

# The Iran War and How It Might End

by George Friedman - April 27, 2026

The U.S.-Israel war against Iran was to a great extent predictable. The United States feared Iran becoming a nuclear power. Israel feared that as well, and was also concerned about the Islamist forces – in this case, Hezbollah – that Iran supported in Lebanon. For the United States, the latter was at most a secondary concern, but the nuclear threat was potentially existential. The United States attacked Iran's nuclear facilities almost one year ago, damaging but not destroying the program. In subsequent negotiations, Iran rejected the U.S. and Israeli demand that it end its nuclear program, and so war was initiated on Feb. 28.

Some have argued that Israel's prime minister, Benjamin Netanyahu, convinced U.S. President Donald Trump to join it in attacking Iran by claiming to possess intelligence suggesting that, if there were an attack, the Iranian people would rise up against their regime. This strikes me as dubious for three reasons. First, the American interest in preventing a nuclear Iran was very real based on Iran's support for the forces that launched the 9/11 attack on the United States and its continued provision of a safe haven to al-Qaida leaders in Iran. With or without Israel, this was a very significant reason. Second, although I have never met Trump, I do not see him as particularly amenable to persuasion. Finally, although Israel may have presented the U.S. with intelligence on the likelihood of an uprising, I suspect that more persuasive was the fact that before the war there had been very large demonstrations in Iran against the government – which dissipated only after the Islamic Revolutionary Guard Corps killed untold thousands of civilians.

Importantly, it would seem that Trump believed that airpower, with minimal risk to American lives, could force Iran to capitulate. This last assumption was incorrect, leading to the current situation. I also suspect, but don't know, that senior U.S. military commanders, including the U.S. Army chief of staff, warned Trump that this strategy would fail. This is speculation on my part, based on the fact that he and other generals were dismissed after the war was launched.

The failure of massive airstrikes to reach their desired goal – the destruction of the Iranian nuclear program and regime change – along with the Iranian disruption of the Strait of Hormuz and Tehran's attacks on oil facilities in other countries in the region, has forced oil prices to surge globally, including in the United States.

This has created a major political problem in the United States, based on both the economic impact and the fact that the action in Iran is reminiscent of prior wars in which the United States failed to achieve its goals: Vietnam, Iraq and Afghanistan being the longest and most costly. None ended with an American victory, and all weakened and undermined the reputations of presidents: Lyndon Johnson in Vietnam, George W. Bush in Iraq and Joe Biden in Afghanistan. Even more significant is that Trump was elected in part because he pledged not to engage in such wars, particularly in the Eastern Hemisphere. All of this raises the question of how the war will end.

There seem to be three possibilities. First, a U.S. victory through airpower alone. Second, the deployment of ground forces to destroy the Islamic Revolutionary Guard Corps and occupy Iran. Third, a negotiated settlement.

The first, victory through airpower, is unlikely. Airpower alone does not generally force nations to capitulate; to defeat a capable enemy, ground forces are typically required. A ground war against what appears to be a capable and motivated IRGC would take a long time, as Iran is a very large country, and it would incur substantial American casualties. This would profoundly weaken Trump's presidency and damage his legacy. Therefore, the only solution, save fomenting an uprising in Iran – something that appears very unlikely given the recent past – is a negotiated end.

The United States enters these negotiations with a weak hand. First, from the Iranian side, the outcome of this war will determine the future of its nation and ideology. The U.S. has much less at stake. Thus, the Iranians have everything to lose if they capitulate or accept American terms in negotiation. Second, given the Iranian strategy based on raising oil prices and causing global economic problems, it is difficult for the U.S. to generate an effective anti-Iranian bloc of nations, since the other nations' primary interest is simply to end the war as quickly as possible, which does not mesh with a satisfactory end for the United States.

As important, the Iranians are certainly sophisticated enough to understand the internal American political process, in which the war is widely unpopular across the ideological spectrum, thereby potentially forcing Trump to reach an agreement beneficial to Iran. In this case, time is on Iran's side. The U.S. sought an early uprising against Iran's government; Iran sees in the United States not an uprising but growing opposition to the war, similar to that which emerged years into the Vietnam, Iraq or Afghanistan wars. From Tehran's point of view, time is on its side, and the more that Trump claims peace is here and the Iranians demonstrate that not to be true, the weaker the Iranians assume the president will become. Iran, given the brutality of the IRGC, does not seem to have that problem.

There are two ways to reach a negotiated end. One is with a settlement in which the U.S. gets far less than it wanted but avoids a multiyear war. This would leave Trump's reputation significantly damaged. The other is to somehow get another nation (or other nations) to confront Iran. This nation would need to be able to intimidate Iran, and the price it forces the U.S. to pay in return for its help might be significant.

The only nation that would be sufficiently intimidating to Iran, and might have a reason to play this role, is China. China is an oil importer, with more than half of its supply flowing through the Strait of Hormuz. As I have said before, China's economic well-being is significantly dependent on exports to the United States, which was a foundation of China's economic development and stability. U.S. tariffs have to some extent limited those exports. A summit between President Xi Jinping and Trump designed in part to solve this Chinese problem is scheduled for May, and there is every indication that the Chinese will not cancel it.

It is not clear, given what the Iranian government has at stake, that even Chinese pressure on Iran would allow it to make major concessions. But China might be able to get Iran to abandon its nuclear program, in return for economic concessions from China and likely the United States. China could afford this, but whether the United States could afford China's price for this help is another question. On the other hand, Beijing really needs a shift in American economic policy toward China, and the U.S. might be willing to pay that price, higher than would have been on the table had the Iran war not happened, but better than simply ending the war in Iran without any clear benefits gained, and with a higher and unknown American price if the war continues.

Is this possible? It should be noted that while China has condemned the Americans for the war, it has taken no steps against the United States. Whatever aid it may have offered Iran was not on the order that would change the balance of power. From the American point of view, the only vital thing is an end to Iran's nuclear development. A nuclear Iran is not something that the Chinese would necessarily welcome either.

China needs a new trade agreement with the United States. The United States wants that too, hence the summit. Pressuring the Iranians would be a small price for the Chinese to pay. But then the question is what else China would want from the United States. There might be a price but not a radical one, given how much China needs this trade agreement. And for the United States, the other options are to end the Iran war without any ability to claim success, or to carry on in the tradition of Vietnam, Iraq and Afghanistan, which for Trump is impossible. Stranger diplomacy has happened.

**Author: George Friedman**

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