

Transcript — Iran's Nuclear Gamble and Trump's Midterm Countdown

Christian Smith: We're five months on from the start of the US Israeli war with Iran. I don't know about you, but it feels like it's been going on much longer than that with the seemingly never ending scenario of tit for tat strikes. Ceasefire then. Not ceasefire. If you blockade me, I'll blockade you. On this podcast, we try to look at what Iran's strategy is now and how successful that might be. Hello and welcome to this podcast from Geopolitical Futures. My name is Christian Smith and I'm joined on the pod by GPF's chairman and founder, George Friedman. And we're looking ahead to the US midterms and how the war with Iran might impact then. George, hello. Welcome.

George Friedman: Good to be here.

Christian Smith: To start off with, let's take a step back and look at this war in perhaps the pantheon of American wars. We've just had the 250th anniversary of American independence stretching from all the way back then to now. How does this war pan out in terms of existentialism for the US?

George Friedman: Well, first of all, we have to remember that we've had tragically 14 casualties, 14 deaths. This is not a very intense war by the United States. Vietnam, we had massive losses, 50,000 died. So put this war in those contexts. We're not really at war yet, even though we're trading punches. So we haven't moved that heavily into it. But when we take a look at what this war means in the United States, it's of some importance. But there are existential wars which would threaten the future of the United States and elective wars which we choose to do. So World War II was essentially an existential war. If we had lost it, beaten by Japan or by Germany, the future of the United States would be very much in question. The wars in Vietnam, Iraq, Afghanistan, they were choices that were made, okay? They were selections. This war in Iran should be looked at that way. This is not a threat to the United States except with one dimension, which is the fundamental reason that President Trump is saying we're going to war, which is their nuclear capability. As I've said before on this podcast, one of the reasons of the war was the fear that if the Iranians developed a nuclear weapon, the possibility of a nuclear 9 11, the ability to send at a false flagship a

nuclear weapon into New York harbor was possible. Al Qaeda's remnants, it's a shattered regime, but the remnants are given. They were the ones who did 9 11. They're given sanctuary in Iran. So we look at the Iranian relationships with these people when we look at their ideology, the fear is not completely irrational. So in that sense, if they gained a nuclear weapon, they would pose an existential threat, possibly to the United States. Thus, if you hear everything that Trump is saying, is constantly talking about the nuclear capability. So at this point, it's not an existential war. In other words, we are not going to collapse because of this war. The economies may be troubled and so on, but we will not collapse. On the other hand, if we simply leave them to develop nuclear weapons, I think is the President's view of it, at some point, it may become existential. So this is an attempt to, to head that off.

Christian Smith: It's, it's an interesting question. Obviously, you can, we can have a debate about what existential means, whether it's, it's, as you say, World War II. America, as it's, as it was known, probably wouldn't have been able to exist, continue to exist, if it had lost that. Now, I suppose you could ask the question, you could say it's not existential, but a nuclear attack in some variety on the US By Iran, however likely or unlikely, wouldn't cause America to collapse. But you could argue that that's such a red line, it's almost existential. I mean. Sorry, you go, George.

George Friedman: Well, no, when you talk about existential, you mean survival, but you also mean catastrophic events. Okay, so let's say that the United States survived in a world where Japan and Germany were the fundamental powers and we had lost the war. That would be existential in the sense that the way we existed would be dramatically shifted, might be death, but it'd be catastrophic in the same way that a single strike at New York, for example, with nuclear weapon would not destroy the country, but would have massive impacts on how we live and everything else. So when you take a look at the question existential, it's not merely the life or death of the country, but the profound impact it would have. And I believe that Trump's reasons for constantly returning to the nuclear issue, and having stated that, was his primary interest along with Israel's, is the reason that he went in there. And we should also bear in mind, as I said before, the United States has tragically had casualties, but nowhere near the casualties that would happen in a real war. So we have to put this in context and understand

what it isn't. What is. It is a serious war for the United States, but that war is really not being waged in that agreement back the way in which wars usually happen, with many deaths and so on on our side.

Christian Smith: We're going to come onto Iran strategy in a moment, but let's just stick with this for a second because it's an interesting one I've been thinking about, because you could argue it is existential. Now, for the US if you're looking at this question of nuclear, and I suppose, of course, everyone likes to get into the weeds of, well, is the US Doing the right thing? Is Donald Trump doing the right thing? A lot of this comes back to whether or not you like Trump, of course. But dealing with where we are now and putting to one side whether or not you think it was a good thing to start this in the first place, whether you liked the jcpoa, whether or not you think there were other ways of going about this. But where we are now in terms of Iran not looking particularly keen to give up any nuclear program and the US Being in a position where its options at least apparently are quite limited, is this not a situation where the US Going from here has to actually do a lot more to stop Iran getting a nuclear weapon?

George Friedman: If I am correct in this, okay, and that's an if I think I'm correct. But if it's the case, it's sufficiently serious that we can't walk apart at the same time, the question is, if they don't agree to giving up nuclear capabilities, what can we do? Well, remember this. Long before this war was launched, the United States attacked nuclear facilities in Iran. They failed to take them out, apparently. And this is what is made public. And I have no idea if this is true or false or whatever, we believe that the United States believes that the nuclear capabilities have been based on fundamentally underground, so deep that conventional weapons can't reach it, possibly so deep that a nuclear weapon couldn't keep it. I don't know if that's true, but I think that's what they, that's why they're not attacking the nuclear capability. They can't reach them. Therefore, if this is true, and assuming it's all rational, we're trying to put as much pain on Iran to capitulate on this issue. The Iranians in response are trying to put as much pain as they can on the United States as well as their allies in the rest of the world in order to force us to stop. So Iran has a great deal at stake. It really has the regime itself. Remember, there was an uprising which is reported 20 to 40,000 people were killed during when they put it out, it was just a few a month before the attacks occurred. So there seems to be have been deep opposition to

the current regime, which is the irgc. The military force inside of Iran, which is both an economic power, controls businesses as well as a military power. So on the one side there's a hope that the Iranian. There was a hope that the Iranians would rise up. They didn't. Not after the massacres that happened before. On the Iranian side, there is a hope that either the United States or at least Donald Trump would be put in a position where we would have to capitulate. So both sides are in the process of testing each other as to who is more likely to survive the pains that the others are posing. And we have not really launched an intense war. We're fighting on the peripheries. They are blocking the Straits of Hormuz to raise the price of oil and give that pressure on the United States. We are not attacking them with anything near the force. We could for two reasons. One, because we'd rather not do that. We'd rather have a settlement for that. Secondly, we're not certain that no matter how much force is imposed, the IRGC would capitulate. So everybody is sitting here testing each other. A full scale war is not underway in any way, but each side is threatening something of the other side. And that's the stage we're at. Where it'll go. That's a different question.

Christian Smith: Want actionable insight from geopolitical futures? Introducing geoeconomic lens helping you understand not just what is happening, but how global power dynamics shape economic stability, dependency and opportunity. Explore the first issue for free@geopoliticalfutures.com lens. George, we heard this week that America had decided not to escalate the war for the moment because of potentially lack of Patriot missiles and munition stocks and things like that. Do you buy that? I mean, as we've talked about before, you don't exactly tell people in a war what you're going to do or why you're going to do it. So do you think that's just an excuse or do you think that's actually true?

George Friedman: Well, this is where in geopolitics usually politics don't enter it. But this is really a political issue. The majority of people in the United States, large majority are opposed to this war. Not only Democrats, but also Republicans, because one of the reasons that Trump was elected was that he promised not to get in these endless wars that we were having from Vietnam through to Afghanistan, okay, stopping in Iraq, and that these wars that landed nowhere and they achieved nothing, cost many lives. So one of the reasons he was elected is promising not to do this. Now, whether he was forced into it by the nuclear threat or he chose to do it, I don't know what his reasoning was, but he engaged in that.

And that has created a terrific political problem for him in the United States because not only the Democrats who dislike him personally in every way you can look at, but a significant group of Republicans, particularly on the right wing, that opposed these wars, previous wars, are hostile to that war. Will they vote against him? He's not sure of that. And therefore he has the midterm elections coming, and they're coming in October or November, I think it is. And in that election, he may lose control of both houses of Congress in a very real way. If that happens, his presidency is over in the sense that the things that he wants to do or needs to do or president could do, he can't do because of the power of Congress, which the Supreme Court will back up. So in a way, his presidency is at stake. So he's involved in a war that he thought would be over very quickly, which in turn became, as all the other did, an extended war. And he's facing the midterms elections in a few months. And so this is a war that he is personally vulnerable on. And in that sense, he needs either to end the war, at least not extend the war in the sense of much more casualties and so on and so forth. And so in a way, the vulnerability that he has in terms of regime change, if we call the United States government regime, okay, they have a hold over us. Because if this war continues, the Iranians estimate Trump may be paralyzed in his presidency. And so that becomes a very critical issue. And I think the Iranians are pretty sophisticated about American politics. They're not stupid.

Christian Smith: Okay, well, look, we're meant to be talking about Iran's strategy. And I have somewhat sidetracked us with other questions about America's strategy. So let's look at Iran's strategy here. Of course, we sort of know what they're doing, though. They're trying to keep the Strait of Hormuz closed. They in many ways have done a very good job of making the most of their advantages. What's their long term strategy here? What is it actually aiming for?

George Friedman: Well, they ideally would like the United States to go away and stop bothering them. Well, yes, but their strategy here is this. They think that Trump, if this war goes on, will lose the elections in House and Senate, creating different government in the United States in many ways. They know that he doesn't want to do that. He knows they know that he wants them to reach a settlement with them, and they know that the closer they get to the election, the more likely he is to make concessions. Up to a point, the elections are in November. If in October, he suddenly reaches an agreement giving great

concessions, he can't do that because then he'll lose the elections on all sides. So I think they're trying to push him into a position not where he's going to be defeated militarily, because that's not likely to happen, but simply that the war goes on and he has to reach some sort of accommodation to end the war if he's not going to lose Congress. And so the pressure they're putting on him is constantly indicating that they're going to reach an agreement and constantly violating the agreement. They want some major concessions from him, and they think the longer they do that, the more desperate he's going to get. Save that. I think they understand that he will under no circumstances in October or even possibly September, be able to reach a settlement at the peak of that. So what they try to do is put this pressure on him, seemingly indifferent to the actions he takes and the damage he does to the country, thinking that at some point, Trump will reach an agreement. And in the same way, the United States, in a way, expected the Iranians to reach an agreement, and we're hoping they'd reach an agreement. This is a game in which both sides basically know one that Iran can't win the war, certainly the United States cannot afford the price of winning this war. And that which one is going to blink first is going to be the fundamental issue. So I think much of these things that are going on with diplomacy on the one side, throwing aside whatever promises were made by Iran is a form of negotiation. In negotiation, you're kind of gambling on who has the most guts, who needs this deal more. And I think the Iranians are moving so slowly and so irresponsibly, it seems to give him the idea, Trump, the idea that they really don't care they're in this war and will carry it out forever. Something he can't bear.

Christian Smith: Well, that's the other thing. What if nothing is on the table that is acceptable? What if the Iranians put nothing on the table that is acceptable to Trump and he can't do a deal before the midterms?

George Friedman: Well, then he has a choice. Be a crippled president, as other presidents have become, or make the concessions. And the Iranians, I think, are betting that he will make the concessions he has to make in order to end the war, because, remember, the party that opposes this war, the factions within the Republican Democratic Party that oppose this war think we don't have a very high stake in it, that this is one of the other wars that we just got into without any risk. Therefore, they might actually welcome him just pulling out of the war. So it's hard to predict whether he comes out looking foolish or looking cautious and

thoughtful. Whatever it is, this is where the Iranians are trying to put him, and it's a tough spot for him.

Christian Smith: If Trump loses Congress, can he continue the war after the midterms, do you think?

George Friedman: Well, the question on that is that Congress allocates the money. Congress also has the ability to pass laws. President can veto them, but with enough people opposing these things, they could override. So the reality is that at this point, he controls with small majorities, both houses, he has the ability to act on his own. Come the midterm election, the next two years of his presidency, he's going to lose a lot of room for maneuver and be limited in what he can do. And I think the Iranians are constantly agreeing to things. He declares that we're going to be over in a few days. They then pulled a rug out from him, under him, and it's so far put him in a position where he has a choice of really launching a major attack, which I don't think he's going to do. I don't think a military invasion of Iran would be very costly even if seceded. And remember, our records in wars since World War II are not shining. We didn't lose the Vietnam War. We negotiated an end to the war that in fact gave North Vietnam everything it wanted, South Vietnam. We didn't lose the war in Iraq. We just simply failed to define what the war was about and why we were fighting it and went home. The same story in Afghanistan. In none of these wars did the United States come out victorious, because, for one thing, we didn't have any. The stakes were not high enough in these wars to launch the kind of wars that would cost billions, trillions of dollars and thousands of lives. But Vietnam did so when we look at the situation, so did so did Iraq. This is what he wanted to avoid, and this is what the Iranians are trying to force him into believing that he will not do it. And so that's the story for the while.

Christian Smith: Take a moment to follow and rate us on your preferred podcast platform. If you're already watching on YouTube, don't forget to like and subscribe. I suppose the question for Iran in particular, as well as the rest of us as well, then is where is the perfect intersection between what Trump can accept and what they want? And does that actually exist? Because it's all good and well for them to want to try and get him into an agreement before, in good time, before the midterms. But what could that actually be that he could accept and not shoot himself in the foot anyway?

George Friedman: Well, he's going to shoot himself in the foot some way or another. Okay. Unless he suddenly launches an attack so devastating that the RRGC capitulates or collapses. Outside of a nuclear attack, which I don't think we're going to do, I don't see any way that that can be done. The IRGC is a well trained, well armed, and above all loyal force willing by its ideology to fight to the death. There's also another army in Iran, the Artesh, which is the secular army going back to the Shah. And that army now is getting involved as well in defending Iran because it's the army that's supposed to defend the country. So there are major forces inside Iran. Some people say we really ought to hit them with everything we have. Well, short nuclear weapons. It's got to be very hard to hit them with everything you have and very costly. So Trump is actually caught between the cost of the war in the long run and the consequences to his presidency. Okay. As opposed to simply giving up and going away. He's desperately trying to negotiate something with the Iranians that he could save, and the Iranians are constantly promising it and then pulling the rug out from under him. And so one of the things that we don't have here, aside from a fundamental interest on Iran, is a way to really wrench them apart, because the one thing they have is national solidarity in this matter. Although their opponents, they're terrified of taking on this regime. Their forces are well deployed so that they would cause on the ground tremendous casualties if we went in. And it is not certain, as in the other wars, that we would be able to continue it. So a lot of people are saying, why don't we hit them with everything we got? Well, short of nuclear weapons, most of what we got is not going to be enough for them because they're playing for everything.

Christian Smith: Well, I mean, from Iran's perspective, I suppose there's two aspects to this. We see increasing pressure in the US from, from particularly more right wing quarters for the US to, to arm the Iranian people in some variety question obviously how that would happen, but there are suggestions that that could be done. And at the same time, there's suggestions, as you sort of say there, George, America could go, and what it hasn't done yet is hit critical infrastructure, power plants, bridges, desalination plants. And obviously those two things could work in tandem. I mean, for Iran, for the irgc. Could they survive there? Obviously, they've probably factored that in somehow. But could they survive that?

George Friedman: Could they survive capitulation is a better question. Or reaching an accommodation that is far short of what I remind you that? And it's critical, when there was in the streets demonstrations in Tehran, this force shot down all these people. Do not underestimate the ruthlessness of the Iranians to their own people. So at a normal war, what you try to do is convince the public that the war is lost or convince the public the war is not worth the price and get opposition. Iran, in its actions that it did up to this point, demonstrated that that is not going to be helpful for you and your health and your longevity. So the hope that you hit them hard enough economically so they are forced to capitulate, I don't think understands the fanaticism of the irgc. They are prepared for this. They will do anything they need to. So, unlike other countries in which we fought where we thought we could separate the population from the government and never did successfully, this is a very hard thing to do in Iran. This regime, even if it's hated by everyone, is very powerful, very committed, very ideological, and utterly ruthless. So trying to push that knife into the economy, if they're going to kill 10, 20, 30,000 people before the war, what will they do after it? So I'm not. I don't believe that attacking infrastructure and limiting their economy is likely to compel them to give up. And in any case, they're betting that Trump has more to lose by continuing the war than they have.

Christian Smith: And inevitably, some kind of blockade or anything like that would take years to have a proper effect.

George Friedman: Well, it would take years to have climate effect. Putting a blockade on in this day and age of drones and missiles, of which Iranians seem to be able to produce quite a few, is very dangerous. So we're not in the day. We can throw a barricade across the ports without being certain that we might lose some ships as well. So every action that can be taken is a question of cost. The Iranians are betting that they're willing to pay a much higher cost to survive than Trump is to defeat them.

Christian Smith: If you were in the White House now advising the president, what would you say then?

George Friedman: Well, I would say very politely, Mr. President, you're brilliant. Everything you've done is wonderful. I've got to go now, sir. I mean, how do you tell the president, you're in a really tough spot, guy. And the one thing you can't

do is capitulate to the Iranians. The other thing you can't do is leave without a victory. So I don't know at this point exactly how to do it. I would say that his best strategy, okay, is to reach an agreement that benefits the Iranians, try to get for that agreement something like the nuclear capability. But then again, once you get the nuclear capability, who's to say they don't rebuild it in two weeks or three years or something like that? So what the United States really wants is not to have a nuclear Iran. And the Iranians could concede that and give it to him, but I think they feel that they have a much better hand. If, on the other hand, Trump didn't care if his presidency was frozen, but he felt that this war had to end, and he did that, well, it may be that his presidency wouldn't be frozen, that it would see in a different light. I don't know. I'm not a politician, so I avoid the political analysis, but I think this is what the Iranians are counting on, that he's going to be coming closer to the election and wanting to end this war.

Christian Smith: George, let's leave it there. As always, I'm. Well, I'm glad we're both not in the White House anyway, as always, thanks very much.

George Friedman: Thank you.

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