

# Transcript — The Evolution of the Iran War

**Christian Smith:** Foreign. Hello and welcome to this podcast from Geopolitical Futures. I'm Christian Smith. The US Israeli war with Iran is two and a half weeks old with no end currently in sight as attacks on Iran continue. Iran itself appears set on applying pressure wherever it can and it is so far successfully making the war as difficult as possible, possible for the rest of the world. So on this episode of the podcast I am joined by Geopolitical Futures chairman and founder George Friedman as we discuss U. S war aims, the price of oil, mission creep, and just how long this might carry on for. George, how are you?

**George Friedman:** I'm fine. How are you?

**Christian Smith:** I'm all right, thanks. I'm all right. Do you still think we talked about on the podcast a fortnight ago or so about US War aims and what they were going into this for? Do you still think that this war is about destroying the nuclear program and the regime of Iran, or is it more now about destroying conventional military capabilities?

**George Friedman:** Well, all wars evolve. The fundamental purpose of this war was to neutralize the nuclear program of Iran and also to have regime change. Now the fundamental problem with war is that it's unpredictable. Geopolitics as a whole is like macroeconomics compared to microeconomics. The broad outline of the economy can be seen to some extent. The details, the engineering process of economics is much more difficult to predict. This is same is true with geopolitics. That the United States would try to stop Iran from having nuclear capability was predictable. Given our fear of their attacking the United States in various ways. The way in which the war would be fought is a more micro question how it was fought. So what we have seen is the regime was destroyed at the first strike. And that was a surprise in the sense that the administration believed that the Iranian government system seemed to be very similar to others. Destroy the prime minister, destroy his aides, everything else the regime as they understood it was destroyed. But they did not understand that that was not the full nature of the regime. Something else was in place and that was the irgc, this Islamist force that not only had the power over the military, but had massive economic and other power in the country. By destroying what they saw was the regime, these civilian administrators, they did not destroy the governing force inside of Iran. That was the irgc. The IRGC persisted on surviving and in fact they were more resilient than we expected. They have something called the Mosaic force, a force in which different areas are able to operate outside the command of the center. So in other words, they are decentralized and therefore much more difficult to destroy, yes, the government, the official part that meets in the United nations and so on, was

gone. But the true power in Iran was the irgc. And the IRGC remained very much in place, able to close the Straits of Hormuz and carry out other attacks. In other words, while it could be predicted that the United States would. Would try to destroy the nuclear capability, Iran, the view that if we destroy the ruling government, Iran will collapse or capitulate or something showed a fundamental misunderstanding. Therefore, where geopolitics could predict that there would be an attack, how it would go in the war, how it would proceed was much less predictable. And in this case, there was a mistake made, I think.

**Christian Smith:** What do you mean by that? What do you mean by mistake?

**George Friedman:** They thought that if they took out the regime, there would be an uprising in the country and a new regime would be inserted. This was a reasonable thing to believe based on the fact that in the months prior to the attack, there had been many demonstrations against the regime in the streets and many people died. The government killed him. So the assumption was that if the regime, this government, was out of the way, a new regime would emerge from the people who had opposed him and take their place. In fact, there was another regime, a more powerful regime than the civilian government, which was the irgc, the. The Islamic Revolutionary Force, and so on. And that was something that I don't think was anticipated. I think it was thought that if the civilian government was destroyed, there would be an uprising and the president called for an uprising and a new regime would emerge. In fact, Iran turned out to be far more resilient than was expected. And we are now in the United States facing how to continue this war based on the realities we now encounter.

**Christian Smith:** And what do you think they are aiming for now? What are the goals of the U.S. of course, Trump sort of has been criticized for saying many different things in terms of goals. Arguably, this is just part of his way of distracting people from exactly what he's trying to do. It's a matter of just of communication and distraction. What do you think the actual goals are now? Or are they still figuring these out?

**George Friedman:** Well, one of the things we have to be very careful of is thinking that Trump himself provided the intelligence for what was regime change, that he himself designed airstrikes as a fundamental way to do this. Presidents don't do that. And I don't think this president or any president is capable of developing either a political or military strategy on zone. So there was clearly an intelligence failure about how Iran ran. It is possible that the President was told this and dismissed it, but there's no evidence of it. There was also belief, very interesting belief, that it could be done with simply air power. By air power, I mean drones, missiles, and aircraft. And there was never a time when air power alone was able to

force government into capitulation, save in Japan, where the air power was used as atomic bombs, and that Japan had already lost that war, that it was over. In this particular case, there was an assumption that we could fight this war without engaging on the ground. Now, that would be what Trump would want to hear. But you're also assuming that the mil. That's what the military told him or didn't tell him or something. So I think the focus on Trump himself. He is the president. He's responsible for all of this, and that's all appropriate. But I think that the understanding that we had of Iran was a systemic failure. That is, the intelligence community misunderstood it. That is, the military had a simplistic model of how the war would be fought. There were many people involved in this mistake. Was Trump responsible for the decision? Yes, but I don't think. I'm not sure that he alone arrived at this strategy or this intelligence analysis.

**Christian Smith:** And what do they want now, do you think, then, or are they unsure?

**George Friedman:** Well, what they must do is destroy the irgc. And the IRGC is in such a situation that while it has a central command structure, it is also structured so that the regional commanders continue to take force. And we have to remember that it's not just a military force, but it's deeply involved in the economy. It is very powerful in terms of internal security. And in a certain very real way, this was the real regime in place. Is the real regime in place? And destroying it simply from the air is. Is going to be very difficult. Also that the IRGC has drones and missiles of their own and can throw them back. So now there has to be a reconsideration. First, do we continue this? It's very difficult to back out of it. Second, how do we execute this war? And the fundamental problem being faced by Trump, and this is Trump's problem, he swore that we would not be engaged in wars in the Eastern Hemisphere. This was one of his fundamental piece, and this was a necessary thing to believe. He is now facing a war in which it is possible that cannot be won without ground forces being put in place. Iran is a massively large country. The IRGC is a massively large force, quite professional, apparently. And therefore, the one thing that he didn't want to do, he now has Facing a problem, he must do it if he's going to win. And that's not going to be a short thing. It appears

**Christian Smith:** We. We hear a lot. Let's come back to that in just a moment, George. But we hear a lot about from the White House about how much of Iran's military has been destroyed, obliterated, that sort of thing. That may be true, that they're running out of targets actually to hit as well. That may be true, but that doesn't necessarily solve the problem, is what you're saying.

**George Friedman:** Well, what I'm saying I don't think is true, because if it collapsed war, we're still seeing missiles launched, even in countries like Turkey. They're not involved. Various other countries are being hit. Now. The amount of attacks coming from the IRGC to other countries has declined. So there seems to be a dramatic decline in the amount of capabilities they have. They may be running out or they may be hoarding them, waiting for something else that I don't know. I would hope that our intelligence services know. But what basically the assumption is, you can assert that in fact they have destroyed all the forces on the ground. This still is a question. We now have to take out their nuclear capability. So if you say that the nuclear program was not in the hands of the formal government, but in the hands of irgc, crippling in a few weeks, the irgc, a mass and vastly dispersed force, would seem to be more difficult. So presidents claim things all the time. Sometimes they're true, sometimes they're not. Nevertheless, there's reality out there.

**Christian Smith:** Well, one reality, of course, is the nuclear side of things. And as we talked about a fortnight ago on this podcast, the nuclear side of things is probably or has been really the trigger in many ways for what's going on here. At the same time, the administration is sort of saying now that they're less interested in, say, for example, taking control of the enriched uranium, the 900 pounds or so of that uranium that Iran has. Again, this could be misdirection. You don't exactly tell people publicly what you're trying to do tactically in a war. Do you think that's still on the cards, though? I mean, where does that go from here? In Iran, with 900 pounds of enriched uranium is a dangerous thing.

**George Friedman:** The nuclear thing was the trigger for the war. It was assumed that it could be carried out in a surgical operation first. It failed to do so completely. But in this one, that we would damage the government so badly that it couldn't function and carry that out that proved to be not fully the case. The formal government was destroyed. The IRGC remained, and the IRGC responded in a way that might have been expected, but wasn't, which is they closed the Straits of Hormuz. The Strait of Hormuz blocks the Persian Gulf. The Persian Gulf is one of the main producers of oil in the world, of energy in the world, therefore. And at the moment, the question is, is it safe to get through the Straits of Hormuz? Can the IRGC close the Straits of Hormuz by standing off with drones and destroying ships? This is now the fundamental question for the moment. At the same time, the nuclear question doesn't go away. That remains there. But there is now two issues. One issue is uranium. The second issue is oil. And I don't think this was anticipated. I'm not sure I would have anticipated it. But you say to Trump, anticipated? Yes, Trump may have, but so the people around him, which is that the IRGC was capable of blocking that Gulf, which in turn created a massive crisis in oil and energy

generally on a global basis. So the first goal may remain intact about the uranium. But there's now another issue at this point that it would seem to me that the administration, Trump and beyond, did not anticipate.

**Christian Smith:** Take a moment to follow and rate us on your preferred podcast platform. For video versions of the show and much More, subscribe on YouTube [eopoliticalfuturesgpf](#). Click the link in the description below to gain access to our full 2026 forecast re anchoring the world, complete with geopolitical predictions, maps and graphics from our global team of analysts. Yeah, well, let's talk oil, George. I mean, can other. Well, let's start with a broader question of, of. Of where countries can get their oil from now, given, given the situation there, can other oil sources be brought online effectively and eventually to make up for this? Or is the Strait of Hormuz being closed a sort of exist for the world's oil markets?

**George Friedman:** As we've learned, there is an international Energy administration that has large reserves of oil and they've released a good amount of this, which means that we will have oil prices rising. But to some extent it's not going to be a fundamental breakdown of the global economic system so long as a solution is found to the Straits of Hormuz and therefore to the oil flowing from it. So I don't think we are in imminent danger, if by imminent you mean days or weeks away from a catastrophe because of those reserves and because other countries have the ability to increase to Some extent the amount of oil, but at the same time, in the long run, going out a month or two or three, we're really looking at a fundamental problem. The Straits of Hormuz are not opened. And therefore a new military problem, apparently unanticipated, emerges, opening the Persian Gulf through the Straits of Hormuz, which is not an easy thing to do, since IRGC is able to launch missiles or drones against ships coming in from fairly far out, about hundreds of miles. So we now have to take a look at the dispersion of these drones and weapons in a way we didn't before, and have to take a look at it broadly now. This then poses a fundamental question. Air power can destroy the drones that are there. If there are more drones, they can be put into position and continue the attack. Two things have to happen. The drones have to be destroyed and the forces that are blocking the Straits of Hormuz destroyed as well and kept open. And therefore, that involves potentially inserting troops on the ground, which is the one thing that Trump himself did not want. An other endless war with casualties and so on. He wanted an antiseptic war. Take out the government, take out whatever's left, scatter them, and so forth. The Straits of Hormuz problem may be soluble without forces on the ground, but I suspect that the very best it will be held open only with forces on the ground, in which case they're subject to attack, to casualties and presence. For how long, we don't know. And this is the problem. The Straits of Hormuz, which we didn't

anticipate because we didn't understand that the IRGC was a government in itself, and destroying the civilian government did not destroy in any way the ability of Iran to resist.

**Christian Smith:** I'm interested from a geopolitical and a geoeconomic perspective. The world is so globalized now. We're all dependent on each other. We learned that the hard way during the COVID 19 pandemic and then again in part during Russia's invasion of Ukraine. A war is just now much more damaging to global markets than they were before and is making war, particularly in strategic areas just now likely to be restricted more by economic factors like this than it would have been, say, 50 years ago?

**George Friedman:** Well, I would say 80 years ago. It was much greater. World War II was devastating to the global economy. Okay. And other wars as well had some impact. This war does not necessarily have to have an impact on the economy if the straits are opened. The problem here is keeping the straits open requires, it seems to me I'm not certain about this. Seems to be an extended presence of troops on the ground, possibly engaging the irgc. And we find that the IRGC is very difficult to defeat. So in this case, because oil is a fundamental element, because there are limits to the amount of production we can have outside of this region, and this region is a fundamental element of the world's oil supply, we are hitting very differently. But it's not something that's unprecedented, save that in this particular case, the lack of oil in the world is a singular problem because oil is fundamental to the global economy. There's not a new thing in war. It's peculiar to this war, not necessarily to the nature of war itself. At the same time I'm stating this about the irgc, I may well be overestimating them. When you get down to the engineering level, when you take a look at war, you have to look at very serious details. The broader prospect that the United States does not want this country to have nuclear weapons and therefore will act to stop that. This was predictable. This also, I think, should have been predictable if you looked at it closely. And we didn't because we didn't understand the IRGC either. So I'm not going to claim that I understood the IRGC and they were stupid, but the irgc, the structure of the IRGC was misinterpreted by myself and as well as others. So now this particular war is not a model for future wars because they'll be in different places elsewhere. At the same time. It is a fundamental problem that the president faces. Whether he is personally responsible for the misadventure in terms of intelligence and strategy or that others are, he's still going to be held responsible and he has now a deep political problem that he has to deal with and fairly quickly.

**Christian Smith:** Well, let me put you on the spot, George, and you're not a government advisor, but if Donald Trump and Pete Hegseth hauled you into the Oval Office tomorrow and said, George, we've got this problem. The IRGC is going to be hard to eliminate based with

airstrikes and we've got the issue with the Strait of Hormuz. What do you think we should do now?

**George Friedman:** Well, the first thing I'd say is I don't have that kind of intelligence. I would hope that the various intelligence organizations in the Department of Defense and the CIA have far better intelligence than I do. My view is that the IRGC turned out to be more politically powerful and militarily powerful than was anticipated. I don't know how much more powerful I don't know how I would seek to defeat them. They may be far less powerful than we fear. But if my fears are correct and they're just fears, they're not stating a fact that the IRGC is capable of providing both a fundamental defensive capability at the same time as being able to, for some period of time, block the Straits of Hormuz. It would seem to me that the only thing that we could do is make peace, which is going to be a very difficult thing to do for all sorts of reasons. And secondly, to figure out a way to defeat them, the IRGC, if not everywhere, at least on the Straits of Hormuz and the Persian Gulf region, forcing them elsewhere. There's also a point to be remembered, which is there's another army, the Artes, which is the army that emerged from the Shah of Iran. It is not ideological in nature. It is fairly large, and it is said to be hostile to the IRGC, which is a different form. It does not appear the United States has attacked this army at all. It also does not appear these armies engaged in any of the resistance that we're seeing. Therefore, one of the most important things, and this is very odd because this is unique to this country, this other military force, I don't know how well armed it is or. But it is coherent and it's there, and it is essentially secular. And the IRGC isn't. If this force could be brought into the operation if it chooses to, if it believes it can and is rewarded properly, this is another tool that could be used by the United States if they were willing to become a tool of the United States. And this is the mystery. So Artesh is his army that is secular, a professional army, and is said to be quite good, and that does not appear to have been attacked by the Americans. So they seem to have it in some different view. If this army were to intervene and were able to engage the IRGC, if it had the capability with the help of the United States, perhaps this might add a different dimension. But this points out the chaotic level of engineering that is below the very orderly geopolitical level that I work on. Beneath that is the application of geopolitical reality, which can, and in this case has turned out to be quite unstable and chaotic and not at all anticipated by the United States. That does not mean the United States can't reorganize itself for this working with this army. But then it really depends on this army not to have to put troops on the ground. And I just don't know enough about this army. Most people I've talked to don't know enough about it to see what it'll do.

**Christian Smith:** It's fascinating, isn't it? So you're almost suggesting that this is now a war on the irgc, but not on Iran, so to speak. In respect of the artes,

**George Friedman:** Iran is a large, large country. It's a very complex country. It is divided into ethnic groups. For example, most of northern Iran is settled by Azeris, people who are in Azerbaijan, a smaller country to its north. And they're different community than other communities. It is divided into many of these ethnic groups. It is also divided between this army of the nation and the irgc, the army of ideology. And there are many ways in which it is possible to manipulate this weakness in Iran. But it has to be remembered that the occupation of this country, this is a huge country, occupying it, pacifying it, is something that is the last thing going counter to everything that Trump wanted. It would be an extended war. So at this point, the problem is air power has only so much effect. If the Iranians run out of drones, run out of missiles, they are then vulnerable and can be treated if that happens, or we can destroy or their capabilities. But they are so vastly distributed, it's going to be very hard to achieve this, but not impossible. So I think the next question on the table is twofold. One, do the Iranians have the number of weapons they need or can they produce them, which I don't think they can? Secondly, can we open the Straits of Hormuz before we run into a massive economic crisis globally? So these two things have to be answered. They link together, but it's not clear.

**Christian Smith:** George, let's look more regionally as well. In terms of the other Gulf states, it seems we had the odd situation recently where the Iranian president promised not to attack any more Gulf states. The IRG somewhat disagreed with that. It seems broadly now that a lot of those attack happening on US bases rather than necessarily on the states themselves. Broad, more broadly, geopolitically, the US Strategy under Trump and, and in large part before as well, has been burden shifting, has been trying to get regional players like Saudi Arabia and Turkey in, in the Middle east to take over their responsibility for the region in large, to a large extent from the U.S. those countries, though, are very much concerned about unintended consequences from wars like this. They obviously worry about beyond the horrible nature that would be if there was a civil war in Iran, the consequences for refugees, for attacks on their countries, for oil exports, all those sorts of things. How does this affect America's desire to shift the burden onto regional powers. How does this, when there's a war ongoing that it is so heavily involved in and that those countries are not particularly happy with?

**George Friedman:** Well, I think initially these countries didn't mind it because they thought the attacks would be successful and they were fairly hostile to Iran. Okay. When it emerged that that wasn't going to happen, the idea that these countries have the ability to subdue Iran, when you take a look at the Gulf states, they're very small, sparse. The Turks, even though they

have had two missiles or three missiles fired at them, primarily the Incirlik Air Base that the Americans have in Turkey, have no desire to take over this role. So, Sussan, first, the region can't take control of Iran. They don't have the force. Secondly, they don't have the will to take it over. And therefore this is left as a fundamental problem. Given the fact that the civil government does not seem to be in control of the irgc, any settlement would require either the destruction of. Of the irgc, which I pointed out is difficult, and secondly, an attack on the ground to destroy the irgc, which would be exactly what Trump promised not to do, and so on. So at this point, there's a fundamental question, and that question is, does the IRGC have the capability of continuing fighting? They have fired many, many drones. They are now firing far fewer. As I said, that could mean they're running out of it or they're holding it in reserve. In any case, this is an intelligence matter, which I can't tell you what that means. It does mean, as I said before, there was a misunderstanding of what the government of Iran was misunderstanding, that if you took out the civilian government, the war would be over, they would have to capitulate. And that, I would say, was probably a massive intelligence failure to understand what was. Or it's possible that President Trump ignored them. I have no idea. All that I know is that I anticipated a US Attack based on the nuclear capability. I did not anticipate the nature of this war, how it would turn out. It's not my specialty, and it surprises me that this was not taken into account, but I'm not sure to blame.

**Christian Smith:** George, as always, thanks so much for your time. We'll be back again next week with another podcast. I imagine we'll be talking about many similar things as this war progresses. Thanks very much out there for listening. See you again next week. Goodbye. Find all of our expert geopolitical analysis@geopoliticalfutures.com.