



Episode 2: Trump Must Admit Defeat In Iran

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John Mearsheimer: The Iranians are more aware than ever that they're in the driver's seat. They're more aware than ever that President Trump is in deep trouble and that he needs an agreement.

Intro: The West is leading Ukraine down the Primrose path. The Israelis are executing a genocide in Gaza. It's not China's fault that it wants to be powerful. So if you get into trouble and you dial 911 there's nobody at the other end.

Hi, this is John Mearsheimer, and I'm back again with another episode. And this time, I wanna talk about the Iran war and what I'd like to argue here is that it's time for President Trump to settle this war, to reach an agreement with the Iranians to put an end to it, and in effect, to accept defeat, to recognise that Iran has won this war and that we have lost the war. And the way I'd like to proceed is I'd first like to talk about the goals that the United States set out to achieve at the start of this war. And then I'd like to talk about our failure to achieve any of those goals. And I like to describe how badly off we are in terms of having pursued these particular goals. And then I want to switch and talk about the military strategies that we have employed in pursuit of those goals. And of course, the argument that I'm going to make is that the different strategies that we have employed have failed to achieve the goals that we set out with this war. And I want to talk at some length about those different strategies and why they failed. And I'm going to make the argument, as will become clear, that there were five potential strategies that the United States could pursue. It only pursued three of them, two it did not pursue. And I'll talk about those three strategies and why they failed, and then I'll talk about the two strategies we didn't pursue. And why we did not pursue them. And you want to keep in mind here that what I'm going to be constantly doing is talking about the

relationship between the goals that we're pursuing and the strategies that we adopted or didn't adopt to achieve those goals. But let's start with the goals.

When the war started, the United States, and this was true of the Israelis as well, had four goals. The first goal was regime change in Tehran. The second goal was to make sure to eliminate Iran's ability to enrich uranium. Because if you can enrich uranium, you can rather easily make a nuclear weapon. The third goal was to eliminate Ukraine's long-range ballistic missile programme. And the fourth goal was to basically get Iran to no longer support Hamas, Hezbollah, and the Houthis. Those were the four goals. And very importantly, I think regime change was the most important of those four goals, because if you didn't achieve regime change, you really could not achieve the other three goals. So regime change was the numero uno goal, but you still had these three other very important goals that were, in my opinion, subordinated to that overarching goal. Now, the question you wanna ask yourself is where are we today in terms of those goals? And let me make two different sets of arguments here. First of all, just looking at the four goals. We have achieved none of the four goals; none of them have been achieved. And there's no evidence any of them are going to be achieved any time soon. In addition to that, we are now in a situation, which we were not in back on February 27th, the day before the war started, where Iran controls the Strait of Hormuz. And today, as we speak, has shut off the flow of traffic in and out of the Strait of Hormuz. Furthermore, on February 27th, the day before the war, the United States had a robust alliance structure with the Gulf States in the region, and it had a serious set of military bases in the area. Today, those bases have been either badly damaged or destroyed, and the alliance structure that the United States had with the Gulf States has been basically torn to tatters.

To take this a step further, the international economy, because of the blockade on the Strait of Hormuz, is in a very dangerous situation, and there is a real risk of a worldwide depression if this war is not settled sometime soon. And then finally I would note that China, which is America's principal adversary, according to the Trump administration has benefited enormously from this conflict. So this is a situation where the United States has not only not achieved any of the four goals it set out with, it also has a number of other serious problems today that did not exist on February 27th, the day before the war started. Let me come at this from a different perspective. If you look at the Memorandum of Understanding that President Trump signed with the Iranians on June 17th of this year, this Memorandum of Understanding was designed to shut the war down. What you see is that that was basically a surrender document. President Trump basically conceded every point that was an issue between the Iranians and the Americans. The way the document was set up, this is the Memorandum of Understanding, is that we would have a ceasefire up front. The fighting would stop and the Strait of Hormuz would be opened up. And furthermore, the Iranians would be able to sell oil on the open markets, which had not been the case before the June 17th Memorandum of Understanding was signed. They could sell oil without having to worry about American sanctions. That was the first part of the agreement. Again, to get a ceasefire, number one, and number two, to open up the Strait. Then there would be a 60-day negotiating period, and at the end of that 60-day negotiating period there would be a decision on the nuclear issue, but it was very clear that the Iranians would maintain a nuclear enrichment

capability, which was at odds with one of the goals we had going into the war. Furthermore, it was clear that United States would have to allow all those frozen Iranian assets to go back to Iran, and furthermore reparations would have to be paid to the Iranians for all of the damage that was done to Iran in this war, and an enormous amount of damage was done, so an enormous amount of money would have to be paid to the Iranians.

And on top of all of this, the Iranian's would be able to sell oil freely on world oil markets. So all of this is to say that if you look at the Memorandum of Understanding, the United States conceded on every key issue. The Iranians prevailed. So in terms of the goals that we went into this war with, we failed to achieve any of them. And we ended up much worse off after the war got going. Now, the question you have to ask yourself is, what happened here? We had a set of different military strategies that we tried to use to achieve those four goals that we set out with. And the question that you wanna ask yourself is, what were those strategies and why did they fail? Now, what I'd like to do is, I'd like to frame the discussion in terms of what I think are the five possible strategies that the United States was presented with and then describe what happened and then analyse why the strategies didn't fail. So I'm gonna lay out the five strategies that I'm going to describe what happened from February 28th up to the present in terms of employing those strategies and then I'm going to analyse why they failed. Here are the five strategies. The first three involve air power, the fourth involves naval power, and the fifth involves land power or armies.

Regarding air power, the first strategy is what I would call a discriminant air campaign – a discriminant campaign. And when I say discriminant, a discriminant air campaign is basically a strategic bombing campaign where you do not go after certain targets. In other words, you discriminate. And in this case, a discriminate air campaign involves going after military targets, a handful of civilian targets, and civilian infrastructure, but basically staying away from massive attacks on civilian infrastructure and staying away from the oil facilities in Iran. Now, when I say civilian infrastructure this means staying away from bridges, staying away from attacking bridges, staying away from attacking power stations, and of course, staying away from attacking the oil facilities, the oil and gas facilities inside of Iran. This is what a discriminant air campaign, a discriminate strategic bombing campaign looks like. I contrast that with an indiscriminate air campaign. An indiscriminate air campaign is where the United States and the Israelis go after all of the targets that I just described as being legitimate in a discriminated air campaign, but also going after civilian infrastructure, power stations, bridges, and going after oil facilities. In other words, targeting all of the possible targets inside of Iran. That's an indiscriminate air campaign as opposed to a discriminant air campaign.

The third strategy is tit for tat. And this is an air campaign as well, but it involves small scale attacks where one side hits the other and then the other hits back. And that's what I call tit for tat. It's on a much smaller scale than either the discriminant or indiscriminate strategic bombing campaigns, much more limited. So those are the three strategies that involve air power. Then the one strategy that involves naval power is a blockade, a maritime blockade. And in this case, the Iranians are blockaded by the US Navy. Then the final option involves

the army, and this is a ground invasion. This is a land attack against Iran. The United States could try and conquer an island or two that belonged to Iran in the Persian Gulf. It could, the United States could try to invade the Iranian mainland. It could concentrate on all of the territory that Iran controls around the Strait of Hormuz for the purpose of trying to open the Strait of Hormuz with land power. So those are the five strategies that the United States had on its menu. Now, let me switch gears and describe which strategies the United States used at which points in time. And then I wanna analyse them. And of course, when I analyse them, what I'm going to try to do is explain why those strategies failed to achieve the goals that the United States was pursuing when it started the war on February 28th.

But to go to the description, on February 28th when the United States launches the air war, which lasts until April 8th, so basically a 40 day war, the United States pursues a discriminant air campaign. They start off, as almost everybody acknowledges, with a shock and awe campaign that's designed to decapitate the regime. And in fact, the United States and the Israelis are successful at decapitating the regime, and they clearly launch a shock-and-awe strategy. But it's all part of a discriminant air campaign. It's very important to understand that with a few exceptions, the United States and the Israelis do not hit power plants, civilian bridges, or oil facilities and gas facilities in Iran. In other words, it's not an indiscriminate air campaign. It's a discriminated air campaign, and it lasts 40 days. At the end of those 40 days, a ceasefire is put in place. But it's very important to understand that right before the ceasefire on April 8th, President Trump was talking about putting Iran back in the Stone Age. On April 7th he said: "A whole civilisation will die tonight." What's going on here is that President Trump, over the course of the 40-day war, is beginning to think about moving from a discriminant air campaign to an indiscriminate air campaign; that's on April 7th, he makes that comment about a whole civilisation dying. Okay, that's on April 7th. Then on April 8th, he switches gears, and we've seen him do this many times now. He switches gears and he says it's time for a ceasefire. A ceasefire comes on April 8th. Then there are actually negotiations.

You remember when JD Vance went to Islamabad to talk with the Iranians, this was on April 11th and April 12th, about putting an end to the war. Remember, we have a ceasefire starting on April 8th, the 40-day bombing campaign has ended and April 11th, April 12th, Vice President Vance is talking with the Iranians about ending the war. It doesn't work. The negotiations fail. The ceasefire basically remains in place; very important to understand that. But what we do on April 13th, the following day, April 13th, is we decide to employ a naval blockade. Between April 13th and June 17th, the United States has a naval blockade on the Strait of Hormuz, which is effectively a naval blockade on Iran. Then, on June 17th, the United States signs the Memorandum of Understanding that I described earlier. As I told you, that was basically a surrender document. This is telling you, in effect, and I'm getting a bit ahead of myself here, that the blockade did not work. So we sign, on June 17th, the Memorandum of Understanding with the Iranians and it looks like we're moving to put an end to the war. What then happens in early July is that the United States decides that it's gonna violate the Memorandum of Understanding. It's very important to understand that Article 5 of the Memorandum of Understanding says that Iran controls the Strait of Hormuz

during the 60-day negotiating period. And you understand that once the Memorandum of Understanding is signed on June 17th, we then move into this 60-day period where the two sides are gonna negotiate and deal with all those issues that are still on the table. And during this 60 day period, the Memorandum of Understanding makes clear that Iran controls the Gulf. But the United States decides in early July that it's gonna basically violate the agreement. And the United State is gonna create, with the Omanis, a channel through the Strait of Hormuz that Iran doesn't control, that in effect the United States controls. The Iranians say this is unacceptable. The Iranian start shooting at ships that go through that channel. And of course the United States retaliates and then Iran retaliates and then the United States retaliates. This is the tit for tat campaign.

So you see what's happened here. We had a 40 day air campaign, which was a discriminant air campaign, that ended, and then we went to the blockade, and now we're involved in tit for tat. It starts on July 7th; that's when the tit for tat campaign starts. And I would argue it goes up to about July 31st. So the ceasefire is now over. Remember, the cease fire was on April 8th, and you basically had a ceasefire involving Iran and the United States, Iran and Israel, and the Gulf States and Iran. You basically had a ceasefire from April 8th up until July 7th when the tit for tat starts. The tit for tat basically lasts from July 7th up until July 31st – I would argue this past Friday. The Iranians and the Americans are going back and forth, not every day, but almost every day between July 7th and July 31st. And then what happens on the 30th and on the 31st is President Trump begins to talk about going back to an indiscriminate air campaign. He's basically once again talking about driving the Iranians back into the Stone Age. And people this past weekend, this is August 1st, we're August 2nd, thinking that maybe President Trump is going to launch this indiscriminate air campaign. But what happens is, at the end of the day, on August 1st, he says, that's not gonna happen. Let's go back to negotiations.

So you remember, at the end of the 40-day bombing campaign, he had threatened to drive a whole civilisation to its death. Remember, that's his rhetoric back then. He was talking back then about driving the Iranians back to the Stone Age as well. And here he is again doing that. And in both cases, he didn't go that far. And, in fact, what he did was the next day he called for a ceasefire, the first time, April 8th, and this time he said, let's go back to negotiations. Which is another way of saying I think that he's interested now in another ceasefire so that he can negotiate. So that's my description of what happened. Now what we want to do is we want to analyse what happened and we want to pay very careful attention to why the discriminant air campaign, the blockade, and the tit for tat all failed. Those three strategies were all failed, all failed. If you listened carefully to what I said we went from discriminant air campaign to blockade to tit for tat, but we did not contemplate or move towards the land option, and we want to talk about why that's the case, nor did President Trump ever go to an indiscriminate air campaign, although he threatened it, as I tried to make clear. And we want to know why he didn't do either of those two, or employ either of these two strategies.

So let's go to the discriminant air campaign, the 40-day campaign. Truth is, it just didn't work. There was no evidence as that campaign wore on that the Iranians were going to throw up their hands and surrender. The shock and awe campaign, the decapitation strategy, which came at the beginning, didn't work and we continued to bomb. Most estimates say that the United States hit over 13,000 targets. You want to think about that. This is not the Israelis. We can't get a good number for the Israelis, but the Americans alone hit 13,000 plus targets in that 40-day campaign. This is a strategic bombing campaign. But the Iranians were not showing any signs of quitting. Furthermore, the Iranian's made it perfectly clear during that campaign that they had the ability to retaliate, and retaliate they did. And they were inflicting massive punishment on American bases in the region, on America's Gulf State allies and on Israel itself. So the Iranians were doing quite well for themselves in the fight. All the time this is happening, people are deeply worried that the war goes on and on and on like this, that number one, the United States is going to run out of munitions because we only have a limited number of offensive munitions and defensive munitions to protect ourselves, our allies and the Israelis against incoming ballistic missiles from Iran. So, the inventory of offensive and defensive weapons is being run down, the Iranians show no signs of quitting, and furthermore, they are retaliating in serious ways that threaten the world economy. So what does President Trump do?

What President Trump does as we move towards the end of the 40-day war is that he threatens to go to an indiscriminate air campaign. Just think about that. He's thinking about going to an indiscriminate air campaign. He's talking about bombing the Iranians back to the Stone Age because the discriminated air campaign has failed and he sees this as the best alternative. But what happens is he does not pursue that strategy. He does not. What he does is after threatening to wipe out the Iranian civilisation, he then, the next day, declares a ceasefire. He doesn't go up the escalation ladder. And the question you want to ask yourself is, why doesn't he do this? And the reason he doesn't do this is because the United States does not have escalation dominance. We've learned this in the 40-day war. The fact is that if President Trump goes to an indiscriminate campaign, that means he's going to hit bridges, he's gonna hit power plants, he's going to hit desalination plants inside of Iran, he's going to hit their oil facilities, he's going to destroy their oil and gas facilities, the Iranians make it clear, they're gonna do the same thing to all the Gulf States, and they're going to do a lot of the same things to Israel itself. And President Trump understands full well, he cannot prevent this. He understands that as he goes up the escalation ladder, the Iranians will go up the escalation ladder with him. And you want to remember that if, in the event this were to happen, and the Iranian's were to destroy all those desalination plants in the Gulf States and their oil and gas infrastructure, this would have devastating consequences for the international economy. And that's the last thing that President Trump wants to have.

So you see, it makes no sense to go up the escalation ladder. This is why an indiscriminate air campaign makes no sense, and it's why the next day, after making those genocidal threats on April 7th, he goes to a ceasefire on the 8th. And the ceasefire is followed by negotiations, as I said, in Islamabad. This is where Vice president Vance meets with Iranian negotiators. That fails, and he has to do something. So what does he do? Does he go back to the air war? No,

he sticks with the ceasefire, but he employs a blockade. He employs a blockade, and that starts on April 13th, and it runs until June 17th when you get the Memorandum of Understanding. But the question you want to ask yourself is, what good is the blockade? And the answer is, it's basically no good. It doesn't work. Anybody who's studied blockades understands that blockades, if they ever work, take a long time to work. They take many, many months, if not years, to strangle a country the size of Iran. So it's no accident that between April 13th and June 17th, that's just a little over two months, we've made very little progress in causing the Iranians to throw up their hands and say, I quit. Therefore, having failed with the air war, and that's the discriminated air campaign, being unwilling to go to an indiscriminate air campaign, having failed with the blockade on June 17th, President Trump signs the Memorandum of Understanding. And as I made clear at the top of the show, that's a surrender document.

Okay, after President Trump signs that agreement, he can't bring himself to stick to it. The thought of the United States losing, the thought of Donald Trump losing a war that he started to Iran is just unacceptable. So he begins to challenge, to undermine the memorandum of understanding. He begins to look for ways to put pressure on the Iranians, again, to get the Iranian to throw their hands up. And this is the start of the tit for tat campaign, right? As I said to you, as soon as the Americans established this channel in the Strait of Hormuz, contrary to what's in Article 5 of the Memorandum of Understanding, the Iranians start shooting at ships that are going through that channel. We retaliate with air attacks and the Iranians then retaliate against us. And of course we retaliate, they retaliate and we're going up the escalation ladder. But it's just tit for tat. And what you wanna understand here, is that a tit for tat air strategy is much less ambitious than that strategic bombing campaign that we waged during the first 40 days of the conflict. And you just say to yourself, if that strategic bombing campaign, even though it was a discriminating bombing campaign, one that discriminated in terms of the targets, it was still a substantial bombing campaign, 13,000 plus targets by the United States alone, if that, right, couldn't bring the Iranians to their knees, why would anybody think that a tit for tat strategy is going to bring the Iranians to the knees? And in fact, it didn't. And in fact, the tit for tat strategy was causing the United States huge problems. In fact, we were beginning to move our military assets out of the Persian Gulf back to Jordan and back to Israel. And what did the Iranians do? They started targeting Jordan, and they were doing substantial damage to American military assets in Jordan, which is outside the Persian Gulf. All of this just shows you that escalation dominates, whether you're talking about the discriminant air campaign or the indiscriminate air campaign, or you're talking about tit for tat, you go up the escalation ladder in either of those three cases, and it's not clear that America wins. And in fact, it's clear to me that Iran wins.

So the end result is that President Trump, late on Saturday, this is August 1st, I believe it was August 2nd in Iran, said: I'm not gonna try to bomb Iran back to the Stone Age and what we now have to do is we have to go back to negotiations. Now keep in mind here that there were two strategies that we never employed. We never employed the indiscriminate air campaign, number one, and I explained why that was the case; we do not have escalation dominance as you go up the escalation ladder to that level, right? And then we did not pursue a land

campaign. And let me say a few words about that. To actually conquer the Strait of Hormuz, I believe, would involve more than 100,000 troops. It would involve a huge fighting force, and many Americans would die in the process. There is no way that President Trump is willing to do that. In fact, there's no way the American people would tolerate that, which, of course, is one of the reasons that President Trump never went down that road. We would need, in other words, a good 100,000 combat troops, maybe 150,000 combat troops in the Persian Gulf to conquer enough territory to control the Strait of Hormuz. And if you were talking about conquering all of Iran the way we conquered all of Iraq in 2003, you're talking about hundreds of thousands of troops. That was not going to happen. We were not going to try to conquer all of Iran, we were not even gonna try to conquer enough territory to control the Strait of Hormuz. So what people ended up doing was talking about conquering an island or two in the Persian Gulf that belonged to Iran. But President Trump was not even willing to do that. And if you look at the number of combat troops that we had in the Persian Gulf, it's quite clear that we were never serious about even trying the land option. I would estimate that at the most we had 8,000 combat troops, 8,000 troops that you could use for land attack in the Persian Gulf at any point since February 28th. And 8,000 troops trying to conquer even an island in the Persian Gulf against the Iranians in the heat of the summer would be an almost impossible task. But furthermore, what if we did conquer an island? What would be the result? What's the story that one might tell about how conquering an island puts an end to this war? How does conquering an island get the Iranians to throw their hands up? The answer is it doesn't. We have no land option here. We don't have the troops. We don't have the stomach for a land war. And a minor attack on an island or landing somewhere on the coast of Iran, has little effect on the outcome of the war. So there's no land option, number one.

Number two, there's no indiscriminate air option. Strategic bombing of an indiscriminate sort, going against the entire target set inside of Iran. That doesn't work either. So you're left with three strategies, a discriminatory campaign, which we tried and failed, a blockade, which we tried and failed, tit for tat, which we tried and failed and here we are. So the question is, what do we do moving forward? Well, it seems manifestly clear to me that we've tried all the strategies that are available, and they have not worked unsurprisingly. And the two strategies that we have not tried are not a solution to the problem. And to go back to the goals, we have failed to achieve any of our goals up to this point. It's manifestly clear when you look at the Memorandum of Understanding signed on June 17th. And when you just think about where we are today in terms of those goals and in terms of who controls the Strait and what's happened to our basing structure, what's happened to our alliance structure in the Gulf, it's clear that we've lost. We have failed to achieve our goals, and worse. And this is reflected in the June 17th Memorandum of Understanding. As I said to you, if you look carefully at that memorandum, it's a surrender document. So what is President Trump gonna do now?

Now, I would point out that when it comes to President Trump, you can never be absolutely certain what he will do. And in a situation where he's desperate, and he is desperate because he is surely sophisticated enough to know that he is in deep trouble in this war and that he has in effect lost the war, so he may lash out and he may do something foolish. But assuming that's not the case, he really has no choice at this point but to pursue another Memorandum of

Understanding to try to get a deal with the Iranians as quickly as possible. I want to point out two things here. One is, President Trump would have been much better off cutting a deal immediately after the April 8th ceasefire, when the bombing campaign failed, the discriminant air campaign failed on April 8th, he moved to a ceasefire, he should have then tried to cut a deal. Furthermore, when the blockade failed, and he signed the Memorandum of Understanding on June 17th, he should have stuck to that Memorandum of Understanding, and he should've gone to great lengths to work out a deal with Iran to put an end to the war. But as I told you, he didn't do that, instead, he tried to violate Article 5 of the Memorandum of Understanding, we got in this tit for tat strategy for almost the entire month of July; it failed. And now I'm telling you it's time to cut a deal, although I'm arguing that it would have been smarter to cut the deal earlier.

One final point on this is that it's gonna be tougher to get a Memorandum of Understanding from the Iranians moving forward that is as good as the Memorandum of Understanding that the President signed on June 17th. The Iranians are more aware than ever that they're in the driver's seat. They're more aware than ever that President Trump is in deep trouble and that he needs an agreement. So they're gonna drive a hard bargain or a harder bargain, for sure, than they drove in the run-up to the June 17th Memorandum, and a harder burden, I believe, than they would have driven back in April after a ceasefire was declared on the 8th. So there's no question that President Trump and the United States is in really deep trouble here and getting a peace agreement is going to be not an easy task. But the bottom line, and this is where I'll stop, is that President Trump has no choice. He has no military strategy that he can employ to reverse the dire situation that he finds himself in. The fact is he foolishly started a war on February 28th, that he was destined to lose. Many of his advisors understood fully well that the strategy that he is employing, this is the discriminated air campaign that I described earlier, was destined to fail, and fail it did. And there was no viable alternative strategy, and there still is no viable alternative strategy. So it's time to cut a deal. But that is not gonna be easy for him to do. So let's just hope that things work out that in the month or months ahead, he's able to put an end to this war once and for all. Thank you very much for listening to my video and I look forward to the next one.

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