Chas Freeman: Diplomacy Fails - Strait of Hormuz Shut Down Again

Ambassador Chas Freeman discusses the failure of diplomacy as the Strait of Hormuz shot down again. Ambassador Freeman was a former Assistant Secretary of Defense, earning the highest public service awards of the Department of Defense for his roles in designing a NATO-centred post-Cold War European security system and in reestablishing defence and military relations with China. He served as U. S. Ambassador to Saudi Arabia (during operations Desert Shield and Desert Storm). Books by Prof. Glenn Diesen: https://www.amazon.com/stores/author/B09FPQ4MDL Follow Prof. Glenn Diesen: Substack: https://glenndiesen.substack.com/ X/Twitter: https://x.com/Glenn_Diesen Patreon: https://www.patreon.com/glenndiesen Support the research by Prof. Glenn Diesen: PayPal: https://www.paypal.com/paypalme/glenndiesen Buy me a Coffee: buymeacoffee.com/gdieseng Go Fund Me: https://gofund.me/09ea012f

#Glenn

Welcome back. Today is April 18th, 2026, and we're joined by Chas Freeman, the former U.S. Assistant Secretary of Defense. Thank you for coming back — it's always good to see you, my friend.

#Chas Freeman

Good to see you, Glenn. Good to be here.

#Glenn

You have a lot of diplomatic and political experience from what seems to be all the major flashpoints in the world. You were with Kissinger in China as an interpreter in the 1970s, you served as the U.S. ambassador to Saudi Arabia, and you played a key role in shaping the post–Cold War security architecture in Europe. So I was hoping to get your perspective on the times we're living in, because right now it feels like we don't have much diplomacy left. We're fighting Russia, we're fighting China, we're fighting Iran—and in every case, the assumption seems to be that we have to defeat our opponents. Our political class no longer talks about peace. If there's any talk of diplomacy, it usually comes from the military, not the diplomats. It seems we're only pursuing "peace through strength," which are really fighting words. So if we take a step back, how do you assess the unraveling of all these regions at the same time?

#Chas Freeman

I think in West Asia, which is the topic of the day, of course, the unraveling has been going on for quite some time. But there's a great deal of confusion now about the state of play. Essentially, perhaps the United States doesn't understand diplomacy anymore—there's no evidence that we do. We certainly don't send experienced diplomats to handle important matters. We send cronies, or the president's son-in-law, to no avail—the vice president, to no avail. But the Iranians clearly understand diplomacy. They just gave Donald Trump an opportunity to declare victory and leave by opening the Strait of Hormuz—under their control, of course—but opening it in a way that could have set the stage for a meeting, perhaps a conference, to discuss the long-term management of the Strait of Hormuz.

And it's clear that Iranian equities there have to be taken into account. They can't be ignored, much as we might prefer the previous regime established by the UN Convention on the Law of the Sea. That's increasingly being ignored—certainly by the United States, and now by Iran. So when the response to the opening of the Strait under these controlled conditions was not an exit strategy but a doubling down on the American blockade of the Strait, Iran retracted its opening. And now we're back to an essential closure. There are several strange things about this. First, if you think of the Strait as a sort of door—Iran left the door slightly open, peeking around it. If it saw a friend coming, it would open the door in return for a payment.

If it saw someone who wasn't a friend coming, it would shut the door. So the response to this by Donald Trump was essentially completely irrational. It was to close the door and lock it—add lock it. That maximizes the pressure on every economy in the world. It basically will tip the global economy into recession. It ensures higher gasoline prices for American consumers, which is the primary concern of the president as he faces the midterm elections. And he's characteristically dealt with this whole issue with public bombast and statements that appear to be totally disconnected from reality. For example, he now claims that Iran has agreed to everything. Well, if Iran has agreed to anything, why are we doing what we're doing?

Why aren't we talking? Iran says it hasn't agreed to anything. So the credibility of Iran in this regard is, I'm sorry to say, as an American, much greater than that of the United States. What will happen now, we don't know, but one possible explanation for the continuation of the blockade is that the Trump administration planned to go out with some kind of military bang this weekend. Many people have reported that there were plans to do that, and Iran upset those plans by basically offering an opening of the Strait. So where do we go from here? Sooner or later, there has to be some kind of negotiation. It will not be—well, I guess I should say that one thing has been apparently at least partially resolved, and that is the dispute over whether Lebanon is part of the make-believe ceasefire that was announced a while ago.

The answer is yes, it is. And Donald Trump has now prohibited Israel from conducting further aggressive operations there. That isn't stopping the Israelis, by the way, from violating the new so-called ceasefire in Lebanon. But it does answer the Iranian condition that there be a discussion

and arrangement for a region-wide peace, not just one between the United States and Iran or Israel and Iran. What will happen? I don’t know. My sense is that both sides are playing for time. My sense is that Iran is more likely to win in that contest than the United States. It has a great amount of oil afloat beyond the Strait of Hormuz, which it can sell. It won’t be deprived of revenue anytime soon.

Incidentally, the oil market has changed. India just paid for Iranian oil in Chinese yuan. So we're looking at the unraveling of the petrodollar arrangement as a consequence of this. But the main thing is that a substantial part of the United States Navy is now in the Arabian Sea or the Gulf of Oman, conducting a blockade. We're hearing reports that conditions aboard the ships are deteriorating rapidly—that the crews do not have access to basic necessities, that food is running out, that systems are breaking down. And this is not a formula for the long-term sustainment of a blockade. So I think, at the moment, it looks as though Iran is better placed than the United States in this war of attrition. I'll stop there.

#Glenn

In terms of the Gulf states, how likely—or how would you see their likely strategy—moving forward? Do they have much faith in the blockade, or will they take a more active role? How do you see the likelihood of Saudi Arabia, for example, joining the fight?

#Chas Freeman

Well, the Saudis have been quite clear that they do not approve of the blockade. They've asked that it be ended. They are in touch with Tehran. The foreign ministers of Saudi Arabia and Iran have conferred at least once recently. Saudi Arabia is actually in the best position of any country in the Gulf Cooperation Council. Kuwait and Qatar are basically isolated in the Persian Gulf. The Emirates is caught between the American and Iranian blockades. Oman is basically exempt from both, but it's not a major player. Saudi Arabia is now the main conduit for the exports and imports of both Kuwait and Qatar because it has access to the Red Sea. The Iranians, of course, have declared that if necessary, they will call on Ansar Allah—the Houthis—to once again close the Bab al-Mandab and blockade the Red Sea. So the Saudis are under considerable pressure, as are their neighbors.

But so far, Saudi Arabia is still exporting about six or seven million barrels of oil a day through the port of Yanbu. Iran had struck a pumping station on the east–west pipeline in Saudi Arabia, but that seems to have been repaired. I take that as a warning shot that, if necessary, Iran can shut down Saudi exports as well. Meanwhile, even if the strait were, in fact, opened and ships were sailing through without difficulty, the global oil market is in for a major shock, because it takes three weeks to a month for these ships to arrive at their destinations. Around the world, there is a desperate search for alternative sources of energy. This is working out very well for Russia, which is once again exempted from sanctions and therefore able to increase its oil exports. It may be a boon to American control of Venezuela as well.

But we have yet to see any significant increase in Venezuelan production and exports. So Donald Trump, by opting to padlock the door to the Persian Gulf, is taking a huge risk—both domestically, in terms of his politics, and internationally. And I would note that, as I said, if he were pursuing purely American interests—if it really was "America First" in West Asia—he would have accepted the opening of the Strait and used that as an excuse to start something like the fictitious peace process that existed between the Israelis and Palestinians only in the minds of Westerners. I mean, there were no effective negotiations there, but the peace process became an excuse for not resorting to violence. And the same thing could happen in the Persian Gulf with the Strait of Hormuz.

When and if there is a serious meeting about that issue, I think there's going to have to be some kind of international regime agreed with Iran. Something like the Dardanelles Treaty, I guess—one that recognizes an Iranian role in managing the Strait but also establishes agreed rules of engagement and a regulatory mechanism to prevent the kind of abuse of Iranian power we've seen now. In any event, the bottom line is that, of the many shifting objectives the United States and Israel have put forward, none have been achieved. Iran has been pushed into a nuclear weapons program, I believe, rather than having it removed. It hasn't had regime change; it's had regime consolidation. Its missiles are not exhausted.

It has an ample supply with which to restart the bombardment of Israel and its neighbors if it's required to do so. The Strait of Hormuz, which was open, is now closed and under Iranian control. Israel has failed to secure southern Lebanon—interestingly, with the opposition of Donald Trump being the key factor there. And that's the last gamble Donald Trump has taken. He's now caught between his Zionist donors in the United States, who want the war to continue and support Netanyahu's desire for it to go on, and his Israeli blackmailers under the Epstein files. How long can he sustain defiance of Netanyahu and the Israeli government? We shall see. That's another factor in terms of clocks ticking—not to the advantage of the United States.

#Glenn

How about the way diplomacy is done now? Is this how it used to be? Because I'm thinking, when they announced the ceasefire, I know it's not always about documents being released—the conditions of a ceasefire and all that—but first we were told it would be based on Iran's 10-point plan. Then we never heard anything about that plan again. There were disputes about whether Lebanon was included in the ceasefire, even though the Pakistani prime minister insisted it was. And even after that, you'd assume there would be some clarity about whether the U.S. imposing a blockade on Iran would be considered a breach of the ceasefire, given that it's an act of war.

But even after all this, we see now that the whole negotiation—Trump takes it to social media and sends out his messages: the blockade is open, it will not be put back in place, and the Iranians will give up all their nuclear material. And soon thereafter, you know, the Iranians—also now communicating on social media—say, well, none of this is actually true. And now, because the U.S. didn't lift its blockade, Iran reimposes the blocking of the Strait of Hormuz. It's just… it's very

confusing, the whole thing. It's like—wouldn't it be usual to have some common document, something that can be put out there? Because at this moment, it's like teenagers quarreling on Twitter. It really doesn't make much sense.

#Chas Freeman

This is yet another example of fantasy foreign policy—that is, foreign policy by media manipulation rather than a serious effort to reach an understanding with the other side. We've seen this pattern again and again. We've seen it in Ukraine with the talks in Moscow, in Gaza with the phony ceasefire there, now in Lebanon, and with Iran. No, it is not usual. It is not usual to declare an agreement when there is none. There's been no meeting of the minds in any of these instances, and this just underscores the amateur hour that American diplomacy has entered. Our envoys are totally inexperienced, not knowledgeable about the regions they're dealing with, novices in their understanding of history, geography, and so forth, and not up to the technical specifications.

So what we saw in Islamabad, in the meeting between J.D. Vance and Mr. Alibaf and Araghchi, the foreign minister of Iran, was not a negotiation. It was an American performative act intended to imply that there was a negotiation which didn't exist. The Iranian side arrived with seventy-some people in their delegation, with the full authority, apparently, of the leadership in Tehran, including the IRGC—the Islamic Revolutionary Guard Corps—to conduct a serious negotiation and reach an agreement. They had technical staff with them who were prepared to discuss issues in detail. The American side was heavy on politically connected people and very light on experts, and it was essentially there to present an ultimatum.

But it was an ultimatum that had no real leverage behind it. The American delegation had to bow to the preposterous claims of Donald Trump—the sole, now-functioning authority in the United States on these matters—that somehow the United States had won the war, confusing death and destruction of the Hegsethian variety with victory in the Clausewitzian or Sun Tzu sense. Namely, the purpose of war is to achieve adjustments in relations and policies. That is a political result, not simply to cut up the enemy and inflict suffering on them. So Iran has shown that it can take an enormous amount of punishment and continue to fight.

His whole strategy, as I've mentioned before, was the same as Muhammad Ali's rope-a-dope strategy—that is, allow the enemy to punch you as hard as it can in order to exhaust and weaken it, and then wait for the moment to deliver your own countermeasures and counterblow. So that's where we are. Iran has not changed in that regard. It doesn't want more punishment, but it can take it. It's not clear that Israel and the United States have the capacity to do the same. The ability of both to intercept missiles has been greatly depleted. Iran has successfully captured major American capital ships—aircraft carriers—at a distance of five or six hundred miles, a thousand kilometers or so, because if they come any closer to Iran, they're subject to attack, and they're avoiding it.

As I indicated, the situation aboard the ships conducting the blockade is apparently deteriorating fairly rapidly. Iran, on the other hand, is now digging out its stores of missiles from tunnels that were blocked by American and Israeli bombing. It's preparing to enable those to be fired. So I think this is a war of attrition, and we're very poorly suited to such a war. We don't have the industrial base to immediately replenish what we've expended. Iran may have such an industrial base underground—there's every indication that it does. So here we have a strange situation in which the most powerful military in the world and its cadet in Israel are unable to overcome what is basically an isolated and not very strong Iranian military.

#Glenn

But you also have a fairly strong background in China, and I was wondering how you read the Chinese response there, because they're quite quiet and cautious, as they always are. Either this could reflect a more peaceful nature, or they might simply see that time is on their side—that is, they don't want to cause too much disruption in the international system.

But it seems like a lot of the things being done now target the Chinese—that is, kind of blockading Iranian oil going to China, or these threats of sanctioning Chinese banks for trading with Iran because the Iranians are allegedly terrorists. Even people like Glenn Diesen are going out, you know, warning the Chinese they're not going to get any more Iranian oil. This is, you know, the U.S. Navy stopping Chinese ships—civilian vessels—from picking up oil. This is a clear escalation, and I was just curious: how do you see the Chinese position? I mean, does this reflect weakness? Will they have to yield to U.S. demands, or do you think they're going to be pressured to take a harder stance? Sorry, it's always a very big question.

#Chas Freeman

Quite a few questions, yes. Well, the Chinese have many interests at stake here. The major one you referred to is that they've emerged as the defender of the UN Charter, international law, and the international system, whereas the United States is the despoiler of that system. The Chinese have a big stake in maintaining the system that brought them to wealth and power. That's the system pioneered and sponsored by the United States—the Pax Americana—but now without the United States. The Chinese want to root this in a global, multipolar system. Anyway, that's one thing.

The second thing is, of course, the Chinese do have a stake in maintaining their access to the Persian Gulf. In that regard, they're no different from any other country on the planet. Essentially, what the United States has done is declare economic war on every country on the planet. So why wouldn't the Chinese sit back and enjoy watching the United States isolate itself and make enemies where it formerly had friends? So that's the second thing. There's a lot of very silly armchair strategic reasoning going on in the United States—that somehow China's existence is at stake, or that what we're doing in the Middle East is a fatal blow to China, or, you know, a strategic setback.

But that’s not true on several grounds. First, the Chinese are actually well positioned because of their leadership in renewable energy, their coal deposits, and their very large strategic petroleum reserve, which allows them to ride out any crisis quite well. It is costing China some relationships in the region, because the world—and Southeast Asia in particular—has become dependent on Chinese exports of diesel and jet fuel. Those have now been suspended on the principle that charity begins at home, I guess. But China will be hurt, of course, though it can manage the level of pain it will suffer.

The second element here is that China is being pushed closer to Russia. The Power of Siberia gas pipeline, discussed for many years but not pursued, is now actually moving forward. The Chinese and the Russians are conferring frequently on strategic matters and acting in concert at the UN and elsewhere. So there are other factors here. China’s close relationship—not an alliance, but a protected-state relationship—with Pakistan has been activated. Pakistan has emerged as the essential mediator, at least passing messages between Tehran and Washington and vice versa. To call this a negotiation is, I think, stretching things.

It's message passing, but it's very important. And as I've mentioned before, Pakistan also convened the Egyptians, Turks, and Saudis in a meeting that empowered it to go to Beijing to get Chinese backing for an effort at conciliation in the Gulf, but also to plan the development of a military-industrial complex in the region that would be independent of Western—specifically American—dependence. So, um, lots of things going on. None of them really hurt Chinese influence. In fact, on the contrary, China is emerging, uh, globally, in image terms, as I said, as the defender of, um, the international order, uh, as the United States destroys it. Um, China is regarded clearly by the countries in the region as a, uh, a valuable interlocutor.

Um, diplomatically, it has a major interest in opening the Strait of Hormuz and will play a role in arranging whatever is eventually done to regulate that strait. And I'll just end by making an obvious point: it will not have escaped the Chinese understanding that what Iran has done in the Strait of Hormuz, they could do in the Strait of Taiwan. So, you know, this cuts both ways. They may have less interest in depriving Iran of its sovereignty in the strait than any other country does because of that complication. We have Donald Trump apparently going to Beijing. It’s not clear what he claims will be a great moment in history—but then every moment is a great moment in history for him, apparently. And we’ll see what happens. My sense is that the U.S.–China relationship is in pursuit of minimal stability and nothing else.

That is to say, each side wants to avoid making unnecessary trouble for the other or provoking the other into doing something that could be potentially disastrous. And that brings me back to the question of Chinese shipping to the Gulf and going through the Strait of Hormuz. It's not clear to me what the rules of engagement for the American blockaders are, or with regard to the shipping of nuclear-armed superpowers. I hope we never find out how far they are prepared to go. Now, the

last thing—the response of the Chinese to the assaults on Iranian sovereignty, territorial integrity, and diplomacy—is apparently evoking a direct Chinese reaction. We're told that China will supply greater air defense capabilities to Iran. That would be logical.

It's China's right to do that as a non-belligerent and neutral country, very much resembling Lend-Lease and other things the United States did in the years approaching World War II, when we declared neutrality but nonetheless took a side in defense of Great Britain and other countries in Europe against the Nazis. So I think the Chinese have a stake in the survival of Iran, but it's a complicated one because of the legal issues connected with control of straits. And the Chinese are, for the most part, in observance of the UN Convention on the Law of the Sea. They have one aberrant aspect of behavior, which is that they apply straight baselines where they are not permitted by the treaty. That's a technical issue which probably nobody listening to this wants to learn about, so I won't explain it.

#Glenn

Fair enough. But a key interest of China in Iran isn't just the wider geopolitics of the United States, the oil supplies and all that. A key project for Iran has also been the development of the Belt and Road Initiative—this vast, trillion-dollar infrastructure project connecting the Eurasian continent. One of them, at least. They have other projects, of course, but Iran seems to be a key node in this. I also noticed that the U.S. and Israelis have attacked a lot of railroads and ports. Some of this seems to fit within, or affect, Russia's, Iran's, and India's international north-south transportation corridors, but others are also connected to China's Belt and Road Initiative. Again, Iran is an important node. Do you think this is deliberate—to undermine this larger project of integrating the Eurasian powers—or is it just because infrastructure is used to keep the economy going and move militaries? How do you see this?

#Chas Freeman

I think it's both—a strike at the Belt and Road Initiative and an effort to destroy the foundations of Iran's economy. I note that among the strikes was one on a port in the Caspian, which is a central element of the East-West Belt and Road Initiative. It's interesting: the Chinese have clearly responded to the increased danger of maritime traffic by doubling down on their focus in Central Asia. It's not just the Power of Siberia pipeline that's being emphasized, but other routes as well. By the way, there's a pipeline that extends from Turkmenistan, a major producer of gas, to China. That pipeline can be supplied with swapped gas from Iran, so Iran already has one outlet to its north for energy exports. It's not completely bottled up in the Persian Gulf.

So I think geopolitically, the influence of this war is quite obvious. First of all, every country now is more interested in electrifying its economy and getting away from dependence on imported oil and gas. That's happening even in the United States, despite our undying love for the internal combustion engine. So we've created a huge market for Chinese technology—solar, wind, nuclear,

hydro—and for electric vehicles, in which China leads the world. And this is one big effect. Nobody is going to trust freedom of navigation again after seeing the world's most powerful navy violate that principle. You know, Iran has a point about the United States conducting a blockade against the Strait of Hormuz. This is clearly a violation of a ceasefire agreement. It is, as you said, an act of war—and it is illegal, therefore.

So the United States finds itself in the odd position of confronting a China that stands for what we used to stand for—namely, the rule of law. Not terribly convincingly, perhaps, because China lacks the rule of law internally. And that raises a real question: can a country that does not respect the rule of law domestically be trusted to respect it internationally? There's clearly a relationship between the two domains. You know, the fact that the United States is violating international law has something to do with why unconstitutional and illegal practices are growing in our domestic context. So this is all very interesting. And one other point—we're seeing the beginning of ad hoc conferences as a way of dealing with issues that the United Nations is clearly incapable of handling.

So we have a group of, what, forty countries meeting under French and British auspices to discuss what to do about the Strait of Hormuz. They can't come up with a military solution because, first of all, there isn't one. Second, they no longer have the capacity to project power effectively. Therefore, they're going to have to come up with a diplomatic strategy—if they're capable of it. I mean, so far they've been incapable of doing that. On other issues too—the Ukraine war, for example, European security architecture, Gaza, the Israeli genocide, the security of the state of Lebanon. And, of course, I should also comment on the discussions between the Lebanese and Israeli governments in Washington and what they do and do not mean. But I'll leave that for later, if you're interested.

#Glenn

Yeah, no, I was actually next in line with my questions. But I did—yeah, this is what I thought when you talked about the rule of law domestically and internationally. Often values don't necessarily have to transition from the domestic to the international. The American academic John Herz—he wrote, I think it was in 1950 or maybe '52—said that the more democratic countries are internally, the more they often resist democracy internationally. That's because they perceive themselves as having better values, so they want to protect those values from the rule of the majority. Right. It sounds strange, but it does make sense at some level, I guess.

#Chas Freeman

It's a resonance between the two domains. You're quite right. And the United States, of course, has been fiercely defensive about our own sovereignty, even as we tread on others' sovereignty. We don't belong to major international institutions like the International Criminal Court and so forth. And we are serial violators of the principles we ourselves propose for the international order. Why?

Because we don't want foreigners telling us what to do. Well, we tell foreigners what to do, I guess. Foreigners increasingly pay no attention, and that is emphatically the case with Mr. Netanyahu and the Israeli government. We'll see what happens there.

#Glenn

I just had a talk with Ambassador Jack Matlock, and he was making the point that the reason the U. S. was so fiercely opposed to the Soviets wasn't because they were communists—they could choose that for themselves—but because they were trying to impose it on everyone else. He said that today we're the ones who are ideological, the ones imposing our way of government on other countries and pursuing this idea of limited sovereignty. So it's interesting that the ideology of a hegemon can come with these kinds of principles that promote, I guess, sovereign inequality among states. I did want to get to the Lebanon issue, though, because you mentioned that Israel seemed to have a goal. I interpret it essentially as putting a massive occupation on southern Lebanon, based on the villages they're destroying and more or less openly saying so. How do you see this strategy playing out now that the ceasefire in Lebanon is tied to the ceasefire with Iran?

#Chas Freeman

Well, obviously, the Israeli government is very frustrated, particularly by the intervention of Donald Trump and by the way he announced that intervention—unilaterally on social media, without consulting the Israelis. One has to assume there was some private communication to Israel backing this up and threatening to cut off weapons for the invasion, but that's a matter of conjecture. Anyway, before I get to Lebanon, let me make a comment about messianic foreign policy. I think Chapman is correct, but it's equally true that during the Cold War we had a messianic approach, at least rhetorically.

We tried to export both democracy and capitalism to areas of the world that had been liberated from colonialism. And there was quite a contest between us and the Soviets. We had the better model, as it turned out. Francis Fukuyama rather overstated things when he claimed that history had ended. But there was a break—there was a turning point when the Soviet system collapsed under its own defects. I would argue that the United States has consistently, from our very birth, been messianic in trying to export our values. We began with a revolution and continued over the succeeding centuries to insist that others do things our way because it was superior.

I won't get into the history of missionary activity in places like China, but this is very much part of the American character. I think one of the great moments in our diplomatic history was the Shanghai Communiqué, issued by Zhou Enlai and Richard Nixon on February 28, 1972. In it, we declared that the United States and China had fundamentally different values, different socioeconomic systems, and ideologies, but that this should not impede our cooperation on matters of common interest. That

is a proper diplomatic approach, and I only wish it were being applied today. With regard to Lebanon, first of all, this is a discussion between an essentially illegitimate Lebanese government and Israel.

I say "essentially illegitimate" because that government is set up along the confessional lines the French imposed on Lebanon during the colonial era. The president is always a Maronite Christian, the speaker of parliament is always Shia, and so on. But the demographics in Lebanon have changed fundamentally. Now Shiites are a majority, and the major force in Lebanese politics and in parliament is Hezbollah. It's not just an army; it's a political movement, a political party with enormous authority. And in many ways, it's fascist. I'm not very fond of it.

I mean, it's a state within a state and performs a lot of functions for those under its authority that the government can't perform. But one of those functions is the defense of Lebanon as a state against Israeli aggression, which the Lebanese army is incapable of doing. So here we have talks between—well, Hezbollah, of course, is not part of these talks. It has repudiated them, claiming they're illegitimate and that it won't be bound by them. It will take advantage of anything that comes out of them, of course, if it can. But essentially, we have a Lebanese government that's threatened by Hezbollah domestically. It used to deal with this issue by cleaving to Iran, as part of an Iranian–Hezbollah sphere of influence. Now it's trying to replace Iran with Israel—basically, to enlist Israel against Hezbollah.

And Israel's purposes are very clear: they want to destroy Hezbollah and disarm it. By doing so, they would remove any obstacle to their military operations in Lebanon. It's also very clear that in southern Lebanon they've blown up all the bridges over the Litani River and other rivers, severing the Lebanese south from the rest of the country. They're applying the model of Gaza to that region—that is, destroying physical infrastructure, murdering anyone they can strike, and driving people out. Unlike Gaza, people in Lebanon have somewhere to go. You know, we've had some very—well, I should say—frightening, objectionable statements from people like Jared Kushner about "why don't we just bulldoze part of the Negev Desert and move all the Gazans there." But the fact is, the Gazans have stayed put. The Lebanese have not.

They've moved out, and now they're coming back. Israel has actually established a parallel to the so-called yellow line in Gaza—an invisible border—and it shoots people who cross that border, declaring them terrorists. Because otherwise, why would they be crossing? I mean, they must have something nefarious in mind. Maybe they're just trying to get home. Anyway, what we're seeing in southern Lebanon is a repeat of Gaza, and that should be pretty sobering, because it suggests Gaza was not an aberration. It's a pattern Israel intends to impose on other areas it chooses to annex. And, of course, it's a unique kind of state—it has no borders, no agreed frontiers whatsoever, constantly expanding. It falls short of the normal definition of a state. So…

#Chas Freeman

Lebanon is a great caution in many ways, but what's going to happen there—my guess is we'll see a repetition of Gaza. That is to say, a phony ceasefire will cause Israel to insist that everyone else stop firing while it continues to fire at them and pursue its strategic objectives. And this is probably going to lead to some kind of blow-up between the Trump administration and Israel, or, more likely, the capitulation of Donald Trump to his Israeli minders. So that's what I see happening. I do go back to the point, however, that the proclamation of a ceasefire—and its apparent backing with some sort of threat to Israel—does represent a victory for Iran, in terms of insisting that there be a comprehensive, region-wide peace, not just a ceasefire or a truce between it and the countries that attacked it.

#Glenn

Yeah, I saw the message from Trump insisting that—well, he told them there would have to be a ceasefire in Lebanon and Israel, something along those lines, like, "You'd better follow what I told you." I'm not sure if that's meant to shake off some of the narrative that the Israelis are controlling him, to assert some autonomy or power, or if it's an actual threat. Maybe it's a bit of both.

#Chas Freeman

It's an indication, Glenn, of his desperation to get out of the mess he's made in a war with Iran, where he basically enlisted to implement Israeli objectives. There have never been any clear American objectives in this war. It's been all over the place. So he wants out. And as I pointed out before, his training in New York real estate had two elements. One was that you made deals through coercion and bullying—you threatened to bankrupt or ruin your proposed partner in a deal, and that's how you got a deal. That was Roy Cohn's lesson to Donald Trump: you never accept defeat, you always punch back, you don't have any regard for the facts, you make up facts, because the court of public opinion is more important—in the real estate context, perhaps in New York—than the underlying reality.

Unfortunately for Donald Trump, that doesn't work internationally. Reality persists even if you misdescribe it or ignore it. The second element in his training is that when you get in trouble, you declare bankruptcy and walk away with no obligations. And that's what he'd like to do with the Persian Gulf. That's why I'm so surprised he didn't have the wit to accept the Iranian opening of the Strait as a victory. It would have been a perfect excuse for him to say, "I intimidated them, I imposed my will on them, they had to open the Strait, this is a major achievement—give me the Nobel Peace Prize, ask some Norwegian to invite me to Oslo," and so on and so forth. So he didn't do that, which suggests that his Israeli minders were still guiding the policy.

#Glenn

So, likely back to war then. Now, what is a ceasefire? Well, it probably won't lead to an actual peace agreement, I guess, but, uh…

#Chas Freeman

And not likely, but you know, one of the amazing things about the rollercoaster we've been on in this war is the gullibility of so many people. I mean, look at Trump's ability to manipulate the market—quite extraordinary. And people's wishful thinking that the best is about to occur because Donald Trump proclaimed it would is really remarkable. I've never seen anything quite like it. And I'm a minor investor. Having emerged from my government service penniless, I've been trying to rectify that condition with some success. So I follow the market, and it is very much manipulated by this charismatic, slightly insane—maybe more than slightly insane—man in the White House.

#Glenn

I still can’t believe I was able to talk oil prices down by $15 just by claiming that, more or less, the Iranians had capitulated on the Strait of Hormuz.

#Chas Freeman

It's quite extraordinary.

#Glenn

After all these years, people still believe his words. I mean, the Iranians even had to come out and argue that reality isn’t shaped by social media posts—it’s on the ground. You know, what Trump says isn’t real. They kind of dismiss it, and yet the market still seems, uh, yeah, overly optimistic, if not gullible. Um, anyway, any final thoughts before we wrap up?

#Chas Freeman

No, I've said enough to hang myself, I think. I wish you all the best and urge you to keep up the good work of providing access to people who—myself excluded—know what they're talking about.

#Glenn

Well, thank you again for taking the time out of your Saturday.

#Glenn

So, cheers.