

The geopolitical world we have has reached its limits

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There is a theory that the world's politicians are relying upon at present, which is that "Trump always chickens out".

The logic is that a President who loves to threaten, and who rarely delivers because he changes his mind before any deadline is reached, will not, as he threatened on Saturday, obliterate Iran's energy systems if they do not reopen the Straits of Hormuz by the close of play today.

There are three problems with this theory.

Firstly, sometimes Trump does not chicken out.

Secondly, on this occasion, the choice may not be within his control. Israel might do what he has threatened; it appears that he has very little control over them.

Thirdly, Iran might force the issue by outright refusal, or by direct military action of its own to indicate its disagreement, and Trump may, as a consequence, have backed himself into a corner from which he cannot see an exit.

What happens then? If the USA does attack, as threatened, Iran has said it will take out the energy facilities in Gulf states such as the UAE, Qatar and Kuwait in retaliation. There are few who now doubt that they still have, despite the bombardment they have suffered, the capacity to do this.

The scale of the consequences is hard to describe. They might not be Armageddon, but they would be cataclysmic. In world history, they would be seen in retrospect as a pivotal event in humankind's development. To suggest that is not to exaggerate. It is to put the threat that we face today in context.

We have built a world based upon oil and gas. The destruction now being threatened would remove between 20% and 30% of oil and gas supplies for the next 10 years, during which period these resources would have to be rebuilt, presuming that sufficient political stability could be created to enable that possibility, which is itself a massive

unknown.

The reality is, therefore, that if Trump does not chicken out, and presuming that Iran is not going to change tack, as seems most likely, then we will see an act of economic devastation potentially unprecedented in human history. That is the scale of what might happen.

As it is, the head of the International Energy Agency has suggested, [according to The Guardian](#), that politicians worldwide have underestimated the potential impact of issues already arising from this war. These would, however, appear almost inconsequential if this new attack were to happen.

So what can we do about this? The precise answer is absolutely nothing. We live in a world where events beyond our control are happening. We have a war where fascists are fighting each other, and I put all three of the major combatant parties in this war in that same category. All of them are now theocratically-inspired, semi-democratic at best, fascist states where the power of might is worshipped, and respect for the “other” is minimal, at best. Of the three, Iran was being contained until Trump arrived on the scene. That, however, was insufficient for Netanyahu and Trump, who have deliberately promoted an illegal war that might deliver a catastrophe.

What would that catastrophe look like? Let’s start with the one consequence that most people will forget, which is that this will create a climate catastrophe because of the releases of oil and gas that will arise as a consequence of the destruction.

Then let us consider its immediate geographic consequences, not least in an area where the majority of people are utterly dependent upon desalinated water to survive, and where the risk of power disruption will put them into immediate jeopardy. There could be an immediate, massive humanitarian crisis if the power supply to these desalination plants is destroyed, as is likely.

Whatever happens, because of the destruction of the means to a livelihood for many in the region, a refugee crisis is likely to follow from this action, with those people seeking refuge in a world which has now been primed to be more hostile to refugees than has ever, historically, been the case. No one can guess the potential consequences of that.

After that, there is, of course, the consequence for the world economy. Oil and gas supply destruction on the scale that is possible would have massive consequences.

Some parts of the world might become uninhabitable quite quickly. The economic ability to sustain life in extremely cold and very hot regions might be threatened.

Across the world, countries dependent upon imported fuel will face potentially massive trade deficits, which will totally destabilise them as jurisdictions.

Simultaneously, remaining oil and gas producers will be unjustly enriched, increasing

the risk of global political instability, although the precise manner in which this might occur will be difficult to forecast, given the enormous disruption to supply chains for many essential products.

If the spillover from energy feeds into fertiliser supply, as is possible, unprecedented levels of famine are also potentially on the cards.

To apply probabilities to any of these outcomes is impossible. We are talking about a situation of genuine uncertainty here, which makes imagining the risk a near impossibility in its own right. I have probably only scratched the surface with the suggestions I have made, but three things are clear.

We face the risk of a massive humanitarian crisis in the short term.

In the mid-term, we face the risk of a major refugee crisis.

And all of this will happen in a period of massive economic disruption as a consequence of a shortage of energy, the possibility of which has never been considered and for which we have no plans for adaptation, which will in turn give rise to potential risks of isolationism and protectionism that can only exacerbate the first two crises.

Right now, the hope is that this risk can be avoided.

But remember, if the risk is avoided today, it does not go away. Trump might talk about declaring victory instead, but we know that that would just be rhetoric. There is no victory to be had here, not least because Trump is in many ways the minor participant in this conflict. Israel is the major aggressor, and against all the perceived odds, Iran retains the capacity to defend itself and counterattack, which means that the opportunity for Israel to also back down would appear to be denied.

What happens next? I do not know. I do know there are lessons to be learned.

The first is that we must not allow fascism.

The second is that the USA and Israel must now be treated as the pariah states they are. They are not our allies. They are, in a very real sense, because of the threats that they pose to our well-being, our enemies. The toxic politics they both represent have to be openly and directly rejected.

Thirdly, the warning has been given, and it is that we need to prepare for a world without oil and gas. We have known this for a long time. We have done nothing about it. The moment to transition to a sustainable world has arrived. Whatever happens, we have no choice but to do that now.

Fourthly, we also have to reimagine how we live. The excess that has characterised some aspects of life for many in the West is not sustainable. This, too, is something that

we have known for a long time. Now is the time to embrace that fact.

The only options we are now being given are to make these transitions in a disaster situation or through careful planning. The end destination has to be a different world, whatever happens. The geopolitical one we have has, in almost every imaginable way, reached its limits. That is the only thing I can say with certainty this morning.