

Transcript — Iran Update: The Strait of Hormuz

Crisis and the Future of War

Christian Smith: As we enter April and the second month of war in the Middle east, the US And Israel are still bombing Iran, Iran is still bombing the region, and the Strait of Hormuz is still closed. The ongoing closure of that strait is now causing panic amongst economists and energy and food experts, with talk of an impact worse than the COVID pandemic or the 1970s oil crisis. Meanwhile, Iran is running out of weapons and its people are suffering. Negotiations are underway. But with the Houthis joining the war and energy sites already being hit, is it already too late for the world economy? Hello, and welcome to this podcast from Geopolitical Futures. I'm Christian Smith, and today on the podcast, I ask George Friedman about the pressures facing Iran and the US Whether we really are on the verge of disaster and what the conflict tells us about the future of war. George? Hello. There is already a growing sense amongst many, particularly in the mainstream media, and particularly, I would say, outside the United States, in places like Europe, Australia, and New Zealand, that this conflict is becoming a disaster for the US The Strait of Hormuz is closed. There doesn't seem to be a good way to open it. Iran still has its nuclear material, and the regime has not collapsed. Do you agree. Do you agree that it's a becoming a disaster for the U.S. well, as

George Friedman: you said, we've ended the first month of war. Wars last usually much longer than a month or two. And whatever was promised here was that this would be over and very quickly. And it may well be because there are negotiations going on, but the outcome of war, each side expects to do better than the other. One side doesn't. So the question is, how does the war end? Does it end with a victory? Does it end with negotiation? But they end. And given the facts that you put out there, I think it will not be too long before this war ends, and I suspect there'll be negotiations.

Christian Smith: Do you think it's gone the way that the US Hoped it would or thought it would? Or do you think it has been something that has perhaps been a lot more difficult than they had planned?

George Friedman: Well, we have to begin by understanding why the US Went to war. The US Went to war because it feared nuclear weapons in the hands of Iran, a country that still harbors Al Qaeda, which was a force that led to the 911 disaster in the United States. A nuclear 9 11, or nuclear weapons launched by missiles at the United States would be catastrophic. The Israelis, of course, had even more fear of these nuclear weapons. Okay, now the question is, did

Israelis convince the United States to do this? I suspect that Donald Trump is not very good at being convinced of anything. I think the fundamental reason we went to war is we did not want Iran to become a nuclear power. Remember, we struck the nuclear facility in the first place to try to get it. We demanded, as a way to avoid the war, that the Iranians give up the nuclear capabilities, the uranium and so on. They refused to. So this was the fundamental issue of the war. So from Trump's point of view, there's an economic crisis, but there could have been a cataclysmic event if they had nuclear weapons. So the fundamental question is, will they win the war? Will the Iranians give up their nuclear capability? And if we remember why the war started okay, and what both the Israelis and the Americans were worried about. Israelis far more than the Americans. But still, the way it happened, we have to ask, how does it end? Well, it must end with them becoming denuclearized. And these are what the negotiations are going on about. Now,

Christian Smith: if the nuclear material is so important, why have, and I've seen people advocate for this, why have we not seen a ground force attack specifically on whether they believe the nuclear material has kept a sort of commando style raid?

George Friedman: Well, this is not a movie and it doesn't have that wonderful scene where the Marines or the Delta Force comes in. What happened in Venezuela was extraordinary and lucky. US attacked and took no casualties and captured Maduro. In the annals of COVID warfare of these sorts of actions, that's very rare. And Iran is a big country and it's able to defend itself against infantry forces. So when you land at that place, you're probably not taking in 300,000 men. You're operating with 20, 30, 40, 100, whatever. The Iranians have those people. So it becomes very difficult to stage these kind of fancy attacks where you go in flawlessly and take everything out. And so also, is our intelligence on where this stuff is located good enough to carry it out? And are they moving it around in various ways to drive us crazy? So we have, as the end, ending the new, the nuclear capability of Iran. At the same time, it doesn't seem clear that we can carry out a commando style raid successfully. And therefore we tried something else, which is essentially isolating Iran, accepting the idea that the Iranians are not going to be sending oil to the rest of the world and betting that the rest of the world can stand this longer than the Iranians can. And that's what's working itself out now. But we always have to remember why the war began. It began with a fundamental national security issue for the United States as well as Israel

Christian Smith: more broadly then, and not specifically for the purpose of obtaining the nuclear material. Do you think we could see ground forces sent in, whether that is Khag island or another island or something broader?

George Friedman: Well, I'm sure the guys in Special Forces are planning what to do and so on and so forth, but I'm also sure that it's under heavily defended circumstances of a sophisticated military force that is anticipating that attack. So whereas the attack on Venezuela and Maduro was not a complete surprise, but the manner in which it was done was profoundly successful because it was this rise to them, in this case, they're on high alert and have been. And so that sort of operation on the ground is unlikely. We could invade Iran, but Iran is a vast country. It's two and a half times the size of Texas, where I live, and that's really big. To take that country and occupy it would take just about all of the military capability of the United States. 10,000 men are nothing for that terrain. Plus, it'd be a very tough war. So from the American point of view, this war should end in negotiations. From the Iranian point of view, who are suffering quite heavily as well, there are negotiations going on, and the Pakistanis are key to that. And other countries have joined the negotiations, including Chinese, who I think are not there telling them, hold on, they're saying, we really need your oil. Make a deal. So that's where it goes.

Christian Smith: I read somewhere in the last few days that during Desert Storm, the first Gulf War, the U.S. had something like 750,000 troops. During the invasion of Iraq in 2003, they had something like 300,000 troops. And now. So 10,000 really isn't going to do much. Even an attack on Kharg island alone or something like that would really struggle with such small numbers in the tens of thousands, really.

George Friedman: And wars has changed since then. It is no longer infantry on infantry. Combat artillery used to be the thing, but it had to be brought straight up. At this point, there are drones, and they can be targeted from a thousand miles away. So the process of invading a country is very different than it was, say, 20 years ago. And even then we didn't do too well. So I think we have to be very cautious about thinking that we can deploy forces. We can in some cases, but that's a large country to deploy forces in.

Christian Smith: And we're gonna. We're gonna come on to what we can learn about the future of war from this current conflict soon. And it's also interesting. I mean, to point out that the concept of attacking an island, for example, is. Is, you know, history tells us one of the most difficult things, and as you've talked about many times with Taiwan, George, one of the most difficult things you can do. So the idea that because it's small, it's easy, it doesn't really hold mustard. Let's just talk about from the Iranian point of view now. What pressure is it facing then? Because some. Some are arguing there's very little incentive that it has to either give up its nuclear material or open the Straits of Hormuz because of the economic impact and pressure it will put on. I mean, what's their sort of view of the situation?

George Friedman: Well, in every war, there's a question of who's suffering more now in the world. At this point, there may be an impact on oil prices and rising prices that may not convince the United States or Israel that is a great enough force on them to stop. In terms of. Inside of Iran, you know, populations get very tired of wars, but normally it takes many years for that to happen. So in other words, it's very hard to understand what goes on in Iran. We know that before this, there were massive demonstrations against the regime. It may be that in Iran there's still unrest, or it may be the population, because of patriotism, now has rallied to the flag, given the way. But one of the things that the Iranians have to worry about apart from everything else is internal unrest, given the nature of the war, their own economic suffering because of the nature of the war, as well as the high casualties that are caused by the war. So apart from the military power on both sides is always inside the country. The element of where's the population? As in Vietnam, we were not militarily defeated, but inside the United States. Everybody got tired of the war. Iran seems to be an autocracy, but even autocracies can fall when the people are sufficiently unhappy. But this has only gone on for a month, and we're talking about wars that lasted years. And it would not seem to me likely that either side would be wanting such a war. So each side has a desire for the war to end in its favor, but I think each side would like to pay as little as they could for that favor, and therefore negotiations are taking place.

Christian Smith: The last time we spoke about the way that Iran had reacted to the war, the episode before last that we did on this, we spoke about the IRGC and the kind of US Intelligence failure about how the IRGC would hold together and its response to a conflict like this, Is it still holding together? Is it sort of proven itself that the irgc, the regime more broadly, isn't just going to collapse in the coming months?

George Friedman: The mistake that I said we made, we thought that the political leadership, Khomeini and those people were the government of Iran. Yes, they were formally, and in many ways they had influence over the irgc. But the IRGC is a military force that's highly ideological, highly committed, quite capable, and well armed in many ways. So the issue here is always they can continue to fight. Can the population bear the war? Is there any force inside the country that's anti war? Okay. And all these things are pretty much unknown. We assume that in this country there is no dissent, but we've seen dissent before. In fact, one of the things the Israelis said, probably incorrectly, certainly incorrectly, perhaps deliberately, was that there would be a rising in Iran. Now, that rising didn't happen, but it's not inconceivable, but not for a long time. It takes a long time for people to become bitter at a war.

Christian Smith: And you had, depending on the number that you're looking at, 7,000, 10,000, tens of thousands of people killed in the protests in January. It's a lot of people who would have been out on the streets now who no longer are able to be, and people who don't want to go out there because of that. I mean, do you think that Iran, we said at the top, you know, Iran is running out of weapons, drones, that sort of thing. But even then, do you think that Iran is really just in a position, the regime there, to just continue being smashed, as Trump would put it, and hope that the other side keels over first because of the pressure on them?

George Friedman: Well, there's food, there's clothing, there are all these things. And in wars, particularly this one, it'll be difficult transporting the goods and so on and so forth. But again, this is a long term thing. People can take a great deal until they suddenly realize that it's not going to end or it's not going to end well. And we're not at that point where the Iranians seem to be rising up, nor are we even the United States, where there's some anger about this war, a great deal of it, in fact. Are we at the point where the population is going to decide at this point? Both the IRGC's governance board and the President of the United States remain in control of the domestic situation. I think at this point, however, both are aware of the unrest somewhere possible and therefore As I said, wars end in one of two ways. In total victory, total defeat, or negotiation. And in this war, it would seem to me that the cost of total victory by the United States in terms of lives, money, everything, is much too high to want total victory. And the IRGC's ability to continue to govern Iran might be threatened by trying to do total victory just simply because the IRC would be destroyed. So in this case, yes, we're at a war, and ground forces are being threatened by the United States, but not in a way that we can really believe that it'll happen, except in very small scale. And so the question is fundamentally, is the United States and Israel together able to locate and destroy the drones that exist? Because it is drones that make them a threat. Okay. I suspect that there are going to be more drones available to the Iranians who can recite them. And its question is not can we destroy them? Given enough time, we probably could. How long can we endure the war? So it goes on both sides. How long politically within their countries can they carry this war out? And remember one thing, the Iranians are fighting for their country. We're not. And that always makes it a big difference. And that's what we should have learned in many of these other countries.

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and the role these nations play in regional power dynamics. Let's talk about Hormuz and the economic impact on that side of things. I'm sure listeners will have heard many different predictions about how bad things might get. I heard an interview actually yesterday with an Australian farmer who was talking about how he had about a quarter of the nitrogen fertiliser supply that he had that he needed for the coming season, and that would have. And that was fairly well reflected across Australia, which grows a lot of global supply of cereals and grains and things like that. And that could have a big impact on. On food. Here in the uk they're saying that food prices in supermarkets could rise by up to 8% or so. And of course, there's the energy side of things as well. George, how bad do you think this could get?

George Friedman: Well, it's spring in the northern hemisphere, it's time to plant, it's time for fertilizer. And what I didn't realize at the beginning of war is it's not going to be oil per se, that's a critical thing, but natural gas, because that's a major component of fertilizer. And so the center of gravity here is if in northern hemisphere we don't have enough serve fertilizer to plant food, that's going to be a major problem. Now the question then is can the Straits of Hormuz be opened by military force? That would be done. But the problem here is yes, in ways five years ago, 10 years ago, they could have opened it with Marines landing on both coasts of the driving the Iranians 30, 40, 50 miles away and opening it. The problem is that 30, 40, 50 miles away is not enough. Given that there are drones and given that the location of Gulf doesn't move where the straits sympathetic stays and given that simple intelligence by people looking with binoculars from far away, sending back look times time to hit. There's a ship in there, I mean it's very hard to open it the way it used to. Warfare has changed fundamentally. So whereas simply taking the straits surrounding it by troops for 20, 30 miles out, that doesn't necessarily open the Straits of Hormuz. And no one's going to ensure a ship coming through a strait where they're going to be for several hours passing through a very narrow place where drones can come in and destroy the ship. So that's really the issue that the conventional solution or the prior solution before the introduction of the drones would have been to take it down, have anti aircraft weapons on site, protecting aircraft, and we may wind up taking it and rapidly deploying anti missile anti drone systems there. But still, do you take a incredibly valuable ship with necessary products and push it through there, seeing it sink, and now block the straits again, so it becomes a much more complex issue.

Christian Smith: You wrote an article this week about the future of war, reflecting on your book from 1997 with the same title. I mean, in that book you talked about unmanned UAVs effectively and how that was going to be the situation. I mean, are we in that moment now? Is this where we are? And as a result, are both sides or all sides sort of feeling their way?

George Friedman: Well, when I wrote that book, unmanned aerial vehicles in my mind were aircraft that would drop bombs, but wouldn't have pilots on board. All right, What I didn't anticipate is that the unmanned aerial vehicle would itself be a bomb. In other words, they're not dropping bombs. You fire at them. They are actually the bomb itself. That makes it a very different and much more efficient form of attack. So these drones that have emerged have made the normal things abnormal in the sense that what used to be street depth, 10, 15, 200 miles no longer protects you from the enemy. With these drones, you have to destroy the drones themselves. And the way the Iranians have done this in the mosaic strategy they did is they expected to lose both the high command and communications, so that each one of these mosaics, this small area, smaller areas, are able to operate under the command of the local commander and try to build systems to collaborate on using drones. So the most important thing at this point, we destroyed the political system, if you will, of Iran. That didn't weaken Iran. The IRGC took over. Now, if we knock out the high command of the irgc, these mosaics will continue to operate. This is a case in which it seems the only way to end the war is to actually destroy the weapons. And destroying the weapons is difficult because there are so many distributed and so many attacks would have to be made. So the fundamental question in terms of Iran's ability to survive is just how many drones they have. When will they use them up? Are they producing enough to replace them? Because if there is a way to get them to use up their drones relatively ineffectively, to the point that it's not an issue, then we're back to the old model of war. If, on the other hand, and I would like to think that American intelligence knows to a great extent how many they have, and so on and so forth, I don't. So I don't know just how long they can stand. But this war depends either on negotiation or an uncertain future, because we do not. I do not know how many drones they have, how much intelligence they have from satellites, which they have some. And the Russians are apparently giving them intelligence on satellites, as we did to the Ukrainians. So it simply is question is, when do they run out of these weapons? And that's something we don't know. Can we destroy all the weapons? Well, even if we destroy most of them, we're in good shape, much better shape. But these are the kind of issues that were not faced in prior wars. Weapons of great accuracy at great distance. So let's say that you take one half the country, and the other half of the country is still armed with drones. The fundamental question is, how many do they have? Where are they producing them? How many are they producing? And that really is the pivot.

Christian Smith: It's interesting. Obviously, so many of those weapons are underground as well, which makes things harder. There's an interesting comparison, of course, with Ukraine, which I think you mentioned in your piece as well, George, which is that this sort of way of fighting has also been going on in Ukraine. And these two wars have sort of confirmed each

other in that respect. I mean, there's also the interesting side of it as well, which is the comparison with the war in Ukraine and the First World War and the trench warfare that's been going on there and Russia's sort of meat grinder mass assaults that have been going on. I mean, sorry, you go on, George.

George Friedman: It's precisely those mass assaults that are impossible to mass. One of the mistakes the Russians made is they didn't realize how much intelligence the Ukrainians were getting from the Americans and the Europeans on precisely where the Russians were massing troops. Nor did the Russians realize that the drones that they had would destroy infantry forces. One of the reasons that the Ukrainians survived and the Russians did so badly was the introduction of the drones made mass movement by infantry very, very costly. So everybody was deployed, nobody could break through. Now, this is the second war based on this. And the Americans explain in a way, experiencing the same thing the Russians did, you know, threatening to send 10,000 or 100,000 troops in. Okay, while the drones remain in place and all these men are massed together, given the number of drones is a very dangerous thing. So warfare has changed fundamentally, mostly because of the distances evolved are so much greater. It's no longer hand to hand combat. It is no longer an artillery range and so on. It is now, thousand miles, 2,000 miles. And therefore, what does it mean to be able to invade and occupy a country when from a thousand miles away massive bombs can be targeted? You. So yes, Ukraine was the first war in which this was encountered by the Russians. And I think one of the things the United States is doing is learning from that. And so I doubt very much that unless we can destroy the drone capability, the missile capability, we're not going in on land, because if they have the intelligence of where we're going, they know how to target. It's precision strikes.

Christian Smith: And I guess because you do see in Iran, sorry, in Ukraine, you know, artillery and hand to hand fighting, but artillery in particular being used. But that's all somewhat dependent on it not being caught out by drones or by other long range missile strikes.

George Friedman: Well, the fighting is taking place in very small places. So it's being in Donbas, around villages and so on there it's hard to very discriminate who is where and what. This is kind of combat, but it's tactical combat. It's not strategic. Winning this village is not going to win the war for the Russians, nor win the war for the Ukrainians. So on that level, a very small unit combat, the rifleman, is still critical, and that's the kind of fighting you're seeing. But the kind of massed attack the Russians used to mount are no longer happening. And those kind of massed attacks, what you used to see in World War II, for example, are just

impossible to have. And therefore ending a war for the Russians and for the Americans as well, who are not involved in the ground, don't want to be involved on the ground because of this, is harder to do.

Christian Smith: Do you think that this fundamentally changes the way that not just wars will be fought, but whether or not one country can invade another in the way that we have in the past, or is that just the case right now? Until we come up, until someone comes up with another way of stopping these drones, whether that's by taking out satellites or, you know, things like Starlink and Internet systems.

George Friedman: That's exactly right. I mean, the wars will still be fought, invasions possible. First you have to take out the intelligence so they know where to strike, so that war takes place in space. Then there's the question of your ability to stand off and send weapons, to destroy their weapons. A drone to drone combat. Okay. But in the end, occupying a country means the troops have to come in, but they won't come in until, to a great extent, the threat of these weapons are reduced. So wars are going to be fought differently. But if we were, for example, to be able to destroy their ability to communicate, to receive intelligence and knock out a whole bunch of the sites that have drones, it's possible that we could go in and do fairly well. But doing that is very difficult. Knowing that you succeeded is even harder because you might wind up thinking you've done it. Put three or four divisions on the ground, and they get pounded by forces you missed. So one of the questions here, how do you know when they're out of drones? If they just stopped sucking you in, it becomes a very different sort of war that we have not experienced yet. You look at Ukraine, you can understand why the Russians failed to take Ukraine. You look at this war, you understand why the Americans are very hesitant about putting boots on the ground,

Christian Smith: bringing it back to the negotiations in the Strait of Hormuz. Given all that's just been said, I think the pressure that could be on the US in this respect is somewhat obvious, not just in terms of internal domestic pressure, but pressure might be applied by countries, particularly those like Australia, Japan, South Korea that are going to suffer, particularly in the Asia Pacific region and then also in other parts of the world as well. But from the perspective of Iran, is there any pressure on them externally to close the strait, to reopen the Strait of Hormuz outside of those countries it considers its enemies, quote, unquote?

George Friedman: Well, what is pressure? There's desire and there's pressure. There's great desire that they do it. But given their circumstances, how powerful is the other nation's desire to do this? From the American point of view, since the United States really went to war with the

basic issue being their nuclear program, how much pressure can you put on the United States or Israel to leave those weapons, those nuclear weapons in the hands of the Iranians, particularly after the war? So I don't want to make it simply a question of the nuclear weapons, but they are a very important aspect of the war. So yeah, I mean, we would all be sorry if Australia was unhappy and God knows we wouldn't like to offend the French. But at the same time, there seems to be a fundamental issue here, but both sides need to end the war because one, the United States does not want to fight another land war and there'd be great opposition to it in the United States. And second, because the Iranians could be savagely destroyed in this war. And this is why I regard think that negotiations which are taking place in Pakistan ways is going to somehow end this war. They will somehow give up their nuclear capabilities. We will halt the pressure on them and we go on. In some ways you will notice that the Chinese who had had their, their own shipments of oil from the Straits of Hormuz blocked now are receiving shipments of oil. So one of the things that the Iranians are trying to do is not put pressure on these other countries to put pressure on the United States. But so it's a very complex situation, one that is made complex by the new type of warfare. But also the reason the United States went to war is very subtle and complex. You know, nuclear weapons. And the Iranians have no choice. It's the American choice, whether it's war or not. And how long can they hold out

Christian Smith: and do you think, as you say, shipments are starting to come through for places like China. But, but China, Pakistan, ironically enough, India as well, are heavily dependent on energy coming through from, from their Taiwan. Interestingly, although they sort of sit on the Other side, but they need a lot of that sort of things like helium for their. For their. For their semiconductors. But the other countries, I mean, how likely are they to be pressuring Iran to say, you know, you need to reopen this. Do you think Iran can give them enough through the straits on their own?

George Friedman: Pressure is an abstraction. What sort of pressures can they put on Iran to give up fundamental interests that they think they have in the same way with the United States? What pressure can they put on the United States to do this? So the idea that great pressure is going to be a likely weapon in this or the displeasure with the United States or Iran is going to change their direction is really simplistic. We are now in the war. The United States is prepared, I think, to end this war based on nuclear weapons. The Iranians are ideologically prepared to fight this war for a while. But at the end, when you take a look at this, beyond nuclear weapons, the United States has no fundamental interest in Iran, okay? Beyond stopping the fighting and having more influence in the region, Iran has no reason to. So these two countries are fighting. And I think settlement is possible because I think both sides can

have what they want. The Iranians can forego their nuclear ambitions if they had them. By getting rid of the weapons, having inspections, the United States can avoid the terrible misgivings of the other nations that it's lied with about the war, and it will. So I think when we look at this war, I don't see it being ended with an American victory, save for years of combat, nor with an Iranian victory, except for the Americans getting tired of the war, as in Vietnam. Okay? But right now, we really have to face the fact that negotiations are taking place. The Pakistanis are harboring it. The Chinese have asked to enter the negotiations, and they asked the negotiations not to bring pressure on the United States. Remember, there's going to be a summit meeting already scheduled between China and the United States over economic matters which are very important to Chinese. This is the Chinese wanting to have access to their oil. They really need it. So I think the Chinese will add at this meeting to pressure on the Iranians or more precisely, by refusing to give aid to them, which they haven't. That would be a powerful force.

Christian Smith: I guess the question then is, do you think Iran is willing to give up its nuclear capabilities?

George Friedman: Well, it depends how long it can fight the war. It depends on how many drones it has. It depends if we know where the factories are that produce the drones and can we destroy them, can we do these things? Well, that will determine how long they can continue the war. And sometimes wars end when you realize that, look, this goes on long enough, I'm going to lose anyway. Let me negotiate at this point. I think it's very interesting to see that countries like Saudi Arabia and Egypt and so on have now involved themselves in this negotiation, which these countries are not particularly close to Iran. Saudi Arabia is quite hostile to them. The Turks are involved in this now. So other nations in the region are coming into the equation. So what I see really happening is negotiated settlement because the US can't afford this war in this period. It's not valuable enough. The Iranians can't withstand this war for an extended period. Neither side wants that war to go on. And so there'll be a negotiation that will somehow end with the Iranians giving up their nuclear capability, the United States moving back and opening the states and go back to it. The nice thing about this negotiation is if the Iranians are prepared to give up the nuclear weapons possibilities, the Americas have not yet put ground forces in. They have not suffered thousands of casualties that they don't want to just leave there and so on and so forth. You know, after that, the blood of the Americans has not been shed sufficiently and the Iranians have too much to lose. So I think in negotiations is possible and almost certain.

Christian Smith: And look, final question, George. What we haven't talked about in this is Israel and what it wants. So I suppose my question there is twofold. There have been plenty of suggestions that Israel wants something different out of this war to what the Americans want, that they want more of a fundamental regime change. So will they get that? Or perhaps would they put up with not getting that? And on top of that, does that really matter? Or are they really just subject to whatever the US Decides it wants?

George Friedman: The Israelis are even more terrified by an Islamic nuclear weapon than the United States is. Yes, the Israelis have fundamental problems. Israel is a very weak country geographically. Its widest part is 85 miles long, deep. They have no strategic depth, and they're surrounded by hostile forces. Whatever happens in Iran to this regime, it is still an Islamic country, a Persian country, not an Arab country. And at the same time, it has a fundamental cultural, religious, ideological differentiation with Israel. From my point of view, Israel's reality is unchanging. The danger is there. Its only option is to evolve in such a way as they can make an accommodation with the reality they live in. The Israelis and the Americans had one interest in common. They said that Israel persuaded them to. It was the nuclear weapon. The nuclear weapon Going off the scale. Now, the Israelis and the Americans have different interests, and the Israelis cannot continue to conduct any war if the United States doesn't want them to, because they're heavily dependent on the United States. So in other words, Iran has the option of ending this war without shattering itself, which it would over time. And the question is, are they politically able to do that? And that's something I don't know the answer to. Or is this regime so ideologically committed, the idea of becoming a nuclear power, stopping the Americans, stopping the Israelis, that they can't. But every indication is from the Pakistanis who are doing these impersonal, not person to person negotiations, but through them is the Pakistanis are indicating that a settlement is very, very possible. And I think the Chinese are entering this, not on the Iranian side, but on the American side. They want the Iranians to open the straits, stop this, and so on. So it really becomes a political question and a hard one to answer. But at the same time, it seems to me that the realities of this war are such that it cannot go on for a very long time. We cannot withstand this war for years. Okay? This cannot be Iraq or Vietnam or something like that. The Iranians can't withstand this war for years. So under these circumstances, I see a settlement where the United States gets what it wants, the regime gets survival, and Israelis don't get everything they want.

Christian Smith: George, let's leave it there. Thank you very much, as always, for your time on the podcast. Thank you out there for listening as well. We'll be back again soon with a new podcast from Geopolitical Futures. Until then, you take care and goodbye.

George Friedman: Goodbye.

Christian Smith: You can find all of our expert geopolitical analysis@geopoliticalfutures.com.