

A Critical Point in the Iran War

by George Friedman - May 26, 2026

After three months, the war in Iran has reached a critical point. The conflict itself has become frozen in a way. The Islamic Revolutionary Guard Corps remains in control, and it does not seem to have been significantly weakened as a fighting force. Israel appears to have reduced operations in Iran, focused now on fighting Hezbollah in Lebanon. The Strait of Hormuz remains essentially closed, with some movement of vessels allowed by Iran and the United States, each in a position to block it but not to clear it. The peace negotiations have so far failed. The U.S. wants Iran to surrender its nuclear material and open up the strait; it has done neither. In short, neither side has done enough damage to compel the other into surrender.

From here, the war can go in one of three ways: One side cripples the other, a peace agreement is reached, or it becomes one of those permanent wars, lasting for many years with neither side willing or able to end it.

The question, then, is whether the U.S. is willing or able to launch a crippling attack on the IRGC. The flipside to that question is whether Iran thinks it can withstand such an attack. Considering Tehran has yet to capitulate, it probably believes it can.

So before the U.S. decides its next steps, it needs to determine whether it has the military capability to launch a crippling offensive, and whether it has the political capital to spend on such an attack. Support for the war in the U.S. is limited, particularly because of President Donald Trump's earlier position that he would oppose wars in the Eastern Hemisphere. And it's an open question whether an attack would galvanize the Islamic Republic in opposition against the United States. So far, the IRGC seems to be in control of Iran internally, and there are no clear signs inside the country of an anti-war movement. Third-party pressure should not be ruled out; the price of oil and the knock-on effects for food prices and inflation could compel another country to spur one side of the war to action (or inaction). If such a third party currently exists, it clearly hasn't applied enough pressure to make a difference.

So to me, this means neither the U.S. nor Iran is willing to change its demands for the sake of an agreement, and no one else is willing or able to force them to the table. Iran cannot make concessions without appearing weak, and though the U.S. has more room to maneuver, it doesn't yet

have a reason to.

The most obvious solution, then, would be a massive U.S. buildup of forces to intimidate Iran. If it fails to be intimidated, then Washington would launch an invasion, destroy the IRGC and impose peace.

Domestic political considerations aside, there are a couple of problems with this approach. First, Washington has a poor record of invading countries to impose its goals. Second, the IRGC is no pushover. It would be defending its homeland and its ideology, so there is no guarantee that the U.S. could defeat Iran militarily.

Given what has transpired in Ukraine, it's clear that the nature of war has changed such that drones and missiles can easily cripple conventional ground attacks. Iran doesn't have the requisite satellite intelligence for targeting – although it could obtain as much from other countries. At the same time, the dispersal of IRGC ground forces means that U.S. forces would have a difficult time targeting the IRGC as well.

The alternative, then, would be intense air attacks to destroy Iran's ability to build drones and taking control of the perimeter of the country to prevent other countries, particularly Russia, from sending drones of their own in support of Iran. This would require isolating Iran before launching the main offensive. The process of isolation alone would be difficult, requiring a massive military force even before the invasion began. In the meantime, the price of oil would weaken economies around the world, including America's, decreasing Trump's popularity and loosening his control.

The other option would be an enormously massive deployment of U.S. drones in concert with massive air and ground attacks to cripple Iran's military. The manned bombers of World War II and Vietnam weakened the enemy but did not break it. Now, the bombs deliver themselves, but the kill zones of conventional weapons are nonetheless limited, and the number of drones and missiles needed to break Iran would be enormous.

The question of war is not whether it should be fought but whether it can be fought at the price a nation is able and willing to pay. The war in Iran does not appear to meet the criteria. Still, this is a critical moment. Whether my analysis is right or not, it seems that Iran will defer to the U.S. to escalate the war. If it does, it will play to Iran's advantage. It would last a long time, and a long war would not only hurt Trump domestically but also hurt the world economically, at least as long as the Strait of Hormuz is closed.

It is not clear to me what Trump will decide, but every decision carries danger and political and economic risk. Geopolitical analysis does not predict how a war ends, but it does predict that the U.S. needs this war to end. The question of Iran's nuclear capabilities can be addressed later.

Author: George Friedman

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