

The 4 Endgames of the Iran War | Chas Freeman

Former US diplomat and geopolitical analyst Chas Freeman joins us to discuss the US-Iran negotiations, the future of the Middle East, and whether this moment marks a historic turning point for American power in the region. We discuss: * What is really happening between Iran and the United States * Whether the Trump administration genuinely wants to end the war * Why Israel and the US may have different strategic objectives * The changing position of Gulf states toward Iran * Iran's growing regional influence * The decline of US financial and geopolitical hegemony * The future of Iran's nuclear program * What happens to Palestine amid regional war and negotiations

Chas Freeman also outlines four possible end points to the conflict and explains how the war could reshape the balance of power across West Asia. #Iran #USIran #ChasFreeman #MiddleEast #Israel #Trump #Geopolitics #Palestine #IranWar #USPolitics #WestAsia #SaudiArabia #Nuclear #China #Russia

#Mudiar

Hello and welcome to another episode of India and Global Left. If you are new to the show, please hit that subscribe button. Also, consider becoming a YouTube member, a patron, or donating a small amount using the link in the description box. Without further ado, let me welcome our guest tonight, Ambassador Chas Freeman. Ambassador Freeman is an American retired diplomat and writer. Ambassador Freeman, welcome back to India and Global Left.

#Chas

Thank you, Jyotishman. Glad to be with you.

#Mudiar

Ambassador Freeman, how would you describe what's going on between the United States and Iran at this moment?

#Chas

Well, much ado about nothing, actually. I think there's a total impasse. There are no negotiations going on, despite the repeated statements by President Trump that negotiations are on the verge of producing a breakthrough. This all seems to be entirely performative, with the objective of manipulating stock prices, share prices on capital markets, not accomplishing anything with Iran. There have been exchanges through Pakistan of a memorandum of understanding. Memoranda of

understanding are not agreements. They are basically an agreement to attempt to make an agreement. They are a framework for future negotiations. The framework for future negotiations does not exist between the two parties.

The demands on both sides completely ignore the requirements of the other side. The United States continues to now focus on one of the many issues that it raised at the outset of this war, namely Iran's nuclear program. It has abandoned its objective of regime change, realizing that it's impossible. It also wants to open the Strait of Hormuz. It's chosen a most peculiar method of doing that, which is to mount a counter-blockade. And so on the American side, basically the agenda continues to be driven largely by Israel, which is obsessed with the nuclear program in Iran and the role of Iran as the major check on Israeli hegemony in West Asia. But the United States is under pressure both domestically due to rising gasoline prices.

They're now well over \$4.50 a gallon. One gallon has about four liters, for those of you who are in the modern world and use the metric system. And so this is about a 40% increase in prices, and it's going up. We're looking in June at the exhaustion of the oil that was shipped out of the Strait of Hormuz, and therefore we're looking at another probably 20% or so rise in prices. In India, your own country, I understand the Prime Minister has called for austerity and limits on the consumption of various things, not purchasing gold, among other things, which I wish him luck with. As far as I recall, Indian women rather like gold, and it has been a major trading item for centuries.

So on the Iranian side, the objectives are the achievement of a broad peace in West Asia that will guarantee Iran against future attacks by Israel and the United States, control of the Strait of Hormuz not only to generate income but to maintain leverage on the world, and the ending of sanctions. Iran has also demanded reparations for war damage. And, of course, this has been dismissed by Donald Trump now as totally unacceptable. So I think, Jyotish, we're actually beginning to see where this may all end up, and perhaps we should discuss that. At the moment, nothing is going anywhere. We're in a war of fatigue, that is to say, an economic war of attrition, with each side expecting the other to be exhausted and to fold, but neither showing any sign of it at present.

#Mudiar

What do you make of arguments that Trump is desperate to end this war, given the military casualties or the losses it's taking on, and given the unpopularity and the economic impact domestically, primarily the rise of gasoline prices in the U.S. and inflation being such an important issue with the midterm elections coming in less than six months? What do you make of the argument that the Trump administration is desperate to end this war?

#Chas

Well, I think it is desperate to end the war, and it shows many signs of panic, including rapidly oscillating demands. From one hour to the next, you can't tell what the administration is proposing.

And the Trump administration has basically run out of options. But I don't think the pressure on it is coming from casualties, in part because they have been successfully covered up. I think there have been many casualties, but we don't know how many, in either Israel or the United States. Trump is under pressure from Israel to resume the war. He's resisting. We now see Prime Minister Netanyahu declaring that Israel has to declare its independence from the logistical support of the United States, cut off the aid that it gets annually from the United States, and do things on its own.

That's obviously a response to pressure from the Trump administration for Israel to cooperate in ending the war when Israel does not want to do that. One of the demands that Iran makes, which I didn't mention, is an end to the war in Lebanon. And that is something Israel is determined to pursue as part of its expansionist territorial expansion and its subordination of potential enemies through its management. So the pressures are largely economic. They're mounting domestically, as I mentioned. We're seeing the beginnings of a wave of significant inflation born of the various shortages that are emerging—not just gasoline, not just diesel fuel, but fertilizer, aluminum, gas, helium, you know, a whole range of plastics, petrochemical products.

And some parts of the country are worse affected than others. California, which tries to tax oil and gas to promote social and environmental goals, also is the most vulnerable to changes in imports because it is the largest state in terms of the proportion of imports of oil and gas. And the Jones Act, which is something from the 1920s that is responsible for killing the American shipbuilding industry, requiring only American-built vessels to travel between American ports, has been suspended, with the result that some supertankers—the United States does not build such tankers—foreign-built supertankers are now supplying California.

There's talk in Washington of removing the tax on gasoline, the federal tax, in order to ease the pain. But the pain is present, and it's going to mount. There's also pressure internationally. It's very clear that the Gulf Arabs, with the exception of the United Arab Emirates, which remains obdurate and focused on joining its Israeli partner in the Abraham Accords in restarting military action—with that exception, the Gulf Arabs are all very clearly engaged in quiet diplomatic discussion with Iran of a post-war order in which American forces will not be present. You can see this evidenced in the Iranian approval of a Qatari gas carrier, a natural gas carrier, which was permitted to go through the Strait of Hormuz.

Presumably, it will hug the coast within the 12-mile limit on its way to Pakistan, which is badly hurt, as India is, by the slowing of exports from the Gulf. I think we can begin to see where this is all going to end. The contest between the United States Navy and the Iranians to see who can outlast the other is going to be won by the Iranians. They're there. They are able to take punishment. They are hurting, but they are finding ways to alleviate that hurt. Sustaining the American fleet off the coast of Iran at a safe distance to conduct a blockade is going to be very difficult for the United States because this is at the end of a very long logistical line. Access to local ports is no longer available.

And so the wear and tear on the U.S. Armed Forces, the United States Navy, the Marines, and the ships themselves is taking a toll that eventually will cause a retreat, in my view. But beyond that, I think we can see, as I said, where this is all going to end. First of all, it will end with some sort of reconciliation between the Gulf Arabs and Iran, which involves the removal of the American military presence from the Gulf. The United States has proven unable and unwilling to defend the Gulf Arabs against Iran. The bases on their territory have become targets rather than defense assets for them.

And so that is clearly unfolding. Second, I believe Iran will remain in control of the Strait of Hormuz. That is a development because it contradicts 263 years of Anglo-American maritime supremacy and the rules established under that, including those in the United Nations Convention on the Law of the Sea, which declare that straits—meaning narrow bodies of water that connect international waters, in this case the Persian Gulf inside it and the Arabian Sea outside it, or the Gulf of Oman—cannot be obstructed, according to the U.N. convention. Now they are obstructed.

That rule was established first by British sea power after the defeat of France in the Seven Years' War in 1763. The baton of maritime hegemony passed to the United States in World War II in March of 1943 with the Battle of the Bismarck Sea. And this is over now. Land-based missiles, artillery, if you will, can now strike at huge distances. The history here is interesting because it began with the range of cannons in the 18th century, which was three miles. So a ship that came within three miles of the shore was in danger of being struck, but that limit was overtaken by events. And, of course, now we have the ability to strike ships at a distance of 2,000 kilometers or 1,500 miles, or at least with drones within a 300-kilometer or 200-mile limit.

So we're watching the decay, the fall of a fundamental element of global order as part of this war. So that's another result. The third result will be that while Iran will tighten its repression of its citizens in response to their suffering from continuing sanctions, those sanctions are becoming ever less effective. I think they will continue, but the world will be less and less respectful of them. And American power to impose unilateral sanctions, which are illegal under the UN Charter but nevertheless have become commonplace, will decline. So American power in the financial sector, since this is all based on the control of financial transactions, will ebb away.

But finally, and perhaps most consequentially, a war that is now justified as aimed at ending Iran's nuclear program has galvanized its nuclear program. Iran is almost certain to develop nuclear weapons and the means to deliver them first to Israel and ultimately to the United States. It will follow the path, in other words, of North Korea in response to the maximum pressure to which it has been subjected. So we end up with a world in which Iran is still sanctioned. It still controls the Strait of Hormuz. The American military presence in the Gulf is gone. Israel is chastised but not defeated. And Iran has a nuclear weapon. This is not what those who started the war wanted to see come from it, but it is where we are headed.

#Mudiar

Among four of the endpoints you just mentioned, I wanted to ask you a little bit about your second point, about an endpoint where some kind of rapprochement opens up between Iran and the Gulf states. In a recent interview with the former Prime Minister and Foreign Minister of Qatar, Hamad Sheikh Al Thani, he said that the recent waves of attacks by Iran on the Arab states are seen by them as making it difficult for further diplomacy. Now, of course, he's not someone who seems to me very pro-Western, let alone pro-Zionist. I mean, he comes across as a reasonable person who sees the greatest threat as Israeli expansion in the region and Israel's attempt to reshape the region by force. But there are others who say that most people living within the Gulf states have sympathy for what Iran is doing. I wonder what your thoughts are about the sentiment within the Gulf states regarding what Iran is doing.

#Chas

Well, His Highness is absolutely correct. It will be very difficult to reconcile. But the fact is, on the Gulf Arab side, they have no alternative. Iran is not going to go away. It is more likely to continue to perfect its arsenal than to abandon it. And the American bases, which were there in the view of the Gulf Arabs to protect them, have turned out to be lily pads from which to project power against Iran. Iran understandably finds that unacceptable. Iran, for its part, needs a good relationship with the Gulf Arabs and has been very careful, while it has attacked the American bases and done damage, not to cross the line into utterly incapacitating either their energy sectors or, more dangerously, their desalinated water supplies.

And Iran has continuously declared its willingness to negotiate a new arrangement for the Gulf. In the case of the Gulf Arabs, necessity will drive a reconciliation. They will be holding their noses while they do that. It will not come easily. There are people in every one of the Gulf Arab countries who are no doubt just as desiring of vengeance as those in the UAE who distinguish themselves. But on the Iranian side, there is a recognition of a strategic requirement for a good relationship with neighbors, especially given the menace that Israel presents and will continue to present. So I think this is—nothing is inevitable in life—but this is something that I'm pretty confident will happen.

#Mudiar

And this is a difficult question to answer, which is, you've defined the endpoints in terms of the four or five possibilities that you just spoke about. But if I were to ask you, what timeline or what length, what period of time do you foresee change to reach that endpoint, given, as we have discussed, we see two forces acting in opposite directions? One side is Israel, which wants to continue and prolong and sustain this war of attrition. The other forces being international pressures, domestic pressures, political and economic, coming out of the United States, and all kinds of pressures that the U.S. administration is facing, and also the Iranian administration is facing, from economic to military. What is the duration, possible duration, that you can see in terms of realization of these endpoints? Possibly these are different timelines. I mean, the...

#Chas

I think they are different timelines. For the Iranians, the timeline is related to reservoir, oil field reservoir pressure, and the ability to maintain it. They can dial down production levels, which they've done, in fact. They've actually been making more money with less production, given the rise in oil prices. And they can develop additional markets, some of them overland, some through the Caspian Sea. For example, while it would take time, Iran can connect its gas supplies to Turkmenistan, which has a pipeline that goes into China, and thereby, perhaps through a gas swap, enable exports to its largest market.

And in the Caspian, Russian tankers can help Iran export its oil. We're also seeing the development of road and rail traffic to Pakistan and potentially—well, there is a rail connection to China. Evidently, some fuel is going over that. So Iran's reservoir pressure, according to some experts, will be a problem in about four months. We're in May, the middle of May. So what is that—September, I guess? And so that's the crunch point for Iran, maybe. Others say that perhaps the timeline is longer. For the Americans, the timeline peaks in the summer. In June, we will see a huge increase again in oil and gas prices in the United States.

The conceit of independence, energy independence, will be revealed for the limited achievement that it is. That is to say, yes, the United States doesn't have to import much oil and gas. We're an exporter. But no, we do not control the price. The price is determined by the world market, and that is what affects consumers, and consumers are voters. And therefore, the pressure in the middle of the summer will be both—you know, you will see both protests and a further drop in Trump's popularity, danger for the Republicans in the midterms, all of which may produce something, a change in policy or stance.

There is also, as I mentioned, the issue of how long the American flotilla can be maintained in the Gulf of Oman and the Arabian Sea. I don't know the answer to that, but it's very expensive in terms of operations tempo, wear and tear on crews, and wear and tear on the vessels themselves. There is no possibility in the meantime that—let us say that that timeline is also sometime in the summer, perhaps June or July, when the flotilla becomes a losing cause, perhaps. You know, that also is pressure on Donald Trump to find some way of declaring victory so that he can exit this war, which he obviously wants to do, to go back to your question.

I think desperation is not a bad word to describe his mood on this subject. Um, he's off to China at the moment, to be there the 13th to the 15th of May. I expect a lot of pomp and circumstance. The Chinese are superb at providing that, but I don't see much of substance coming along. There's no evidence that Sherpas have been at work preparing the summit or that anything very substantial will come out of it. So Donald Trump's ego will be gratified, but American interests not really advanced. And there is a danger, of course, that the temperamental Mr. Trump, in his discussions with the stolid Mr. Xi, will blow his top and we will have a debacle. So this is something to watch. Anyway, he's not going there as a demonstration of American power, but really as a supplicant.

He's going to ask the Chinese to help end the war by putting pressure on Iran, which I very much doubt they will do, because they have a great deal at stake in the continued survival of Iran as an independent sovereign state, whatever they may think of its religious nature, rule, and ideology—which is not much. So I think all these things are coming together, I would say, before September. And we are, I think, going to enter the world that I mentioned, in which Iran may not yet have declared a nuclear weapon, but it will probably have one. It only takes a couple of weeks to transform the 60% enriched uranium hexafluoride into the 90% or 92% enriched uranium that is ideal for a nuclear warhead.

And Iran can do that underground, unobserved. There's no longer any international supervision of its nuclear program. And I should have mentioned another factor here, in addition to possessing a nuclear weapon, which will not be good news either for China or Russia. China and Russia's relationship with Iran is likely to further consolidate. And we're looking at a Persian Gulf in which China, Russia, Iran, and the Gulf Arabs will have common interests in preserving stability and peace, without the United States. So the strategic implications to play out probably won't become obvious until next year. I don't think they will be immediately apparent. But we're looking at a return to low-intensity conflict, probably at a subsiding level.

And it's always possible that Donald Trump will decide to leave with a bang rather than a whimper from the Gulf, in which case I expect the Iranians, who have declared that they are ready to go again, will clobber Israel and probably do a little more damage to any Gulf Arab country that they see as cooperating with the United States, specifically the UAE. So, this isn't a moment in which to relax. It's to be vigilant. And as the final point I would make, which is the one that the Gulf Arabs clearly understand very well, and Pakistan understands, China understands, India understands, and that is there is a way of opening the Strait of Hormuz. You negotiate with Iran. And that is the only way you can open it. And that is the only way you can achieve relief from the shortages that are beleaguering all these countries that are dependent on fuel supplies from the Persian Gulf, as well as fertilizer and other supplies.

#Mudiar

An obvious corollary to the four endpoints you just discussed, the endpoints being, of course, widening Iranian power over the Persian Gulf, realignment of relationships between the Gulf states and Iran, decline of U.S. financial and ultimately overall hegemony in the region, and the further development of the Iranian nuclear program into some kind of weapon-grade capability. The corollary is, if these are the four endpoints, skipping ahead in the timeline, what happens to Israel then? I mean, that's an obvious corollary that comes to my mind.

#Chas

Well, it depends on the manner in which Donald Trump relieves himself of this war. If he feels obliged to initiate another attack, even though the supplies of weaponry and interception capabilities will not have been restored, then Israel will be clobbered, and many Israelis have had to come to grips with the reality concealed by very strict military censorship that their country is now vulnerable, that they do not have a way of effectively defending themselves against the more advanced weaponry that Iran has developed, or even, for that matter, drones. So, there's been a lot of emigration from Israel. Israel's unraveling.

And when you see Prime Minister Netanyahu saying that Israel has to cut its dependence on the United States, you are seeing evidence of the unraveling of the support for Israel that has been essential to its survival. There is no alternative to the United States. The Europeans may feel guilty about the Holocaust and therefore inclined to support Israel, but even they are losing their patience with genocide, with war in Lebanon, with religious persecution of Christians and Muslims, and the war in Iran. And they are not prepared to step in, even if they could, and take the place of the United States. There is no alternative to the United States for Israel, and Israel's relationship with the United States is rapidly decaying.

So what we're looking at, potentially, is the repeat of the history of the two Christian kingdoms in the Middle Ages, just before the Renaissance, the 11th and 12th centuries in Palestine, which also depended on external support. And when that external support was removed, they collapsed. So the question is, where are the Israelis going to go? I mean, I think there are Israelis who are prepared to live in a democracy that includes non-Jews, and clearly a single state in Palestine, whether it's called Israel or Palestine, which embraced both Arabs and Arab Muslims and Christians and Arab Jews as well as European Jews, would be a society in which the Jewish component could continue to play a leading role, just by virtue of its capabilities, level of education, energy, and commitment.

But to take something like that happening, it's going to be very hard because Israelis, instead of taking October 7th and the Hamas breakout from the concentration camp of Gaza as a caution and a reason to reconsider a purely military strategy for survival and ethnic cleansing as a means of consolidating Jewish control, have seen this as cause for vengeance at the level of genocide. And the polls show that the problem is not Mr. Netanyahu so much as the entire Israeli citizenry. About 80% support the war with Iran, notwithstanding the damage they've taken, the punishment they've earned.

And they mostly support the genocide in Gaza. There's no effort being made to curtail settler pogroms. On the contrary, the government is supporting them. And the war in Lebanon is seen as a great opportunity for Israel to expand its borders to the north. So this is a society that is essentially, in clinical terms, sociopathic. And that's not going to change if Mr. Netanyahu falls from power; that will not solve anything. The basic obstacles to any kind of peaceful coexistence between Israel and everyone else in West Asia will continue. And those differences are now very sharp, as well as irreconcilable.

#Mudiar

And while you are right about the long-term impact or the long-term possibility of Israeli, let's say, collapse, if the other endpoints are met, if one thinks about the short-term impact of this war on Gaza, it has been devastating—from the passing of the death penalty law to the expansion of the so-called Yellow Line and occupation of Gaza, the expansion of settlements in the West Bank. I mean, you can keep on adding, but the primary point being that since the launch of this war, the Palestine issue has lost some traction, even among analysts who have been focusing on Palestine for the last two years or so.

#Chas

I think there's been—certainly attention has been distracted from the Palestine issue. But Hamas basically achieved its objective of putting that issue back on the global agenda from which it had fallen off. The Abraham Accords were an effort, successfully, to bypass the Palestinian issue, apparently. That is no longer possible. I agree completely with you that in the short term, which is the term that most Israelis seem to prefer using to analyze things, Israel has done very well. It has destroyed Syria as a rival or as a path to the replenishment of Hezbollah's armaments in Lebanon. It has seized southern Lebanon. It has seized part of Syria.

It is, as you said, conducting a slow-motion, less visible genocide in Gaza, but it is still taking control of Gaza. And, you know, it even persuaded Donald Trump and his cronies that they should build a luxury real estate development on top of the genocide-laden cemetery of Gaza, which is an incredibly macabre development. So, again, I come back to why is Binyamin Netanyahu then saying we need to divorce ourselves from the requirement of American support? There's a problem. And what the nature of the problem is, is concealed, because neither side has an interest in publicizing it. Netanyahu's claim to power in Israel rests on his purported ability to manipulate the United States.

Donald Trump is caught between the Epstein files and the blackmail that they facilitate for Israel, and his wealthy Jewish donors who are Zionists. You know, I should add, a growing number of Jews in the United States are not Zionists, but his donors famously are. So I think neither side has any interest in admitting that there's friction and trouble in the U.S.-Israeli relationship. And yet there is, clearly there is. And some of Netanyahu's opponents have seized on this to criticize him without, of course, providing any evidence that they could fix the problems that have caused the problem in U.S.-Israeli relationships. So, there we are.

So, once again, there's much more going on below the surface, not just in the Gulf between the Gulf states and Iran, but between the United States and Israel, than people realize. And the Europeans, in the meantime, slowly pointed out the eclipse of the Palestinian issue. We see Kaja Kallas, my favorite spokesperson for anything, stating that the violence of the sanctions by the European Union—one wonders why the European Union doesn't sanction the settlements, inasmuch as they

are illegal under international law. But, of course, the more egregious behavior attracts press attention and is an embarrassment to the EU, and I guess you can understand this in terms of crass political calculation, if not in terms of principle.

#Mudiar

We'll leave it there, Ambassador Freeman. This was a very helpful conversation. Thank you so much for your time.

#Chas

Well, glad to be with you, Jyotish. And let us look forward to the day when we have something more pleasant to discuss than what's going on in the world.

#Mudiar

Yeah, you've been saying this for a while, and that's been noticeable from my end. But yeah, like you, I hope there is something better to talk about next time we meet.

#Ayushman

Hi, my name is Ayushman. I, along with Jyotishman, have started this platform. Over the last two years, we have tried to build content for the left and progressive forces. We have interviewed economists, historians, political commentators, and activists so far. If you have liked our content and want us to build an archive for the left, I have two requests for you. Please do consider donating for the cause — the link is in the description below. Also, if you are not able to do so, don't feel sad. You can always like our videos and share them with your comrades. Finally, don't forget to hit the subscribe button.