



Episode 11: Trump Can't Bluff Iran into Surrender

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John Mearsheimer: It's hard to believe that President Trump would be foolish enough to launch a land invasion but if he does, he's not going to succeed. And it's just going to make his situation worse. All this is to say we have no military option here. We have no military option today and we're not going to have a military option after the midterm elections. Hello, everyone. This is John Mearsheimer. And the subject I'd like to talk about today is the Trump administration's latest strategy for dealing with the Iran War. In other words, the Trump administration's latest strategy for winning the war against Iran, getting the Iranians to surrender to the president's demands. And what is happening for the past few weeks is that the administration has been waging a propaganda campaign in the mainstream media to convince the Iranians that they're doomed and that the tide has clearly turned in America's favor and they better cut a deal now – the sooner they cut the deal the better for them because we are inflicting massive punishment on them and in fact President Trump is threatening to annihilate Iran if it doesn't surrender. Now, the mainstream media, unsurprisingly, is dutifully playing along with the administration and all of the claims that the administration makes about what's happening and what that means for Iran are repeated endlessly in the mainstream media. You see this even in outlets like Al Jazeera and certainly in outlets like The Wall Street Journal. And I would also note that hardly anyone ever throws any cold water on the claims that the administration makes. It's really quite remarkable. The administration says it's going to move these military forces to the Middle East, and it's going to have such and such an effect. And nobody really assesses whether these claims make any sense. And what I'd like to do in this episode is explain to you exactly what I think the administration is up to with this propaganda campaign and tell you why I think it is not going to work. I think this attempt to, in effect, hoodwink the Iranians into surrendering, convincing them that they are doomed and they are on the verge of catastrophic defeat is not going to work. And it's not going to work in large part because the facts tell you otherwise, and furthermore, it's, in my opinion, almost impossible at this point in time to fool the Iranians into thinking that it's time for them to surrender.

Now, the way I'd like to proceed is to describe the two prongs of the administration's approach. There's an economic prong, and then there's a military prong. It's a two-pronged approach. And what I want to do is describe each of those prongs, starting with the economy

and then going to the military, and then in reverse order explain to you why I think that the administration's claims are bogus. So, let me start off with what's going on in the economic realm. First of all, the administration is arguing that the blockade coupled with Secretary of the Treasury Bessent's policy of strangling Iran's economy by cutting it off from its economic dealings with the rest of the world is working. In other words, this two-part offensive, this two-part economic offensive – part one, the blockade, part two, the Bessent strategy, what's sometimes called Operation Economic Outcast – that these two things are throttling the Iranian economy to the point where it is collapsing. That's the sort of first strand of the economic argument. The second strand of the economic argument is that we in the West are actually doing very well because large amounts of oil are now coming out of the Persian Gulf. And in fact, there's almost as much oil now coming into the Gulf as there was on February 27th, which of course was before the war started. So the Iranians efforts to shut down the Strait of Hormuz have failed, and in fact, we're basically back to a point where the flow of oil is coming out at normal rates. And this means that we have time on our side. There's no need for the United States or the West more generally to cave in to Iran. And again, the first part of the argument is that the Iranian economy on the other hand is in danger of going off a cliff, in fact, is about to go off a cliff. So that's the economic argument that the administration is spinning. And again the mainstream media tells time after time.

Then there's the military dimension. Now, it's very important to understand that nothing is going on of any consequence at the military level at this point in time. There's no bombing campaign on the part of the United States or any of its allies. And furthermore, there's no evidence that ground forces are going to be inserted any time soon. But what's happening is the administration is making a big deal out of the fact that it is sending 10,000 more troops to the Gulf. And furthermore, it is moving another aircraft carrier into the Gulf. According to conventional wisdom, there are two carriers already there. Which means that when this new carrier, this is the USS Teddy Roosevelt, when the USS Teddy Roosevelt arrives, we'll have three carriers. The other two carriers, and I'll talk more about this as we go along, are the USS George Washington and the USS George H.W. Bush. So with the addition of the Roosevelt, you'll have three carriers, which is a formidable strike force, so the argument goes. And in addition, you're introducing 10,000 more troops into the region. And there are already about 50,000 troops in the region. So 10,000 more troops plus the 50,000 troops that are there means that you will have about 60,000 troops in the region, and you will have three carriers. And the argument is that the United States will countenance using military force and in fact use military force if necessary after the midterm elections. So it'll take some time to get these additional forces to the Gulf and once they get there and everything is set up, this will be after the Midterm elections, then President Trump will be free to use that military force, both the naval air power and the ground power to bring the Iranians to their knees if that's not already been done through economic means by that point in time.

So what do we make of this propaganda campaign? What do we make of the effort by the administration to spin a story that Iran is in deep trouble and we're in a position where we can finish it off both economically and militarily? As I said, I think the story is deeply flawed, and let me explain to you why. And let me start with the military part of the story, and let start

with business about the carriers and the air power that will be coming off of those carriers that will finish off Iran after the midterm elections. First question you want to ask yourself is, if we had a 40-day strategic bombing campaign between February 28th and April 8th, and it failed, why does anybody think that this new strategic bombing campaign, which is going to come with the addition of carriers to the Gulf, is going bring the Iranians to their knees? I mean, how do you get a military victory this time when you couldn't get it in the 40-day campaign? The other point, which is of enormous importance, is that almost everybody agrees that we have a munitions crisis. And one of the reasons that the United States is not now engaged in bombing Iran or engaging in tit-for-tat strikes with the Iranians is because we have a significant shortage of munitions. So the question you want to ask yourself is, how are we going to overcome that munitions problem after the midterm elections? And even if we do overcome that munitions problem after the midterm election, doesn't the previous 40-day bombing campaign tell us that this campaign is unlikely to work as well?

There's another reason to doubt that this air campaign will work and it has to do with the three carriers' argument. I said, the clear implication is that once the USS Teddy Roosevelt gets there, that carrier in addition to the USS George Washington and the USS H.W. Bush will give us three carriers which can be used to attack Iran. But if you actually look carefully at what's happening here, it's apparent that Roosevelt is being sent to the Gulf region to replace George Washington. It's not going to be sent there to work alongside the George Washington. It's being sent there to replace it. Furthermore, despite the fact that people pretend that the USS George H.W. Bush is still in the region. The fact is it has left the region and it is now in Thailand. And indeed there is only one aircraft carrier in the Gulf at this point in time. I shouldn't say in the Gulf, in the Gulf region, because we wouldn't dare put a carrier inside the Gulf for fear it would be sunk almost immediately. So it's in the region. So we only have one carrier there, and that, of course, is the Washington. And the Roosevelt, once it gets there, is designed to replace the Washington. This tells you that we're going to end up with only one carrier in the region, not three carriers. Now, you say to yourself, well, we could always move two other carriers back into the region and bring it up to three. I don't think that's true. I think the most you can hope for is two carriers in the regional. But even there, you're going to have all sorts of problems. And the reason is quite simple. The problem is that the operational tempo that the Navy has been working at for months now is so great that it puts huge demands on the US Navy. US Naval commanders are constantly saying that this tempo cannot be sustained over the long term. We're pushing the Navy to the brink. So the idea that you can bring back three carriers and keep them there for a sustained bombing campaign, I don't think that's correct. I think you'd be lucky if you can get two carriers there. And as I said, even if you get two carries there, just think about what happened with the 40-day bombing campaign. Think about the fact that we have a significant shortage of munitions. What are those two carriers going to do to bring the Iranians to their knees? There's another problem you want to think about, and that is the fact that because we've lost naval bases in the Gulf region, we are heavily dependent on a supply structure that reaches back to Diego Garcia, which is 2,500 miles away. The logistical requirements of sustaining three carriers in the Persian Gulf region are very, very great, very difficult to do. So you see, from a logistical point of view and from the point of view of the state of the US Navy today,

sustaining three carriers for any appreciable period of time is going to be extremely difficult, if not impossible. Then my final point here is that some might say that there's a simple solution to this problem, and that is that what we need to do is use that carrier-based air and other air assets in the region to strike oil infrastructure inside of Iran and wreck all of the oil infrastructure that Iran has and, in effect, wreck the Iranian economy for the long term. The problem here is that the Iranians have a second strike capability. The reason that we have not attacked Iranian oil infrastructure in any meaningful way up to now is our great fear that the Iranians will do the same to the oil infrastructure inside of the various Gulf states and inside Israel as well. This is a major problem. So you want to remember that Iran has a second strike capability if you really want to play hardball and go after its energy infrastructure. So that's the air dimension.

Now, let's turn to the ground dimension, the military forces that are being brought in for a possible invasion of Iran. The reason you would bring additional ground forces into the region is because you're going to threaten to invade Iran. And in fact, there is a lot of talk in the mainstream media about that. Many people see these 10,000 additional forces that are coming into the region, on top of the 50,000 that are already there, as evidence that we're finally getting serious about invading Iran. This is not a serious argument. The thing you want to remember about that number, 60,000 troops in the region, 50,000 there, 10,000 on their way, is that all of those forces cannot be used for the purpose of invading Iranian territory. The only forces that really matter are the combat units. You need combat units. You need brigades or battalions or divisions filled with combat forces and the attendant supporting air power to fight against Iran on the ground, to invade Iran. So, what we have to do is we have look at that number of 60,000 and figure out how many of those 60,000 troops are in combat units that can be used to invade Iran. I think that at the most there are 7,500 troops at the most. 7,500 troops that could be used to invade Iran inside that 60,000 number. Now, how do I get to that number? First of all, if you look at these 10,000 troops that are being sent to the Middle East along with the carrier, the USS Teddy Roosevelt, there are only about 2,200 troops among the 10,000 who can be used in a combat operation involving an invasion of Iranian territory. There's a Marine Expeditionary Unit, the 13th Marine Expeditionary Unit, that is inside those 10,000 troops. And that Marine Expeditionary Unit includes 2,200 troops. The rest of the military forces among that number of 10,000 are sailors on the Roosevelt, sailors on other ships that are coming along with the Roosevelt. They're not combat troops that could be used to invade Iran. There are only 2,200 troops among the 10,000 that can be used for that purpose.

Now, let's talk about the 50,000 troops inside of the Middle East at this point in time, before the 10,000 additional troops arrive. If you look at those 50,000 troops, there's a Marine Expeditionary Unit already there in the Middle East – this is the 11th MEU. That's another 2,200. There are approximately 2,000 troops there from the 82nd Airborne. And I would guess that there are another 800 troops there that have been stationed in the region for a long period of time, before the war started. I think there are about 800 ground forces in and around Kuwait. So that tells you that in the region right now you have 2,200 Marines, you have 2,000 troops in the 82nd Airborne, another 800 in this military force that's been there for a

long time, and then, of course, coming into the region, you have another 2,200 troops. And if you add this all up, it's slightly under 7,500 troops. Those are the combat forces that are available for an invasion of Iran. Now, the question you have to ask yourself is, what can you do with 7,500 troops? And I like to say, even if you multiplied that by two and you got to 15,000, or you multiplied it by three and you're up around 22,000 – it wouldn't make any difference. The force would be far too small for purposes of invading Iran. Now, why do I say this? General Barry McCaffrey, a four-star retired US Army general who has looked carefully at this issue, maintains that you would need a force of 150,000 combat troops. 150,000 combat troops. And you would have to fight somewhere between three to six months just to take over the Strait of Hormuz. You want to think about that. McCaffrey is talking about the number of troops that are required to take over the Strait of Hormuz, and he's telling you, you need 150,000 and you're going to fight for three to six months. What do we have? I think we have about 7,500 troops at the most. Maybe if you double that, you get up to 15,000. But do you really think that 15,000, which is one-tenth of the number that McCaffrey is using, is capable of taking the Strait of Hormuz. And then, of course, you have to sustain those troops there over the long term, which is no easy task.

Let me just give you another case that illustrates the problem here. When the Russians invaded Ukraine in February of 2022, I estimate that the Russian army went in with about 190,000 troops. 190,000 troops. That was not enough to take and keep all of the territory that they initially conquered. 190,000 was not enough. You want to remember that Iran has twice the population of Ukraine and the terrain in Iran is much more formidable for the invading force than the terrain in Ukraine has been for the Russian attacking forces. So the idea that we can invade Iran or take back the Strait of Hormuz with 7,500 troops is simply not a serious argument. Let me make two additional points to drive this home. First of all, can you imagine what the public reaction would be in the United States if American soldiers start coming back in body bags in large numbers? The opposition to this war is already great. There was significant opposition to the war as soon as it started. And if anything it has increased with time. If at this point President Trump decides to launch a ground invasion, and large numbers of Americans die, and it looks like it's going to take us many months to succeed, and maybe we won't even succeed, the public outcry would be huge. One additional point, to actually get those Marines in those two Marine Expeditionary Units – remember the 13th Marine Expeditionary Unit is coming into the region, and the 11th Marine Expeditionary Unit is already there – those Marines are on amphibious attack ships. And you would have to take those amphibious carriers, and you would have to drive them up to the Iranian coast to get the Marines onto the landing zones. The United States Navy doesn't want to move large ships like those amphibious carriers anywhere near the Iranian coast for fear that the Iranians will launch a cruise missile and sink the ship. So the question I would ask is how are we going to get those Marines who are on those amphibious carriers onto the beaches? This is going to be a formidable problem, to put it mildly. But again, even if you get the Marines onto the beaches in the final analysis, it's not going to matter because the fact is we don't have enough troops to invade Iran and win in any meaningful way.

Now, let me switch from talking about the military dimension to talking about the economic dimension and start with the claims of the administration that we are inflicting massive pain on the Iranians and they are about to surrender. There's no question that the United States is inflicting massive pain upon Iran. There is no question the blockade and the Bessent strategy and everything we did before this war started has served to punish the Iranian people in significant ways. We have done enormous damage to the Iranian economy. I have no doubt about that. But the question we have to ask ourselves is do we think that given all that pain the Iranians are about to throw up their hands and surrender? I don't think so, and I think there are three good reasons that this is not going to work. The first has to do with the historical record. I do not know of a single case in the historical records where you had a major war and where one side was able to bring the other side to surrender through economic means alone, through a blockade alone. There's no question, for example, that in World War I, the blockade by Britain and the United States at the end of World War I had a devastating effect on Germany and its allies, especially Austria-Hungary. And it played a role, for sure, in causing Germany to surrender on November 11th, 1918. No question the blockade mattered. But as everybody knows, from August 1st, 1914, up until November 11, 1918, you had a huge ground war, not only on the Western front, but also on the Eastern front. Many millions of Germans and allied soldiers died in that conflict. So it wasn't the blockade alone that caused the Germans to throw up their hands. It was the ground war that was mainly responsible. The ground war on the Western front, the ground war on the Eastern front. We have no ground war here, and I don't even think we have a viable air war. So what we're counting on here, basically up to this point, is using a blockade plus the Bessent strategy to bring Iran to its knees. But again, there's no historical example that tells us that we should be confident this is going to work. The second reason it's not going to work, in my opinion, is that the United States and Israel, of course, present an existential threat to Iran. President Trump has recently talked about annihilating Iran. By my count, on at least seven occasions he has talked, in effect, about annihilating Iran, wiping it off the map of the earth. The Iranians surely understand that this is an existential threat that they are facing when they go to war against the United States. And if you're facing an existential threat, you fight to the last person. It's hard for me to imagine the Iranians surrendering, even though they are suffering greatly because of US economic policies towards Iran. I fully understand that, but they are facing an existential threat. And again, when you face an existential threat, I make the argument that surrender is not an option.

My final point is that, let's assume I'm wrong, let's assume that the economic sanctions are so formidable, so damaging to Iran that it understands that it is at the end of its rope, it can't go on – what happens then is that the Iranians will escalate. The Iranians have a retaliatory option here. They can strike out at the energy infrastructure all across the Gulf and in Israel itself. And they have the ability to do enormous damage. Furthermore, they can strike out at desalination plants all across the region and do enormous damage to countries like Saudi Arabia, Kuwait, and even Israel. Again, the Iranians, if they're pushed to their limit, will retaliate. And if they retaliate, they will do enormous damage, not only to each of those countries that they target. One could argue that if they go after Saudi Arabia's oil infrastructure and its desalination plants. They can basically ruin Saudi Arabia as a

functioning society. But it's more than that. The consequences for the international economy of Iran launching a full-scale attack on energy infrastructure and desalinated plants all across the Middle East, or all across the Persian Gulf region, would be devastating. So, I think that we should probably hope that we don't end up pushing Iran to the point where it turns to that doomsday response.

Now, let's talk a little bit about what's happening on our side of the equation. Because you want to remember the economic argument has two dimensions to it. One is that we are throttling the Iranian economy or pushing the Iranians to the point where they just have to quit. That's the first part. But the second part of the argument is that we are doing very well. And in fact, as I said before, if you look at the amount of oil that's coming out of the Gulf, we're basically approaching pre-war levels and if anything the situation just gets better with time – this is the conventional wisdom. Two points on this: Number one, you want to understand that the Iranians are not just sitting there and letting this happen. In fact, there's a piece in The Wall Street Journal today with the headline New Strait Attacks Threaten Oil Flow. And what The Wall Street Journal says in the story is that the Iranians have adjusted to the existing situation, and you're getting new attacks and more sophisticated and more effective attacks by the Iranians, and the flow of oil is beginning to slow down. To take this a step further, as everyone knows, there is the war involving Iran on one side and the United States on the other side, but there's also a war between Saudi Arabia and the Houthis. And the Houthis are attacking oil installations inside of Saudi Arabia. And there were reports in today's newspapers that the Houthis have hit the oil pipeline that Saudi Arabia depends heavily on to get oil out to the Red Sea and out into global markets. And furthermore, there are all sorts of Saudi oil installations, that are big, fat, vulnerable targets that the Houthis can go after and they may very well go after, because the war between the Houthis and the Saudis is heating up. So, if you think about the flow of oil out of the Gulf, which is admittedly moving at rates that are not that far away from what the rate was on February 27th, you see that we are probably headed back in the other direction because of the fact that the Iranians are becoming more effective at cutting down the flow of oil out of the Gulf, and the Houthis are threatening critically important targets in Saudi Arabia that will reduce the Saudis' ability to export oil.

It's hard to say exactly where this situation is headed, but there's no reason to think it's going to remain as favorable down the road as it is today. But even if it does not change much at all, and lots of oil continues to come out of the Gulf as it's been happening for the past two or so weeks, is this really going to matter? I'm not sure it is. If you look at inflation rates around the world, especially the reports that are now coming out on inflation rates in Europe, if you look oil prices in the United States and other places, if look at bond yields, if you look at the cost of diesel, it's you look at the cost of getting a mortgage here in the United States – if you look at all these economic indicators, all the evidence is that even though oil has been flowing out of the Gulf, we are still in deep economic trouble. And there's hardly anybody I see in the media arguing that all of these problems, or most of these problems, are going to be solved anytime soon. All of this is to say the Western economies – and not only the Western economies, economies and countries in Asia even more so – are in deep trouble as a result of

what's happening in the Gulf. And there is no evidence that this restoration of oil flows out of the Gulf to levels that approximate what we had on February 27th have done much to solve the problem.

The bottom line is this propaganda campaign is not going to work. Again, the propaganda campaign has two dimensions to it. One is the military dimension. And as I made clear, we are not going to be able to bring the Iranians to their knees with the addition of a US aircraft carrier in the region, even if we end up with three carriers there, which is highly unlikely. The idea that we're going to be able to bring the Iranians to their knees with a land invasion is, I think it's fair to say, a laughable argument. This is not going to happen. It's hard to believe that President Trump would be foolish enough to launch a land invasion, but if he does, he's not going to succeed and it's just going to make his situation worse. All this is to say we have no military option here. We have no military option today, and we're not going to have a military option after the midterm elections. There's no question the administration can spin a story that says we will have that option, and there's no question that the mainstream media will play along with that. But facts are facts. And the fact is here we don't have a military option. With regard to the economic side of the equation, again, there's no question that the United States is inflicting massive pain on the Iranians. But as I said, there is no evidence that that has brought them to the point where they're close to surrendering. There's nothing in the historical record that makes us think that should be the case. And if I'm wrong and it does become the case and they feel like they're about to go off a cliff, they'll take everybody off that cliff with them. And that will be disastrous for the international economy. It will be disastrous for President Trump. And in no way will he be able to say that he won. The bottom line, again, is that the facts tell us that this propaganda campaign is not going to work, that you cannot bamboozle the Iranians. At this point in time, they're just too smart, they are too knowledgeable, they're too experienced in dealing with the United States to allow themselves to be conned into thinking that we have the upper hand, that they're on the verge of defeat, and therefore it's time for them to throw up their hands and surrender. That concludes my episode for today. Thank you very much for listening, and I look forward to the next episode.

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