

USA Out of Options, Iran's New Zero-Tolerance Strategy | Dr. Arta Moeini

As operation "Economic Furry" or "Economic D-Day" is still born, the USA once again resorts to strikes on civilians to terrorize the nation of Iran. But Tehran already gave its answers by striking at US bases in Jordan, in "hot pursuit" of the fleeing US troop deployments. Dr. Arta Moeini, managing director of U.S. operations at the Institute for Peace and Diplomacy, assesses the Iran-US war, competing Iranian approaches to deterrence and escalation, the Strait of Hormuz, and Iran's strategic resilience. He also introduces Reclaiming America First, an initiative examining a realist US foreign policy and a post-American regional order in the Middle East. Links: Arta Moeini: <https://peacediplomacy.org> Arta Moeini on X: <https://x.com/ArtaMoeini> Welcome to Fortress Iran: <https://unherd.com/2026/08/welcome-to-fortress-iran/> Neutrality Studies substack: <https://pascallottaz.substack.com> Merch: <https://neutralitystudies.com/shop> Donation: <https://neutralitystudies.com/donate> Timestamps: 00:00:00 Introduction and Iran war update 00:01:04 Fortress Iran and US strategy 00:05:58 MOU violations and Hormuz blockade 00:14:04 Iran's leverage and escalation options 00:22:08 Competing Iranian strategic approaches 00:28:48 Proportionality, deterrence and initiative 00:37:21 Can Iran sustain a long war? 00:44:48 Strategic loneliness and external partners 00:56:48 Reclaiming America First

#Pascal

Welcome back, everybody, to Neutrality Studies. Tonight, again, with an update by Arta Moeni, the Managing Director of U.S. Operations of the Institute for Peace and Diplomacy. Arta, welcome back.

#Arta Moeini

Thanks, Pascal. Great to be back with you, as always, and discuss all the crazy developments.

#Pascal

Yeah, I mean, crazy developments indeed, because the United States and Iran are fighting again. And you are the author of a recent piece that I've got here with me, "Welcome to Fortress Iran: Mojtaba Khamenei Is Building a Hardened Confrontational State," in which you actually are predicting quite a lot of things that are happening as we speak. Can you maybe walk us through what your analysis of the Iran-U.S. war, or the U.S.-Iran war, is, and where we stand today as we speak on the 2nd of September?

#Arta Moeini

Yeah, we have officially entered the seventh month of the war. And this war, I'm afraid, doesn't look like it's going to slow down. The Iranian changes in leadership, which is what my article at UnHerd was about, was a bold signal to the United States. It was a way to let the other side know that we are serious about protecting Iran's sovereignty, and we're not going to back down on the threat and force question. The Trump administration seems to have had this realization that an intense conflict is something that it cannot afford or it cannot continue on.

And therefore, it wants to sort of go back and restore the status quo where Iran was in January of '26, where there were no kinetic strikes, but Iran was squeezed politically, financially, and economically. That was the intention behind the D-Day, the naval blockade, which is basically the hybrid or economic warfare of the Trump administration against Iran. And Iran was already then signaling that it cannot abide by this. It cannot allow this to keep on going. And it was also signaling to the Trump administration that it will punish Donald Trump's presidency if Donald Trump does not come back to the MOU. Obviously, in Washington, people did not take any of this seriously.

And we are back into this tit-for-tat escalation, it seems. But from an Iranian perspective, it's very clear that what the United States was doing, which was both the sort of financial assertions, if we can call it that, as well as the push towards this other southern corridor through Oman, which was supposed to challenge Iran's control over the Strait of Hormuz. And they did get some ships out through that corridor. And, you know, they hit Iranian radar systems in the south. And, you know, by turning off their transponders, they were able to do a few million barrels through that route. The question with the Iranian side was whether or not that is something that they can negotiate with the United States.

This was basically the Volubov stance, the more moderate, pragmatist, conservative stance, that the United States can only understand the language of force. And once Donald Trump came out and said, "We have now cleared all the mines," which is not true from the Iranian perspective, it was clear that Iran can no longer stand by and allow for Donald Trump to make his narratives, to basically stabilize the global economy with the narrative tropes. Iran's leverage ultimately is economic. It holds the world's economy in a stranglehold through the choke point of the Strait of Hormuz, from which 20% of oil flows. And so it's not going to let this, you know, let this go.

And I think it's very clear that we are going to be in for a much wider escalation because Iran just cannot, you know, let Donald Trump get what he wants, which is a low-intensity conflict of, you know, just getting American or American-aligned ships through the Strait of Hormuz, Saudi Arabian, Emirati, and otherwise, while punishing Iran with what they call defensive strikes in the south, as well as squeezing Iran's economy financially through the naval blockade. So the combination of this plus what's happening with Israel and Lebanon is considered a total and utter violation of the MOU that Trump himself signed. And so it's very hard for even the sort of diplomatic elements in Iran, the Araqchis, the Qalibafs, to argue that we need to just go back and, you know, have any kind of a peace deal with the United States when America is acting effectively as a belligerent power here.

#Pascal

Yeah, but, I mean, isn't this the problem from the beginning, that the United States keeps pretending that diplomacy is on the way while it actually then starts attacking and destroying and backstabbing Iran? And actually, I mean, even right now, I mean, the whole idea of defensive strikes is basically offensive strikes, right? It's like attacking Iran with the pretense that you are just doing it to prevent attacks that haven't happened yet, and just grinding down Iran bit by bit because apparently the United States, again, mistakes Iranian restraint for weakness. And Iran is constantly actually asked to put its foot down, which it's trying to do. But again, like, the United States, anytime Iran then strikes back, interprets that as—or not interprets that, but at least touts that as—Iranian aggression. Yeah. How do you think that Iran is going to go through that now?

#Arta Moeini

Yeah, grinding down is absolutely 100% the key term. Again, the U.S. strategy, the original objectives of this war obviously failed. The decapitation strikes did not produce the intended results. As I had written for another piece that I think we discussed earlier, it strengthened the Iranian political system. It brought everyone together. It created a consensus about defense, and it was an existential crisis. The argument now is that, has that existential moment gone away? And I think it's very clear, if you're an Iranian observer, that that's not the case. You know, the country is under even more economic hardship than it was. It's blockaded. And the counterpart that you're trying to negotiate with reneges on almost any promise that it gives you, right?

So there's a ceasefire after the 12-day war. Then Trump violates it by full-on decapitation strikes against the Iranian government and the political system. Then there is the question of, you know, let's have a truce in April. That truce is violated immediately after the Islamabad talks. Then there is the MOU itself, which Donald Trump signs in a ceremony in Europe, and I think at Versailles, of all places. And that also is immediately violated. The terms of the MOU were immediately violated in 48 hours, with Rubio's team going to negotiate with the Lebanese, the pan-Lebanese government, effectively, which works with the United States and Saudi Arabia.

And basically squeeze out Hezbollah's positions. And that is interpreted as a violation immediately, as well as this southern corridor path. Again, if you look at the MOU, it's very clear in paragraph five. It talks about how it's Iran that will decide. Basically, there was a 60-day window, and within that 60-day window, then Iran will also work with the other states, which is a stakeholder of the state of Oman, to create a new mechanism. And it doesn't say that there will not be any kind of a fee. It doesn't say that America will create its own mechanism, own version of sort of either a toll system or a security system. So it has no mention of the United States in that paragraph. That is by design. It's not up to interpretation.

It says what it does for a reason. The negotiators spent hours deciding the terminology, and the terminology was to exactly prevent this kind of escalation from returning, which was, again, Iran

accepted basically an opening of the Strait of Hormuz to commercial vessels, and it was committed to doing so. It was the American interference through the southern corridor and other kinds of machinations that made Iran then have to try to close the Strait of Hormuz again. And keep in mind that the naval blockade by itself is a violation of the MOU. So today, Iran is very clear in terms of how its leverage and its limited options cannot stand more compromises, let's say, with the United States.

That it needs to push its leverage on the Strait of Hormuz, and that the other side only understands power and force. And so the shift that we saw with Rezaei, with the new spokesperson and head of Iran's National Security Supreme Council, that shift was to show that the realists in Iran, the ones who say, what I call security firsters, the ones who say that this can only have a military solution, that military resistance to American forces is the only way to get the United States to back down, because Donald Trump and Pete Hegseth do not understand any other language other than force. And so this would mean that Iran would, you know, actually preemptively strike United States bases, the tankers that are being pushed, as well as regionally and horizontally escalate the conflict.

#Pascal

Yeah, but this is a pretty bleak picture, actually. But I think it's an accurate one. If I was Iran and I had this memory of having negotiated over many, many years the JCPOA that was ceremonially signed in 2016 and then very unceremoniously sabotaged in 2018 and exited in '19 or '20, and then, like, the whole escalation and the deterioration under Trump one and then Biden and Trump two, and the constant, the constant breaching of all kinds of agreements or understandings that were created, what other conclusion can there be? But the problem that Iran has, of course, is that its economic leverage with the Strait of Hormuz hurts not only the United States, it also hurts its allies like China. China has an interest in having, like, proper relations, proper relations not only with Iran, but also with the Gulf states.

And the complete closure of the Strait of Hormuz is something that is kind of a problem also for Iran. But the United States knows that, and it plays with it. Plus, it has given us the indication of how it intends to get out of that, which is by stealing all of Venezuela's heavy crude, the heavy oil that Venezuela has, which is what the United States is lacking. It will still take two or three years until it can refine all of that oil, yes, for sure. But that's the U.S. kind of the Joker card to get out of prison, out of the Hormuz prison. So how do you think that Iran is now trying to, or will Iran try to increase its leverage that it has for the time being until the United States is able to refine all of that heavy crude oil?

#Arta Moeini

Yeah, so first of all, I think we've got to understand that America is energy independent. It's not that American supplies are the— The United States does not have a supply problem. What it does have is that what happens in the Strait of Hormuz with 20% of oil affects prices, even if America doesn't

have a shortage. So America can be energy independent, but its intervention in the Persian Gulf and its intervention against Iran has been destabilizing to the global economy. And you're absolutely right that China is a conservative state that wants to basically not rock the boat of international trade too much. However, the Iranian resistance—and this is the nature of an existential war—that Iranian resistance, it's not going to abide by American or Chinese concerns in this case.

It will try to accommodate certain ways or work with China to soften the blow. But Iran's strategy effectively is also against China's, because Iran's strategy is to increase the cost on the global economy and blow up the global economy with the hopes of America backing down. But also China is a major partner in the global economy, so that's something to be understood. But again, countries do have different priorities and contradictory priorities. So China is also helping Iran fight this war, as Iran's strategy might conflict with the general trajectory of how China sees its rise. From the Iranian perspective, you have a few options. You either can just try to say, you know, basically give up, go to the diplomatic table, and accept whatever the United States is telling you.

Nobody in Iran can do that. That is politically untenable. So a lot of people who talk about diplomacy are talking in those terms, and that's not going to fly. Then you have the Qalibaf section, who are basically—they are—they're happy to get back to the military posture, but they see the military option as retaliatory. So as soon as America—basically Donald Trump—comes out and says the Persian Gulf is now safe and there are no mines, guess what? Now Iran attacks two tankers, their mines immediately deployed, just to show that you're effectively full of crap, that this is a lie. Okay, so what then? The United States starts attacking Iranian islands in the south.

And so Iran's response is escalation to then attacking, retaliating against this by attacking U.S. bases in Jordan, in Kuwait, and in the UAE. And so what we're seeing is effectively Iran has warned all of the countries around the Persian Gulf that, you know, it's not going to just sit back and take this. And if you don't stop the United States, we will be coming for you. And so this version of retaliatory strikes, and then maybe Donald Trump backs down, and then there's another round of negotiations—that was effectively the Qalibaf model. And, you know, I think people there are thinking that maybe the leverage that they have is, you know, the U.S. midterms. They are very worried, or they're very concerned, or at least they're preoccupied by what the midterms look like in the United States and, you know, exacting a cost that way and getting the war to stop.

But then there is the security-first faction, the Rezaei faction, the Rahim Safavi faction. And I believe, and I was saying in the piece, that Mojtaba Khamenei, who is very much alive, from what I hear, despite all the propaganda—I don't know why we want even to pretend that our enemy is not as strong as it is, to actually be able to think about it, if we are the United States. So again, that faction close to Khamenei and Rezaei, they see this as ultimately America has proven over and over again that it is not a good partner for negotiations, for peace, for any kind of diplomatic framework. Therefore, it needs to change. We need to institute a change in the U.S. psychology, in the perception of Iranian weakness.

This is the fundamental issue, and we need to fix this by actually aggressively, unpredictably taking an offensive stance. That means that Iran should not wait for the United States to create the terms of the engagement, to create the context for the engagement. Iran should, and already has the pretext to, start attacking the United States and return to an all-out war with the United States. And that is a better situation than this limbo war and peace situation. That's the worst of both worlds for Iran. Iran wants peace and wants deterrence. But if it can't have that, it will have war. And so what does that mean for the United States? I think America actually wants to kind of drag this out until the midterms.

You know, the Republicans want to make sure that they don't pay too high a cost for the midterms and then return to a new conflict in late fall to winter. This is something that Iran just simply cannot afford to allow. So, from the Iranian perspective, the war has to be escalated and has to not be proportional and retaliatory, but proactive and disproportionate. Effectively, this group is arguing that Iran should take a page from Israel. Israel's military strategy is the madman theory, right? It's all over the place, appearing at times even irrational, but unpredictable. And so the Iranian model should be like this, is the claim, that we should not worry about, you know, we as this group, they would claim that Iran should not worry about the American elections.

It should not worry about the global economy. If these things happen, great. But Iran has the upper hand militarily. The United States is under a squeeze with munitions and stockpiles. This is the time to push your advantage. You don't back down and wait until America restocks and comes back again on its own terms. So those are effectively the two factions. But my prediction is that Donald Trump's overconfidence is actually recreating and strengthening that consensus because it's an existential crisis. That's why you saw immediately after the declarations of Bessent about the D-Day and the mines that the Iranian system, as a system, starts attacking the United States.

#Pascal

But I was wondering about that, actually, this factionalism inside Iran, because Iran, in my perception, has been quite reactive. Although I must say there is, like, systematism to the reaction, right? Because my interpretation is that Iran tried to reestablish reciprocity. As in, you attack something of ours, we attack something of equal value of yours. You could attack us with nuclear weapons. We know where your nuclear power stations are. We can blow up Dimona. We don't want to, but we could. We could destroy all the desalination plants. We don't want to, but we could. And in a sense, it succeeded because the United States and Israel stopped attacking the desalination plants.

They stopped the attacks at this highly critical infrastructure because they know that Iran will strike back at equal value. But by now, we're at the point where the United States is again slowly slicing itself into attacking Iran and then putting Iran at the point where it has to kind of retaliate in equal

value in order to stay faithful to its strategy. But that puts it on the back foot because it always gives the United States the ability to strike first. Where do you think this is taking us now? Because the logical conclusion is that the United States maintains escalation dominance.

#Arta Moeini

So again, I think that from the Iranian perspective, there is a window, and you have got to impose your advantage within this window. Iran can sustain high-intensity conflict for at least one year. So the more you wait and the more you allow America to recover, you are actually giving up your leverage against the United States. The question is whether or not this kind of proportionality doctrine... So under Khamenei, if you remember, the Khamenei senior, we had strategic patience with Iran. So in a sense, the Iranian posture was, "We will just wait, and we will not rock the boat, and then we will find a way out of this situation." Obviously, that didn't work. So Iran is no longer patient, but it's still proportional, as you mentioned. That's the Qalibaf approach.

That's the moderate, you know, the utilitarian, the pragmatic conservative faction, who basically are worried about that if they go and act disproportionately, what if the other side does as well? And so the Iranian economy and the people will be under even more pressure. However, the other side is—that's what I mean—they come from, at least in foreign policy, from a more realist camp. In a sense, they're looking at this and they're like, we have a deterrence problem, and we don't have a nuclear weapon because of the strategic patience and because of the old order. So we don't have the ultimate deterrence. So how do we reestablish deterrence in the short term, irrespective of whether or not we pursue the nuclear option and nuclear deterrence over the midterm to the long term?

So in the short term, how do you reestablish deterrence? You have to show that you have escalation dominance by attacking as hard as you can, because the other side likes short bursts of activity. Don't give it that. Again, the argument here is that within the 40-day war, after the first week or two, you saw Iranian advantage really pushing. And, you know, here the argument would be that let's not allow the United States to come back and do one-off crazy operation and go back. That's exactly the situation or the scenario that you want to avoid. You should be able to prolong this and go back to the war posture because then, over a long term, over an actual conflict, you have more of a will to fight and you have the resources to fight.

Now, given the MOU and the time period from the MOU from June to now, this group has not been sitting there eating pistachios. They have been thinking about this ultimate scenario of escalation, which means that they have been working on integrating new technologies with new kinds of defenses so that if and when the war returns to an all-out, full-scale confrontation, they have new things that they will surprise the United States with. So, again, I don't see how this—you know, I think the advantage is Iran's, and the only country that can actually, you know, take that advantage away is Iran itself. If it dithers or if it kind of acts too cautiously, Iran might actually blow all that leverage.

#Pascal

I mean, that's the one point that is so difficult for me to understand. And maybe we should ask somebody who's familiar also with the Iranian strategic planning, because, of course, you and I, we are not. It's just, it's baffling to me that even after seven months of war this year, and that excludes what happened the year before and the year before that, that even after seven months, Iran doesn't strike first. Iran could just launch a massive missile salvo against Jordan, but it doesn't. It gets attacked. It has some casualties, civilian casualties at a wedding. It launches a retaliatory salvo against Jordan, and that's it. It calls it quits at that. The United States at this point can almost bank on Iran just, you know, striking back proportionally and then call it quits and go back and be in waiting again. That just, at the beginning, made a lot of sense to me. By now, I wonder what the strategic thinking behind it is.

#Arta Moeini

Yeah, so, I mean, my interpretation of this, as I mentioned in the piece, is that, again, Iran is not—there's no factionalism in Iran. I think there's more factionalism in the United States than there is in Iran when it comes to—I mean, 80% of Americans don't want this war. The U.S. administration, the Trump administration itself, was highly divided about this war. Many people warned the Trump administration, or Donald Trump himself, against the war. And the U.S. military has raised serious objections to the war, as recent reporting has shown. So, more divides over the war in America than in Iran. The problem that Iran has is that everybody understands the existential war, and they have to fight it. So there are no divides there.

And everybody understands that they need to reestablish Iranian deterrence. There's also no divide there. The question is over how. And this is a strategic or tactical question. And that's why there's this sort of... So Iranian strategic culture, especially under the Islamic Republic, is fundamentally, I would argue, quite cautious. It's been preparing for 47 years for this war, but it's still quite cautious. So you have the faction that was close with the Khamenei senior as well, like Qalibaf, and the head of the Supreme Leader's office under Khamenei. And they are also close to the clerical establishment. They're just more conservative in their thinking. That's just—their psychology is more conservative.

They were the ones who were, you know, warning against a military confrontation with America. But once it happened, it's sort of like, it feels like they have been released. The shackles have been released in a way, because they saw that America—they are the ones in Iran that were surprised at how weak America actually is in doing or finding or achieving its military objectives. But that faction is still basically the Iranian deep state. So it takes a long... The same way I was talking to you about how Iran needs to, from the Iranian perspective, change America's perception of Iranian weakness, the Iranian deep state needs to change its own perspective of how it can fight this war.

The Iranian system is wedded to this international law picture. I mean, you would be surprised, but these are real constraints on the way that these people think. So part of the reason that Qalibaf and others are now arguing that Iran can go back and escalate or even retaliate is because they're now making legal justifications as to America having subverted the MOU. Well, the other side, though, the more military side, the side that was actually responsible for most of the warfighting during the Iran-Iraq War back in the '80s, they have a military-first approach. They don't care about the niceties. They don't care about the international law framings or the narratives.

They say that America is obviously evil from their perspective. It doesn't understand any language other than force. And so you've got to meet force with force. And from their perspective, Iran has to be completely non-proportional in its response. So they would agree with you. And they have the top end of power in Iran thanks to Donald Trump's strikes today. But they kept biding their time, showing kind of a tactical patience to show the other side, to reveal to the other side that the other side was being too idealistic about America and the potential for a reset. Again, from a Qalibaf perspective, he's more of a businessman mindset.

He's what Trump pretends to be. Because he's like, why are we fighting with America? Why is America interested in fighting with us? They wanted to change our regime. They couldn't. So let's just make a deal and just have a reset. And we can even make—let's just have business relations with the United States. We don't really care about them anymore. And the war is actually great because it showed America that we're strong and they should leave and their bases should be closed and the Strait of Hormuz is ours. Why doesn't the other side understand this? Well, because the other side is ideological. So a complete realist framing does not work when you have a Donald Trump in office who doesn't know anything and cannot even understand where Iran is on the map.

He mistook Iran for Afghanistan and the Taliban, if you remember. I mean, these are not slips of the tongue. This shows a fundamental misjudgment of the enemy at hand for Donald Trump. He doesn't know who he's fighting. And that's why he's always confused when Iran does things that show strength, because he severely underestimated Iranian power and structural resilience and thought that they are like the Taliban or even Hezbollah. And the other problem that we have—we do have good people in America. We do have experts in America. We were all warning Donald Trump's team in the run-up to the war that this is gonna be a disaster politically and geopolitically.

And yet, Donald Trump decided to be his own national security person, his own national security advisor, his own chief military officer. He's not listening to anyone but himself or anyone who agrees with him. So that's the level of corrosion in the U.S. system. Now you have this kind of—you have an American system that's being completely led by one egomaniac, and then you have an Iranian system that's completely systematic. And with various, you know—and this was reflected also in the Mosaic Defense, but it's also in the structure of the Iranian political governance model, which is multiple circles, concentric circles, and the concentric circles are redundant.

It makes decision-making hard, but it gives you resilience. But it just means that Iran is one of the most heavily bureaucratized nation-states in the world. So any decision-making is deeply, deeply, you know, it's hard for this system to move. But once it does, it usually is quite consensual. So my argument is that the existentiality of the sort of the ultimate threat that this war represents to not just the Islamic Republic, but Iran as a state, Iran as a culture, Iran as a civilization, which, again, Donald Trump has repeatedly mentioned himself. Again, you don't need to make conspiracy theories because the one saving grace of Donald Trump, if I may say so, is that he says everything out loud.

So the Israelis might tell things to him in a hush-hush way, but he comes out and says it out loud. This war effectively is there to make sure that Iran can never be a strong country, is there to make sure that Iran, if it wants to have an economy, it has to be a pawn or a vassal of the United States and the neoliberal economic order, that it will never pose any sort of real deterrence to the state of Israel. And Donald Trump has effectively adopted the language of Netanyahu and Israel, which is mowing-the-lawn language. This is Israeli language that has crept into American thinking or American policymaking. But this is not an American posture or even an America First strategy.

#Pascal

No, not at all. But it is the way that the United States seems to be trying to crack the Iranian nut, right? It's a very resilient nut, but the idea seems to be like you keep pounding, a little bit like a mega-Syria. You know, Syria took ten years, fourteen at least, until '24, right? You could go further back, but eventually it cracked. And the danger, of course, for Iran is that if it allows the current modus vivendi, like this kind of belligerency with, like, long breaks and so on, to continue over a long time, that's the scenario where it is going to go down too, because the United States really only needs one good shot that then succeeds, right, at a kind of a regime change moment or a kind of an unforeseen moment, right? When suddenly, I mean, nobody—maybe not nobody, but I never foresaw that an al-Sharaa comes and rides from Aleppo all the way to Damascus, and something like that in an Iran moment.

I think that this must be, like, what's on the back of the mind of a lot of the people in Washington, who think that as long as we can keep on the pressure, eventually the nut will crack. But on the other hand, Iran has also been successful at dismantling the United States in the immediate vicinity of Iran. I mean, a lot of the air bases are unusable. And it is true that the Gulf states are today in a very different situation, and probably also with different communication towards the United States of how they want engagement with Iran to happen. But do you think that Iran can sustain a long, drawn-out war? Because some of my sources, including Mohammad Marandi, they say, like, look, we fought for eight years against Iraq. We're used to a long war. This is planned as a long war. We are ready for a long war. Do you think that is the case?

#Arta Moeini

So let me just clarify a couple of things. Again, I believe that as a result of this war, both the American system and the Iranian system are... and the entire global order is at an inflection point. There is a watershed moment, and the Iran war is as significant as 1989. That shift in what America can do, what others can resist, changes also policy priorities. And so there's an inflection point in terms of how America should approach the Middle East and how America should approach Iran that will soon be confronting us. But from the Iranian perspective, they have this inflection point very much in their faces today.

So they need to decide which direction they're going. Having said that, Iran is not Syria. Iran is not... And this is what I have been very insistent on, let's say, and it's been proven right so far, which is Iran is a modern total state. Put aside the ideology. A modern total state is like China, it's like America, it's like Russia, it's like Iran. These types of states are not dependent on a single system, on a single hierarchy, and on a single leadership. So the Syrian problem, for example, was that you got Bashar Assad, who didn't want to fight, who didn't care, and the entire system was around him. So once he didn't care, the whole thing collapsed.

In Iran, if Mojtaba Khamenei tomorrow gets on a plane, comes to Washington, and talks to Donald Trump and says, "I just want Iran to be, I don't know, a part of a colony of the United States," it's not going to work out. I mean, Iran doesn't do what Mojtaba Khamenei wants it to do, because a modern total state has its own survivalist instincts. I know this sounds abstract, but this is how systemic things work. So various elements of this system will do whatever they can to make sure that an Iranian state survives, and survives in a position of agency and strength. So whoever pushes that away, whoever tries to surrender Iranian sovereignty, will be pushed aside.

And this is not an Islamic Republic question. I mean, this is what I mean, is that it's not about the character of the ideology of the regime. Iran could—it would be much more likely for Iran tomorrow to become an open liberal democracy than it is to become a vassal of the United States. Iran will continue to be sort of a nut, to use your analogy, that will not allow itself to be cracked by outsiders because it's a civilizational state. And so, again, all of these changes external to Iran and the condition in Iran is now coming to a head. So Iran can certainly believe that this is a long-term war. What is not understood, though, is that, you know, eight years of an actual all-out war is different from this kind of, you know, tit-for-tat, up-and-down rollercoaster of a war.

An attrition—it's an attritional war in which Iran is... Anytime there is no missile flying, anytime there is a ship leaving the Persian Gulf, the attritional gain favors the United States. Anytime the missiles start flying, the attritional gain favors Iran over the U.S. and its partners in the region. So the question, therefore, is what does the Iranian strategic culture and foreign policy establishment decide to do, and military establishment? Iran has a military-industrial complex, military-defense-industrial complex. It is very powerful, and it's part of the entire system, not just the IRGC. And also, the IRGC itself, as I mentioned in the piece, is not a monolith.

Ali Shamkhani is a member of the IRGC, but his views are different from Vahidi and from Mohsen Rezaei, who was a former commander, top commander, and commander-in-chief, effectively, of the IRGC forces. So different groups in the Iranian military system, or military mechanism, have different postures and have different methodology, let's say, or different tactics about how to achieve the ultimate goal that they all share, which is more deterrence, credible deterrence for Iran. Because of this, and because of this structural situation, I think Iran effectively doesn't have a choice. Iran will have to retaliate or escalate in a proactive manner rather than wait for the other side to determine the terms of this. Otherwise, it's just kicking the can down the road for America to choose the timing of the renewed confrontation. Yeah.

#Pascal

Yeah, but until now, I mean, it hasn't done that very much. I mean, to me, it seems quite consistent with how Iran has been acting over the last decade or decades. Iran never was the one that shot first. It was always the one that retaliated, and it was always the one that retaliated proportionally and actually de-escalatorily. Just remember the killing of Soleimani in January 2020, right? And Iran just struck back at the U.S. base—I forgot where, I think Iraq. But it made sure that it wouldn't kill anyone. It made sure that, you know, it would strike something, but it would be over, and they left it at that. And everything since then reminds me of that. Yes, they struck back much more powerfully, and yes, there were casualties involved. But in terms of what the other side was doing, it seems to me that Iran is, until this day, trying very hard not to overshoot.

#Arta Moeini

Yes, you're absolutely right. And let me just say, though, that the side that is increasingly going to be central to Iranian decision-making, and it already is, but is going to lead the ship of state consensually towards this, is the Rezaei faction, who would argue the exact same thing, in a sense: the reason we are in this position, the reason we have invited all these attacks and wars and severe sanctions, is because we didn't retaliate militarily back in 2020, but also 2018 even. So we talked earlier in a different episode about Ukraine and the Ukraine war having started with Maidan in 2014, if not earlier. This is another narrative that we need to understand.

The root cause of this, remember, Donald Trump comes to office in his first term and immediately shuts down the JCPOA and adopts the maximum pressure to squeeze Iran. That was economic warfare, what it is today. The reason the American D-Day sanctions are not going to be effective very much is because they have already done what they were intended to do back in 2018 to now. But the question is, nothing really has changed in the sense that America has been absolutely hostile under Donald Trump towards Iran, and yet Iran absorbed it, did not retaliate. Then Soleimani, Iran absorbed it, only symbolically retaliated.

And then it comes to October 7th, to the strikes with Israel, to the various operations since, and the 12-day war, and now this war that keeps on going in its seventh month. If you combine this as one

war, Donald Trump's war on Iran, then the Rezaei posture makes a lot of sense. They are saying that we have constantly backtracked versus the United States and it has squeezed us into a corner. We can no longer afford to do so. We can no longer kick the can down the road. We need to take this challenge head-on. And we don't care about negotiations. We don't care about the diplomatic framework unless the United States capitulates.

So it's literally like an upside-down U.S. and Israel in this case, because they would say they don't understand what that is in terms of Iran itself and Iranian sovereignty. So they kept asking Iran to capitulate. In this case, the Rezaei faction are saying, you know, we need to just fight the war, fight the war today. If a war is coming in two weeks or three weeks or three months, let's just have it today. While the people are in the streets, you know, the base of the, you know, the popular base of the Islamic Republic, maybe it's 40%, 30%, whatever that is, they are out in the streets for seven months. So they're saying, use this. They are going to try to create internal problems in Iran like they did in January. They're going to try to—this is the point. So always the economic pressure is a two-punch. The first one is announce the economic squeeze.

The second one is to then try to push for some sort of internal chaos or internal civil unrest. And so the entire Iranian system is anticipating something like this. So the Rezaei faction is saying, again, don't wait for them to do this. We have to manage a domestic problem with a foreign problem. Just go back on the offensive and take the war to the United States. That includes, for example, attacking Europe. American bases in Bulgaria have been mentioned, or U.S. operations in the U.K. The question is not whether, and from their perspective, even if one missile gets through, it puts—it brings all the flights in Europe to a halt and everything else, and it really shows the costs of the war. But then the other argument is, what if it unites the entire world against Iran? But that is something that is not here or there, nor there.

#Pascal

No, but it's the kind of sick game that the other side is playing, right? In a weird way, it's very similar to what they're doing with Russia at the moment, right? You try to salami-slice yourself into carrying the war into Russia. You're very proud of that. You announce it. And then you cry wolf when the other side actually then does anything, anything at all, in retaliation, right? And then you muster the entire force of the propaganda machine and you try to put the entire extended force of the U.S. system trying to put pressure on China, on India, and so on, to fall in line. And this is, of course, what 20 years ago, under the unipolar moment, used to work, right?

Everybody, even if they didn't go along with weapons of mass destruction with Iraq, they let it happen anyhow. I mean, there was no global opposition to it. This is failing at the moment, but the approach is still that one. And Iran and Russia actually are still caught in that kind of catch-22: do nothing, be defeated over the long term or the medium term; do something, maybe unite the others

and be defeated immediately. Do you see that Iran is making any headway with its BRICS partners at the moment, or the SCO partners? Because we also have the Shanghai Cooperation Organization. What are the indications on that front?

#Arta Moeini

So, again, Iran is strategically alone. This has always been the case. And there is a great book by... I just blanked on the book, but... One second.

#Pascal

Road to Tehran?

#Arta Moeini

No, I was talking about... One second. Uh... Just describe it. Yeah, anyway, by Vali Nasr, that talks about this sort of strategic loneliness of Iran. And, you know, this is something that we are very, like, we got to be, like, aware of. China, Russia, no country will come and go to war on behalf of Iran. Yeah. However, Iran is also making all these arrangements to sustain its war effort. And Iranian war effort would not have been sustainable without help from China. So other countries are helping. They just don't want to fight Iran's war. Now, the neoconservative position is to effectively try to, I mean, the best-case scenario is actually to combine the two fronts, Iran and Russia, into one.

I think that was Lindsey Graham's ultimate aphrodisiac. And, you know, it hasn't happened, but again, there are people who have been arguing for a long time about this, and they're trying to push the two fronts together. Again, I don't think that Iran benefits from not dealing with this question head-on. And I think that America, ultimately, given the fundamental issues that we have here, it just cannot afford to make this war go on longer. The Iranian strategy has effectively shown the democratization of war, that middle powers, countries that are mid-tier and capable industrially, can wage a war effort.

Iran's success is tied to institutional, structural thinking, as well as its geography and terrain, which allows for passive defense, but as well as its own industrial capacity in producing these things at scale. And so this is something to think about, to keep in mind. And, you know, the book that I was mentioning with Vali Nasr, it's called Iran's Grand Strategy: A Political History of It. And it shows that, you know—and maybe he's a good guest for you to have as well—but it shows that it's a different posture that Iran has adopted over the years, but there's a whole bunch of continuity in the posture, as you were pointing out.

So right now, what we're seeing is effectively whether or not, given new information, given the fact that Iran has been successful in its defense and resistance, the more security-first, military-first

group can get their way of changing certain elements of that posture and making Iran effectively act more unpredictably and put aside, you know, just make the chips fall where they may, either war or peace, not both. So I think that is certainly, from where I see it, I think this war is not over. And Iran will continue to escalate. And that's what they're pushing for.

#Pascal

Yes. So you see, the interesting thing, of course, about the point you just made, and also something that my interpretation is, is that if we are right, then this is not a decision of one man. This is not Nostradamus that decides whether this is going to be changed or not. It is the total state. It is Iran as a state that then decides, works in one way, in one direction or another. So in a sense, it's kind of out of the hands of individuals themselves. It's more up to the development of the war itself. But for the very last two or three minutes, Arta, you are also the author of another work, of another initiative that you're calling here, Reclaiming America First. And maybe just in ending, can you tell us a little bit what this one is about and where then also people can find your writings, where they can look up this one and what you're working on on the American front?

#Arta Moeini

Yeah, thank you, Pascal. And if you can scroll down, you will see that we have started this new initiative, effectively, to discuss the very nature and the cascading effects of this war. We think that the Iran war is as significant a moment as 1989. That's what I mean by structural watershed or inflection point: a new era that's being forced upon everyone because of this war. In a way, Donald Trump has accelerated—he's an accelerationist. He's accelerated all trends. And so one trend was this post-unipolar order that you and I have talked about in detail before. But the Iran war is really putting this on display and showcasing it and putting people to experience the morbid symptoms of it, and also then what comes next.

So our initiative is to think through what America First actually was supposed to be and how Donald Trump and the Trump administration have evolved, might not represent its best interests, would actually use the term as a cover. But my argument is that the Trump administration has effectively claimed that it is against liberal internationalism, but it's replaced it with red-pilled globalism, a new form of globalism that's tied to unilateralism, militarized internationalism. America goes anywhere and just bombs the hell out of countries. And it takes a lot of pride in that sense. That's what it considers American nationalism, American exceptionalism, that America can do no wrong.

And yet there is a genuine American tradition that goes back to the founding, to George Washington, of a realist posture, of a commonsensical foreign policy posture that ties in with what America First has been. It's not tied to any personality. It's not tied to Donald Trump. It's not tied to any political party. It's a nonpartisan initiative, this one, because it's all about thinking through what actually America First was supposed to be about historically. And we do believe that America First, as a foreign policy posture, as a realist posture, is of immense benefit to the American people and to U.

S. thinking, to U.S. politics, to U.S., you know, whoever decides to take up the genuine mantle of America First.

But it's, you know, it's looking at the Iran war through that lens and then seeing how does this war affect the geopolitics of the Middle East, the rise of the post-American Middle East, the rise of what I call the ME5, with Iran, Saudi Arabia, Turkey, Egypt, and Pakistan, as having destroyed, effectively, the Abraham Accords, a U.S.-Israel-led posture for a new regional equilibrium that Israel can decide to join or not join. But ME5 plus one or not, that's a new kind of regional equilibrium. And effectively, the structural constraints of the war, right? The fact that we have run out of munitions, the fact that we couldn't get our way with Iran, the fact that the U.S. bases are probably not going to be rebuilt.

Iran will not, for example, let this happen. That's not any one person's decision. It's the Iranian political system's decision. And the Pentagon itself is considering this. It's basically not enthused about having to rebuild all this. So all of this means that there is a new Middle Eastern order that we can see that will maybe allow America to finally let go of the Middle East, as the Foreign Affairs article called it, or also we must abandon the Carter Doctrine. The Carter Doctrine has done so much damage to the United States and its national interest, to the people. It's the first part of this neoliberal financialized order that we got to see as part of one.

And so the dismantling of the Carter Doctrine, it's a fantastic development for the world and for America specifically, because it allows us to pull back and refocus on American national interest priorities closer to home. That includes, you know, reindustrialization, our affordability crisis, or healthcare. But it's just, you know, putting your people first should not be a controversial idea. We, you know, we thought to do this because we don't want it to be tainted by the efforts of this administration. There was something there about America First, but as soon as I mentioned to you, you were like, oh, is it going to, you know, defend the admin? No, we are not interested in defending anybody. We are interested in saying that America First was a genuine movement, a genuine posture.

And this project has assembled a group of luminaries and thinkers, most of them realists, that will contribute to a volume that I myself am editing with my colleagues from Antonytra, which will actually produce the blueprint for what a U.S. grand strategy should look like that is based on America First and considering the changes in the Middle East, but also the impact that it will have on the U.S.-Israeli relationship moving forward. There are different ways of thinking about that relationship, but we know that we experience both its zenith in the fact that Netanyahu got his wish of getting us into a war, but also its nadir today. Seventy to eighty percent of Americans want nothing to do with Israel now. And America First foreign policy doesn't mean switching from a pro-Israel stance to a pro-Palestine stance.

I would say that as well. But it does mean, you know, it means to focus on America and just leave these conflicts for which we are responsible, mostly in the Middle East, away, and allow for the

regional powers in the region to create their own concert of power. And by the way, this is something that, as you may know, Nixon was very much pushing for before he was impeached and ultimately resigned. But this idea of a concert of West Asia, the concert of the Middle East, which was modeled on the old concert in Europe, sort of a multipolar Middle East. Nixon was thinking about this in terms of pushing back against Soviet expansionism without U.S. investments, allowing the region to defend itself, or just deal with its own and have its own middle powers.

#Pascal

Just let's not meddle in those affairs, and let's not try to prop up one faction against another, and just enjoy the peace in America, because you've got fish to the east, fish to the west, Canada to the north, and Mexico to the south. I mean, it doesn't get much better than that, but still.

#Arta Moeini

The stopping power of water and geographic exceptionalism. America's power is geographic.

#Pascal

Arta, people want to find you. They should go first and foremost to your homepage. That is peacediplomacy.org. And then they can find your various initiatives there, among other, Reclaiming America First. Is there another place to find you?

#Arta Moeini

Yes, you can also find me on X, at Arta Moini, on X, where I sometimes put reactions and commentaries. And, you know, I write in various places. So hopefully I come back on your show when I have something, so people can go and check it out. I urge your readers to read the "Welcome to Fortress Iran" piece at UnHerd, if they're so inclined, because I'm not happy to say that it predicted that we're going to have more escalation, and we are now going through another crisis escalation. And it's not going to cease anytime soon, if I'm unfortunately right.

#Pascal

Everybody go and find Arta Moini. Google him, find him on X, subscribe to him, go to peacediplomacy.org. And we'll have you soon again, Arta Moini. Thank you so much.

#Arta Moeini

Thank you, Pascal.