit** by missiles, of an as yet undetermined source, in the vicinity of the Strait of Hormuz, underlining the importance of this vital shipping lane – which is likely to play an key part in all sides' calculations.

Full details have yet to emerge of the incidents. But there are already signs that the strait will become a major focus of concern because of the huge implications should the conflict disrupt maritime traffic through this the narrow outlet of the Persian Gulf. Ships crossing the Strait of Hormuz carry around **one-fifth of global oil supplies**. That's about 20 million barrels per day. This makes the strait the most critical energy chokepoint.

As consequências económicas da guerra no Irão (7) [FONTE: Sarah Schiffling / The Conversation, 1/03/2026]



As consequências económicas da guerra no Irão (8) [FONTE: Sarah Schiffling / The Conversation, 1/03/2026]

There are a small number of strategic passageways, or [chokepoints](#) on which global trade depends and which are vulnerable to disruption. Any disruption reverberates instantly through global markets and supply chains. With conflict raging in Iran and attacks across the Middle East, traders, governments and businesses will be watching oil prices closely as the markets open.

After Israel and the US launched attacks on Iran on February 28, prompting retaliatory strikes across the region from Iran, Tehran broadcast to vessels in the region claiming that the [Strait of Hormuz was closed](#).

Although the shipping lanes are only about [two miles wide](#), actually physically closing them would be difficult to achieve. The most decisive action Tehran could take would be to [mine the shipping lanes](#). With the large US naval presence in the area, this would be very difficult for Iran to achieve.

But a formal blockade is not necessary to stop traffic. When perceived threat levels rise, ships stay away. Big shipping companies such as [Hapag Lloyd](#) and [CMA CGA](#) have already suspended transit through the strait and advised their ships to proceed to shelter.

As consequências económicas da guerra no Irão (9) [FONTE: Sarah Schiffling / The Conversation, 1/03/2026]

Supply chain disruption

The **main destinations** for oil and gas flowing through Hormuz are China, India, Japan, and South Korea. India, which imports about half of its crude oil through the strait, has activated **contingency plans** to safeguard energy supplies.

But apart from amassing strategic national stockpiles to weather immediate disruptions, there may be limited alternatives for countries dependent on getting their energy supplies through the strait. Saudi Arabia and the UAE have some pipelines for both oil and gas that can bypass the Hormuz. There is an **estimated spare capacity** of 2.6 million barrels per day for these pipelines. But that's a fraction of what is normally shipped through the strait.

Oil and gas are traded globally. So even countries whose energy needs are not met by imports from the Persian Gulf will be affected by price increases. **Oil prices** are expected to increase to up to US\$100 (£74) per barrel when markets open on Monday. Opec has agreed to **modestly boost oil output** in a bid to stabilise markets. But the group of oil producing countries has limited options as key members are affected by the fallout of the attacks on Iran.

As consequências económicas da guerra no Irão (10) [FONTE: Sarah Schiffling / The Conversation, 1/03/2026]

Energy price increases will hit consumers directly when filling up their cars or heating their homes. They also affect companies across a wide range of industries. This has the potential to cause further supply chain disruptions.

Supply chains rely on predictability. The persistent geopolitical uncertainty has complicated operations worldwide. Limited alternatives make the de facto closure of the Strait of Hormuz all the more impactful. The longer the disruption persists, the more significant and structural the economic damage will become.

Potential for escalation

There is still a potential for a catastrophic escalation in the Strait of Hormuz. The sinking of a tanker would have dramatic consequences for the environment and would likely halt navigation for an extended period of time.

But prolonged instability may also prove destructive for the global economy. Previously, [Iran closing the strait](#) was seen as unlikely considering the global backlash and economic harm to Iran itself. But with regime change now the stated goal of the US-Israeli attacks, the cost of holding the world economy hostage might seem justified to the rulers in Tehran.

As consequências económicas da guerra no Irão (11) [FONTE: The Economist, 1/03/2026]

War in Iran could cause the biggest oil shock in years

Prices will surge in the short run—and may stay high for a while

Mar 1st 2026



Photograph: Getty Images

As consequências económicas da guerra no Irão (12) [FONTE: The Economist, 1/03/2026]

PRESIDENT DONALD TRUMP likes to launch his military campaigns on a weekend. In June, during a 12-day war started by Israel, American forces bombed Iran's nuclear sites on a Sunday. They captured Nicolás Maduro, Venezuela's former dictator, on a Saturday in January. And they hit Iran again on February 28th, a Saturday, in dozens of strikes co-ordinated with Israel that killed Ali Khamenei, Iran's Supreme Leader. One theory is that Mr Trump deliberately pushes the button when oil markets are closed, to let the dust settle and prevent prices from going haywire. If so, it is unlikely to work this time.

Markets were already nervous before the weekend. On Friday oil closed at \$73 a barrel, the highest since July. This was about \$10 above what supply-demand fundamentals would justify, says Tom Reed of Argus Media, a price-reporting agency. At the start of the year many analysts expected an oil "superglut", caused by rising supply in the Gulf and elsewhere amid tepid demand, to push down prices towards \$55 a barrel. In early February the International Energy Agency, an official forecaster, predicted a supply surplus of 3.7m barrels per day (b/d) on average for 2026.

As consequências económicas da guerra no Irão (13) [FONTE: The Economist, 1/03/2026]

Instead, rising tensions in the Gulf, together with tighter Western sanctions, have this year caused prices to rise by around 20%. Regional conflict and, in particular, a blockage of the Strait of Hormuz—which carries around 15m barrels per day (b/d), roughly a third of global seaborne flows—could push prices towards \$100.

In the hours after Israel's initial [attacks last summer](#), Brent crude, the global oil-price benchmark, jumped by 7% to \$74 a barrel—a reasonable jump, but not a huge one. That campaign largely spared Iran's energy facilities and the country's exports, which account for 4% of global seaborne flows, are not vital to global supply. America's intervention was brief; Iran's response, symbolic. Within days prices fell. This time, Mr Trump says, "The heavy and pinpoint bombing...will continue uninterrupted throughout the week or as long as necessary to achieve our objective." And Iran's retaliation is far more serious. In the past 24 hours it has rained missiles on Israel, its Arab neighbours and American bases in the region.

None of this is going to calm traders. How panicked they get, and for how long, will depend on three factors. The first is what Iran targets next in the Gulf. Initially its strikes, which it has described as self-defence, hit only American military assets. Since then they have also reached ports, airports and other civilian infrastructure across the region.

As consequências económicas da guerra no Irão (14) [FONTE: The Economist, 1/03/2026]

Faced with an existential threat, Iran's leadership—or what remains of it—may see dragging [its Gulf neighbours](#) into the crisis as one of its few means of forcing America back to the table. Several oilfields in Saudi Arabia, the United Arab Emirates (UAE) and Kuwait are within range of Iranian missiles and drones, notes Carlos Bellorin of Welligence, a consultancy. They are sprawling and so hard to defend.

Taking aim at oilfields would be reckless. An Iranian attack on Gulf oil would invite retaliatory strikes from neighbours, which first called for de-escalation. In the early hours of the campaign explosions were heard near Kharg Island, from which most of Iran's oil exports depart, though they appear to have targeted infrastructure other than oil terminals. Things could get much noisier there.

Even if output is spared, the second unknown is whether it can get to market. Hormuz has never been closed to maritime traffic, even during the Iran-Iraq war in the 1980s. Choking it off would antagonise China, which buys nearly all of Iran's oil and receives 37% of its seaborne crude imports through the Strait.

Iran seems intent on cutting off the strait anyway. On February 17th, during nuclear talks with America, it closed the narrow conduit for a few hours for live-fire naval drills as a demonstration. On February 28th the Islamic Revolutionary Guard Corps (IRGC), the regime's praetorian guard, broadcast warnings that shipping through the strait was no longer permitted.

As consequências económicas da guerra no Irão (15) [FONTE: The Economist, 1/03/2026]

Enforcing that threat will be hard. American forces would probably dismantle any blockade within hours. Yet the strait is fast becoming unnavigable anyway. Satellite jamming is disrupting ships' signals, raising the risk of collisions. Iran could deploy mines to make navigation even more hazardous. In the early hours of March 1st the *Skylight*, a Palau-flagged tanker blacklisted by America, was hit by a rocket off the coast of Oman.

Insurers are jacking up rates or cancelling policies altogether for vessels attempting the journey. At least five giant tankers, which were due to transit Hormuz to pick up oil in Saudi Arabia, Oman, Qatar and Iraq in early March, made U-turns on the afternoon of February 28th, says Kpler, a ship tracker. Vast clusters of idling tankers, wary of crossing a war zone, are forming on both sides of the passage. Already high freight rates could rise further.

Alternative routes are of limited use. Saudi Arabia can redirect barrels via its East-West pipeline; the UAE has a smaller conduit bypassing the strait. Even at full capacity, however, some 8m-10m b/d would remain exposed, estimates Jorge León of Rystad Energy, another consultancy. During a previously planned meeting on March 1st OPEC and its allies raised output only modestly. Saudi Arabia and the UAE have the most spare capacity in the cartel. If they cannot ship their barrels, the remaining members cannot make up the difference.

As consequências económicas da guerra no Irão (16) [FONTE: The Economist, 1/03/2026]

What happens to prices in the longer run is contingent on the third and biggest unknown—whether Mr Trump can achieve his stated aim of engineering regime change in Iran. With the mullahs and the IRGC gone, the country would cease to be a source of regional instability. It could count on relief from sanctions which curb its participation in global markets. A combination of rising Iranian exports and ebbing geopolitical risk could reinforce the superglut and make crude even cheaper.

Although Mr Trump seems to be ruling out American ground troops in Iran, and no country has ever been liberated from tyranny [by air power alone](#), the situation is uncertain enough to allow for such a happy outcome.

The [alternative scenario](#) is that the hardliners remain in charge. Whoever claims Khamenei's robes may feel compelled to make a show of force by keeping Hormuz closed and sowing chaos in the Gulf. With rival factions of the IRGC jostling for power, Iran would remain a regional menace. Its oil output could decline and buyers such as China would be unsure who in Iran controls the spigots. A risk premium of \$8-12 a barrel could remain a feature of global markets indefinitely.

As consequências económicas da guerra no Irão (17) [FONTE: The Economist, 1/03/2026]

In November Americans will vote in midterm elections. Mr Trump and his Republican Party are unpopular at home, in part because they are seen as not doing enough to bring down the cost of living. Higher prices at the pump will make them less popular still. According to the Dallas Federal Reserve, a \$10 rise in the price of Brent typically lifts the price of a gallon of petrol by 25 cents, sometimes within days. It takes much longer for petrol stations to reduce their prices when that of Brent starts falling.

Mr Trump could speed things along by tapping America's Strategic Petroleum Reserve of 415m barrels. That is what Joe Biden, his predecessor, did after Russia invaded Ukraine in 2022. But back then the reserve held nearly 570m barrels. At its maximum draw rate of 4.4m b/d it now would last three months. The uncertainty unleashed by the war in Iran could linger for much longer. Traders should brace for many anxious weekends to come. ■

Bibliografia

IRAN'S RISE AND RIVALRY WITH THE US IN THE MIDDLE EAST



MOHSEN M. MILANI

The Oil Crisis

Fiona Venn



history *hist'ar-i*, *n* an account of an event; a systematic account of the origin and progress of the world, a nation, an institution, a science, etc; the knowledge of past events; the academic discipline of understanding or interpreting past events; a course of events; a life-story; an eventful life, a past of more than common interest; a drama representing historical events. — *vt* to record (*shakesp*). — *n* **historian** (*his-tö'ri-an*) a writer of history (*usu* in the sense of an expert or an authority on).