

WEBVTT

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<v SPEAKER_1>On this episode of Defence Deconstructed, which we recorded May 6, 2026, we're talking to Dr.

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<v SPEAKER_1>Thomas Juneau, one of the Canadian Global Affairs Institute's fellows and an expert on the Middle East and Iran.

00:00:11.580 --> 00:00:18.980

<v SPEAKER_1>We talk about the recent conflict between the United States, Israel, and Iran, some of the implications for Iran and the wider region.

00:00:19.780 --> 00:00:21.760

<v SPEAKER_1>Thomas, welcome back to Defence Deconstructed.

00:00:21.760 --> 00:00:22.800

<v SPEAKER_2>Very nice to be back.

00:00:23.960 --> 00:00:35.220

<v SPEAKER_1>Not so nice circumstances to have you back, but wanted to bring you back to talk about everything that's happened in the last two-ish months with the Persian Gulf, wider Middle East, Straits of Hormuz.

00:00:35.420 --> 00:00:39.520

<v SPEAKER_1>Maybe just get you off to start off the conversation, just high level.

00:00:39.900 --> 00:00:43.080

<v SPEAKER_1>What's your take on where things sit between the United States and Iran now?

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<v SPEAKER_2>Well, right now, we're in a really volatile, fragile, no war, no peace, and not just no peace, but no war, no peace negotiation equilibrium.

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<v SPEAKER_2>And it's not a fun equilibrium.

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<v SPEAKER_2>The no war part matters, because I think there's a fairly clear will on both sides not to go back to full out war, of the type we saw for a few weeks earlier this year.

00:01:04.180 --> 00:01:18.020

<v SPEAKER_2>On the US side, there's an understanding that it would be

very costly politically, and that it wasn't working anyways, the impact on oil prices and so on would be devastating for the American economy, especially in the context of midterm elections coming in November in the US.

00:01:18.320 --> 00:01:23.120

<v SPEAKER_2>On the Iranian side, I think there's a pretty clear preference not to go back to war as well.

00:01:23.740 --> 00:01:31.760

<v SPEAKER_2>With good reason, we've talked a lot in recent weeks about how Iran has made significant gains in the war, especially by virtue of its ability to block the Strait of Hormuz.

00:01:31.880 --> 00:01:33.740

<v SPEAKER_2>That's true, and we can come back to that.

00:01:34.060 --> 00:01:40.380

<v SPEAKER_2>But it's important not to forget the other side of the coin, which is Iran suffered heavy, heavy losses in this war.

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<v SPEAKER_2>We can detail them more if you want, but all of the American and Israeli strikes on Iranian military infrastructure, economic infrastructure, critical infrastructure, very costly on the Iranian side.

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<v SPEAKER_2>So all that to say there's a preference not to go back to war on both sides doesn't mean it's not going to happen because the situation is so fragile and just risky.

00:02:00.640 --> 00:02:02.860

<v SPEAKER_2>But that preference is there and it does matter.

00:02:03.060 --> 00:02:13.400

<v SPEAKER_2>But at the same time, it's not just that there's no peace, there's no serious peace negotiations or at least nothing that could lead to a sustainable stabilization, not just a volatile ceasefire.

00:02:13.700 --> 00:02:18.960

<v SPEAKER_2>Because both sides feel that they have the bigger end of the stick, both sides feel that they have more leverage.

00:02:19.120 --> 00:02:28.140

<v SPEAKER_2>The Iranians by virtue of their ability to close harbors, Trump by virtue of him being Trump, and the US is the great power, the other has to bend the knee, etc., etc.

00:02:28.540 --> 00:02:39.220

<v SPEAKER_2>So right now, all that to say, there's a clear preference not to go back to war, but there's also no serious effort to stabilize things beyond just a short-term ceasefire.

00:02:39.360 --> 00:02:48.040

<v SPEAKER_2>So it's a really volatile situation that even if both sides would prefer not to see it, could explode this week, next week, next month.

00:02:48.760 --> 00:02:50.100

<v SPEAKER_1>You touched on this a little bit.

00:02:50.100 --> 00:02:56.920

<v SPEAKER_1>Just get you expand a bit about what is the state of Iran, the country, the people, the economy, the regime.

00:02:57.080 --> 00:02:59.180

<v SPEAKER_1>I know there's lots of backstory to this.

00:02:59.180 --> 00:03:11.240

<v SPEAKER_1>So start wherever you think the movie needs to appropriately to contextualize what's happened since the end of February, and how that changed the state of affairs in Iran to get to where we are today, early part of May.

00:03:11.540 --> 00:03:16.860

<v SPEAKER_2>So I'll start with the regime and then the people, and then we can go on other aspects as well.

00:03:17.580 --> 00:03:35.960

<v SPEAKER_2>On the regime side, the regime is not about to fall, and I think for a lot of people that's stating the obvious, because there were months, weeks of war, almost two months, the protests before that, we've forgotten them, but there were massive protests just a few months ago in Iran, repressed and massive bloodshed early in the new year.

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<v SPEAKER_2>The regime is vulnerable, and there is a case to be made that the regime might be more vulnerable today than it's ever been, at least since the early days of the revolution in the early 1980s.

00:03:46.420 --> 00:03:47.980

<v SPEAKER_2>But it's not on the verge of collapse.

00:03:48.060 --> 00:04:19.440

<v SPEAKER_2>And that does really matter analytically, because when you listen to a lot of what comes out of Washington, for all the incoherence and all the contradictory statements that come from

President Trump, Secretary of State Rubio, Secretary of Defense Hegseth and others, there always seems to be an assumption somewhere, sometimes implicit, sometimes explicit, that if we could just push a bit more, that if we do a bit more strikes, that if we blockade a bit more, that if we announce a few more sanctions, that could tip the Islamic Republic over and lead to its collapse.

00:04:20.940 --> 00:04:24.360

<v SPEAKER_2>Here it's important to make a distinction between wish and analysis.

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<v SPEAKER_2>A lot of us may wish for the Islamic Republic to disappear, absolutely nasty regime, 100 percent true, domestically, regionally, but the reality and literally is that it is not on the verge of collapse.

00:04:35.360 --> 00:04:39.520

<v SPEAKER_2>If anything, what the war has shown is that it's a regime that is resilient.

00:04:40.220 --> 00:04:44.580

<v SPEAKER_2>It has a narrow but real base of support among the Iranian population.

00:04:44.940 --> 00:04:49.040

<v SPEAKER_2>Is it 10, 15, 20, 25 percent of the population that supports the regime?

00:04:49.160 --> 00:04:52.660

<v SPEAKER_2>Nobody knows and we could argue forever about the precise numbers.

00:04:52.800 --> 00:04:56.800

<v SPEAKER_2>What matters is that we're in those waters and from the regime's perspective, that's enough.

00:04:57.380 --> 00:05:04.340

<v SPEAKER_2>The regime also retains more than enough repressive capacity to choke off any opposition.

00:05:04.480 --> 00:05:08.120

<v SPEAKER_2>It is extremely effective in the brutality of its repression.

00:05:08.220 --> 00:05:12.380

<v SPEAKER_2>It worked in January and I have no doubt that it would work again in the future.

00:05:13.660 --> 00:05:25.180

<v SPEAKER_2>There is a caveat here and I would just add to this point, sorry, that as much as the strikes hurt Iran in many ways, one area that was not hurt much is that repressive capacity.

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<v SPEAKER_2>Yes, a good chunk of the Iranian Navy was sunk.

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<v SPEAKER_2>Yes, a good chunk of the Iranian Air Force was annihilated.

00:05:30.760 --> 00:05:36.540

<v SPEAKER_2>All that matters, but it doesn't matter for the repressive capacity of the regime which is largely still there.

00:05:36.840 --> 00:05:51.300

<v SPEAKER_2>There is a caveat here that I think is important to make, is that all of us, and I mean academics, I mean you guys in think tanks, I mean the media, people in government and intelligence community, we all have a very poor track record of predicting regime collapse.

00:05:51.440 --> 00:05:56.920

<v SPEAKER_2>Nobody can do it well, and it's not because we're collectively dumb, it's just because it's inherently extremely difficult.

00:05:57.560 --> 00:06:07.780

<v SPEAKER_2>So, while analysts can make their best assessment, which is my view that the regime is not on the verge of collapse, we need to remember that these things are extremely unpredictable.

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<v SPEAKER_2>Tunisia, late 2010, multiple other examples, including outside the Middle East, before or after that.

00:06:13.540 --> 00:06:14.880

<v SPEAKER_2>Always a useful caveat.

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<v SPEAKER_2>The other point you mentioned on where we're at now, in terms of the population, so directly building on what I just said, all of the resentment that led to the massive protests of late 2025 and early 2026 that were repressed in blood, that resentment is still there.

00:06:31.220 --> 00:06:35.540

<v SPEAKER_2>To me, it's a question of when, not if, people get back to the street in Iran.

00:06:35.540 --> 00:06:36.640
<v SPEAKER_2>I don't think it's now.

00:06:37.180 --> 00:06:40.780
<v SPEAKER_2>People don't go to the streets when bombs are falling or are at risk of falling.

00:06:40.780 --> 00:06:42.080
<v SPEAKER_2>That's just not how it works.

00:06:43.420 --> 00:06:45.600
<v SPEAKER_2>Is it going to be later this year or next year?

00:06:45.700 --> 00:06:46.860
<v SPEAKER_2>Nobody can predict that.

00:06:46.860 --> 00:06:50.660
<v SPEAKER_2>But I have no doubt that at some point there will be a spark and people will go back to the streets.

00:06:50.820 --> 00:06:55.080
<v SPEAKER_2>The most likely scenario is that the Islamic Republic is able to repress it at that point.

00:06:55.460 --> 00:06:57.620
<v SPEAKER_2>But again, it is vulnerable.

00:06:57.620 --> 00:06:58.780
<v SPEAKER_2>It has been weakened.

00:06:59.740 --> 00:07:02.220
<v SPEAKER_2>And these things are inherently unpredictable.

00:07:02.720 --> 00:07:17.680
<v SPEAKER_1>Any ability to assess whether or not all the bombing, you know, take all the Pentagon statistics, talking about multiple, multiple thousands of different strikes, has that any ability to assess whether or not that shifted attitudes amongst the Iranians about either their own regime or the United States or Israel?

00:07:17.880 --> 00:07:18.820
<v SPEAKER_2>That's a great question.

00:07:18.820 --> 00:07:22.020
<v SPEAKER_2>I think that the first part of the answer is we don't know.

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<v SPEAKER_2>I think we need to be humble because of there's been an internet blackout in Iran, not only since the beginning of the war,

but basically since late 2025.

00:07:30.880 --> 00:07:35.220

<v SPEAKER_2>There was a bit of an opening between the protests and the war, but not much.

00:07:35.720 --> 00:07:47.340

<v SPEAKER_2>So our ability to get first-hand reliable reporting on what's going on in Iran at the granular level in terms of popular feelings, popular support, or lack of support for the regime is inherently limited.

00:07:47.500 --> 00:07:53.860

<v SPEAKER_2>What I would say here is that there's a difference that sometimes we fail to make between rally around the flag and rally around the regime.

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<v SPEAKER_2>Rally around the flag is my country is being attacked, I don't support my government, but it will create in me and among my co-citizens a nationalist backlash.

00:08:04.880 --> 00:08:11.480

<v SPEAKER_2>Rally around the regime is my country is being attacked and that pushes me to support my government even if I did not support it before.

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<v SPEAKER_2>Anecdotally, what I think we're seeing now is to a limited extent a rally around the flag effect, effect and not much of a rally around the regime.

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<v SPEAKER_2>I think we need a bit more data and a bit more time for the dust to settle before we can really come to that conclusion in a more rigorous way.

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<v SPEAKER_2>But for now, cautiously, that's where I stand.

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<v SPEAKER_1>In economic terms, how would you assess the trajectory impact of the last couple of months?

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<v SPEAKER_1>The country was living under extensive sanctions at one point early on.

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<v SPEAKER_1>I thought in one of the more bizarre occurrences, the US

was unsanctioning both Iranian, Russian, oil of some types and carriage.

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<v SPEAKER_1>But now with the straits closed, I presume that really significantly affects remaining Iranian commerce.

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<v SPEAKER_1>How do you assess all of that?

00:08:57.860 --> 00:09:01.760

<v SPEAKER_2>Well, the economic impact is huge and that has to be the starting point of the answer.

00:09:01.780 --> 00:09:05.300

<v SPEAKER_2>It is devastating for Iran, for the population, for the government.

00:09:05.300 --> 00:09:07.000

<v SPEAKER_2>But there's a huge nuance at this level.

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<v SPEAKER_2>I think we can also start by taking a step back to answer that question.

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<v SPEAKER_2>Remember that before the war, Iran, the population, the regime were already under a massive sanctions regime that was significantly damaging the Iranian economy.

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<v SPEAKER_2>There is a separate debate here that does matter to mention among economists and watchers of Iran.

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<v SPEAKER_2>Yes, the sanctions have hurt a lot over the decades, financial, commercial, trade, economic sanctions, but a lot of the economic damage that we have seen in Iran over the decades, high levels of inflation in the high double digits, not only high unemployment but very high underemployment, especially among the youth which is a major driver of dissatisfaction.

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<v SPEAKER_2>The Iranian Rial, the currency which fell to 1.4 million to the dollar, which is an insane number as of late 2025.

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<v SPEAKER_2>All of that is in part due to sanctions, it is also in part due to economic mismanagement by the regime, a highly corrupt regime that has hostile foreign investment laws, a lot of economic

mismanagement and so on.

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<v SPEAKER_2>In practice, it's difficult to disentangle the two and the two of them matter.

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<v SPEAKER_2>When the war started, Iran was already suffering economically a lot.

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<v SPEAKER_2>The war made all of that worse.

00:10:16.660 --> 00:10:25.380

<v SPEAKER_2>The blockade is making that even worse now, but even the war itself, the US and Israel bombed steel factories, cement factories.

00:10:25.740 --> 00:10:31.120

<v SPEAKER_2>Some, not that much, but some energy infrastructure, other infrastructure, transport infrastructure.

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<v SPEAKER_2>As far as I know, we are not in a position now, as of early May, to quantify that economic impact in granular terms, because we don't have the data.

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<v SPEAKER_2>But clearly, the already difficult economic picture will get worse, and not only in the short term, but in the midterm, because some of that damage, including steel and cement factories, for example, will take a long time to recover, especially in a context where the government's priority will be to rebuild the arms industry that was shattered before rebuilding economic infrastructure.

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<v SPEAKER_2>Here I would add one point that is important to keep in mind when having these economic discussions on Iran, is to make a difference between the overall economic impact when you look at aggregate data like numbers on inflation, GDP, negative growth, unemployment or underemployment.

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<v SPEAKER_2>All of that matters, but the government of Iran, the Islamic Republic has shown a very strong ability not only to pass on that pain to the population but also to profit from it, whether it's sanctions, whether it's diplomatic and economic isolation, and now the blockade, the IRGC in particular, but the regime as a whole has built a massive apparatus that allows it to thrive in these conditions and to enrich themselves personally.

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<v SPEAKER_2>All of that economic pain that we see when we look at the aggregate economic data, does matter, but it's important to understand that in practice, it doesn't necessarily mean, at least in the short to midterm, a weakening of the regime and can actually mean it's strengthening.

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<v SPEAKER_1>Just qualitatively, a lot of the other countries recently, obviously hugely impacted by the closer the straits of homoers, there were some other forms of infrastructure to get energy products out to the Red Sea overland pipelines.

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<v SPEAKER_1>Was Iran largely set up to do export through the straits, or do they have other overland pipeline or other arrangements to get some of their energy products in particular to other markets?

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<v SPEAKER_1>Are they really being impacted exclusively, or do they have some other options in terms of where they can get to market?

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<v SPEAKER_2>The impact is significant for sure, because a good majority of Iran's oil exports in recent years and small number of decades went to China, and to a lesser extent other Asian countries, in many cases through various mechanisms to evade sanctions, because technically you're not supposed to do that.

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<v SPEAKER_2>There are two overland routes that Iran has used, and according to a number of reports that I see seems to be intensifying now, is basically smuggling oil by truck to Iraq towards the west, and Pakistan towards the east.

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<v SPEAKER_2>That appears to be intensifying, notably on the Pakistani side.

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<v SPEAKER_2>That allows the IRGC and the commanders who control these overland truck smuggling routes to enrich themselves, but in the overall bigger picture, it's fairly small numbers.

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<v SPEAKER_2>The Pakistan angle is really interesting, by the way, because Pakistan is one of the most affected countries.

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<v SPEAKER_2>It is a massive energy importer, not a producer in significant numbers.

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<v SPEAKER_2>So like other countries like Bangladesh and Indonesia and Malaysia, significantly impacted by the closure of the Strait of Hormuz.

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<v SPEAKER_2>So Pakistan really needs those trucks of oil that cross that border, even if it's technically not enough.

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<v SPEAKER_1>Team 212CD brings together Germany, Norway and Canada in a uniquely integrated submarine partnership, one that is already underway and already producing.

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<v SPEAKER_1>At its core stands TKMS, the world's most experienced builder of conventional submarines, offering Canada a low-risk, NATO-aligned, and economically transformative solution.

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<v SPEAKER_1>This is not a paper concept, this is a proven program, a live production line, and a generational opportunity for Canada's economy and sovereignty.

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<v SPEAKER_1>Western Allies, world-class platform, generational benefits, Team 212 CD for Canada.

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<v SPEAKER_1>Then in terms of the state security apparatus, so you touched on the repressive capacities basically largely unaffected.

00:14:29.340 --> 00:14:32.380

<v SPEAKER_1>What's your assessment of the state of the regime?

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<v SPEAKER_1>Maybe you can break it under a couple of chunks.

00:14:34.980 --> 00:14:38.980

<v SPEAKER_1>Their nuclear capability, their nuclear program, what's the net change there?

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<v SPEAKER_1>Maybe we'll start with there.

00:14:40.000 --> 00:14:51.180

<v SPEAKER_1>What went from in terms of rhetoric from the White House,

the program was, I can't remember the exact language, but completely shut down 10 months ago, but now there was reason to go back and go back.

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<v SPEAKER_1>How would you assess where the Iranian nuclear program sits?

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<v SPEAKER_2>Again, a word of caution and humility in the sense that, especially in terms of publicly available information, we're missing significant elements of the bigger picture.

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<v SPEAKER_2>So there's that element.

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<v SPEAKER_2>June 2025, 12-day war, Israel attacks, the US joins in for strikes in particular on three Iranian nuclear sites.

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<v SPEAKER_2>After the war, Trump says that the Iranian nuclear program was obliterated, which is one of the many fancy words that he used.

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<v SPEAKER_2>Clearly, that was not true.

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<v SPEAKER_2>In fact, the Defense Intelligence Agency itself publicly said, not long after the war, that it didn't openly contradict Trump, but its assessment said that that was not the case.

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<v SPEAKER_2>If you add up June 2025 with these strikes, with some strikes in the early 2026 war, the nuclear program has suffered severe setbacks.

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<v SPEAKER_2>A lot of the infrastructure was damaged.

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<v SPEAKER_2>A lot of the chain was also damaged, in the sense that a lot of the sites that produce elements for the nuclear program were also damaged, in addition to the sites themselves.

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<v SPEAKER_1>Not just the headline ones?

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<v SPEAKER_2>Not just the headline ones.

00:16:01.060 --> 00:16:08.840

<v SPEAKER_2>Same goes for the missiles, by the way, where a lot of the missile production sites, where there's a lot of specific chokeholds in terms of producing specific parts of missiles were also destroyed.

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<v SPEAKER_2>What is interesting is that after June 2025, when the Iranian nuclear program was badly damaged, not obliterated, but badly damaged, as were many other military sites, including missile sites and air defences, from what we could see in open sources, after June 2025, Iranian efforts went far more to rebuild capacity on the missile side and on the air defense side, much less on the nuclear program side.

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<v SPEAKER_2>Because that's more complicated and because in the short term, it's not the nuclear program, as long as you don't have a bomb, which Iran does not have, that will defend you against future attacks.

00:16:42.640 --> 00:17:03.280

<v SPEAKER_2>Now assuming that we'll see what happens, the war might well start again, but my expectation is that in the short to midterm, for the rest of 2026, the priority of the Islamic Republic will again be rebuild your missile capacity, rebuild your drone capacity, rebuild your air defenses, which were completely shattered, almost completely shattered.

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<v SPEAKER_2>The nuclear program will take a bit of a backseat.

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<v SPEAKER_2>I think that shows its priorities in terms of assuring its defense, but it also means something in terms of eventual negotiations in the sense that I tend to be fairly pessimistic that there is scope for an agreement, a sustainable agreement between the US and Iran, because a lot of the US requests on missiles, on Iran's support for terrorist and violent groups in the region, on security guarantees, on the stability of the Persian Gulf and the opening of the Strait of Hormuz.

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<v SPEAKER_2>The distance between the two sides is huge.

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<v SPEAKER_2>On the nuclear program, in the best of cases, it's not going to be easy, but there is a clearer scope for agreement.

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<v SPEAKER_2>It was done 11 years ago at the time of the Joint Comprehensive Plan of Action, the JCPOA, the nuclear deal of 2015-16.

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<v SPEAKER_2>There is scope for Iran to make concessions.

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<v SPEAKER_2>We are going to stop enrichment for X number of years, and after that, we will limit enrichment to lower levels, arguably 3.6%, 3.67%.

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<v SPEAKER_2>We will dismantle this facility, not that one.

00:18:06.200 --> 00:18:06.900

<v SPEAKER_2>We will do this.

00:18:06.900 --> 00:18:07.640

<v SPEAKER_2>You can monitor.

00:18:07.640 --> 00:18:08.980

<v SPEAKER_2>The IAEA can come in.

00:18:09.280 --> 00:18:12.860

<v SPEAKER_2>There is scope for agreement at that level, and Iran is willing to make some concessions.

00:18:13.000 --> 00:18:21.000

<v SPEAKER_2>On the missile program, Iran is not willing to make more than token concessions, as it is on support, for example, for Hezbollah or the Houthis.

00:18:21.600 --> 00:18:26.740

<v SPEAKER_1>Well, come to the conventional capability, the missile programs, drone programs in a second.

00:18:26.840 --> 00:18:32.240

<v SPEAKER_1>Before then, what's the state of the Iranian wider proxy network, support for terrorist organizations?

00:18:32.300 --> 00:18:35.700

<v SPEAKER_1>How would you characterize where all of that sits as of early May 2026?

00:18:36.180 --> 00:18:37.560

<v SPEAKER_2>That is a really interesting question.

00:18:37.560 --> 00:18:47.080

<v SPEAKER_2>I think one of the takeaways of this war is that a major

plank of Iran's doctrine or its deterrence posture has failed.

00:18:47.560 --> 00:18:53.520

<v SPEAKER_2>If you go back a few years, what was the point of Hezbollah and Hamas and other groups?

00:18:54.000 --> 00:19:02.060

<v SPEAKER_2>Yes, the point was project Iranian influence in the Palestinian territories, in Lebanon, in Iraq, in Yemen, in Syria before the Assad regime fell.

00:19:02.300 --> 00:19:03.140

<v SPEAKER_2>That's all true.

00:19:03.460 --> 00:19:07.080

<v SPEAKER_2>But another part, arguably the most important, was deterrence.

00:19:07.080 --> 00:19:15.980

<v SPEAKER_2>It was the signal to the US and Israel, you attack us directly, our proxies, our non-state armed partners will strike back.

00:19:16.120 --> 00:19:29.540

<v SPEAKER_2>So yes, you will have the ability to hurt us, we will have the ability to hurt you, and that established a fragile, but some deterrence in the region, and there was no direct war between the US slash Israel and Iran until 2024.

00:19:30.140 --> 00:19:31.280

<v SPEAKER_2>Never happened until then.

00:19:32.420 --> 00:19:47.560

<v SPEAKER_2>That failed in the sense that the US and Israel attacked Iran including on a very large scale, smaller scale in 2024, bigger scale in 2025, very large scale in 2026, and the Axis of Resistance, so Hamas, Hezbollah, and all of these groups, failed to deter that attack.

00:19:48.580 --> 00:19:55.760

<v SPEAKER_2>So the lesson of the last two and something months now is that Iranian deterrence doesn't come from Hamas and Hezbollah.

00:19:56.360 --> 00:20:07.960

<v SPEAKER_2>It comes from its ability to close the Strait of Hormuz, and to a lesser extent, it comes from its ability with its missiles and drones to hit at the UAE, to hit at Qatar, to hit at Saudi Arabia, and other neighboring states to a lesser degree.

00:20:08.820 --> 00:20:10.580

<v SPEAKER_2>But it's not Hamas and Hezbollah.

00:20:10.840 --> 00:20:12.760

<v SPEAKER_2> Hamas has been seriously weakened.

00:20:12.760 --> 00:20:13.600

<v SPEAKER_2> It's not dead.

00:20:13.600 --> 00:20:17.980

<v SPEAKER_2> It's still there, but it's seriously weakened and doesn't pose a threat to Israel the way that it did before.

00:20:18.200 --> 00:20:31.180

<v SPEAKER_2> Hezbollah is also weakened, not as much as Hamas, but somewhat seriously weakened, but clearly not able to threaten Israel enough to deter it from attacking Iran or Lebanon.

00:20:31.180 --> 00:20:32.800

<v SPEAKER_2> The one exception is the Houthis.

00:20:33.400 --> 00:20:36.200

<v SPEAKER_2> They are actually stronger today than they were three years ago.

00:20:36.560 --> 00:20:38.180

<v SPEAKER_2> Not the case for Hamas or Hezbollah.

00:20:39.100 --> 00:20:40.920

<v SPEAKER_2> But the Houthis are 2,000 kilometers away.

00:20:41.640 --> 00:20:53.400

<v SPEAKER_2> So their ability to hit Israel is actually quite limited, and when the war started on February 28th, Yemen watchers like me, the first question we were asking or one of the first questions was, when will the Houthis join in?

00:20:53.520 --> 00:20:54.380

<v SPEAKER_2> They didn't.

00:20:54.620 --> 00:21:00.680

<v SPEAKER_2> A few weeks later, they sent one or two missiles on Israel, which caused absolutely no damage.

00:21:01.460 --> 00:21:06.900

<v SPEAKER_2> So their ability to threaten Israel and deter attacks on Iran is close to zero.

00:21:07.100 --> 00:21:11.880

<v SPEAKER_2> Where the Houthis do have a major potential influence is in closing again the Red Sea.

00:21:12.620 --> 00:21:14.900

<v SPEAKER_2>And here, that's the really scary part.

00:21:15.700 --> 00:21:19.960

<v SPEAKER_2>We are collectively suffering the economic costs of the closure of the Strait of Hormuz.

00:21:20.240 --> 00:21:24.420

<v SPEAKER_2>Imagine if tomorrow morning, in addition, the Houthis also close the Red Sea.

00:21:24.640 --> 00:21:28.740

<v SPEAKER_2>The economic impact globally is just magnified if that happens.

00:21:28.740 --> 00:21:39.260

<v SPEAKER_2>So the mere threat of the combined closure of Hormuz and Bab al-Mandab, the southern tip of the Red Sea, together will stay with us for the foreseeable future.

00:21:39.260 --> 00:21:40.940

<v SPEAKER_2>And that's not a fun prospect.

00:21:41.580 --> 00:21:49.940

<v SPEAKER_1>Okay, so let's spend a couple of minutes talking about the state of the conventional armed forces of all flavours for Iran.

00:21:49.940 --> 00:21:53.380

<v SPEAKER_1>What's your state of exactly how significantly degraded they have been?

00:21:53.940 --> 00:21:56.340

<v SPEAKER_1>What did we learn in terms of what their capabilities were?

00:21:56.340 --> 00:22:05.680

<v SPEAKER_1>I was somewhat surprised about how the significant ability they did seem to have to get through a lot of the regional defences, including Washington Post had a story today.

00:22:05.680 --> 00:22:13.120

<v SPEAKER_1>I don't know if you saw it, but basically there was more damage to American installations in the region alone than had previously really been acknowledged.

00:22:13.560 --> 00:22:14.860

<v SPEAKER_1>What's your take on all of that?

00:22:14.960 --> 00:22:23.320

<v SPEAKER_2>Well, first of all, on that specific story, and there's

been a couple of stories like that coming out in recent days and I assume more will come out as more information filters.

00:22:24.940 --> 00:22:28.100

<v SPEAKER_2>To me, that matters, but only in a tactical way.

00:22:28.680 --> 00:22:31.440

<v SPEAKER_2>One way to think about the war is the balance of pain.

00:22:31.440 --> 00:22:36.320

<v SPEAKER_2>Iran suffered immeasurably, exponentially more than the US and Israel.

00:22:37.200 --> 00:22:48.040

<v SPEAKER_2>And the fact that Iran was able to penetrate air defences of American military installations in the Middle East a bit more than we thought, doesn't fundamentally change that huge imbalance between the two sides.

00:22:48.900 --> 00:22:51.180

<v SPEAKER_2>The question though is, how does it matter?

00:22:51.180 --> 00:22:55.060

<v SPEAKER_2>And this is where the simple numbers really don't tell the whole story.

00:22:55.360 --> 00:22:58.720

<v SPEAKER_2>The US was able to sink most of Iran's conventional Navy.

00:22:59.060 --> 00:23:00.580

<v SPEAKER_2>Trump keeps on repeating that.

00:23:00.680 --> 00:23:06.700

<v SPEAKER_2>But Iran's Navy never mattered in terms of its ability to inflict pain on the region, the global economy.

00:23:06.920 --> 00:23:10.420

<v SPEAKER_2>Iran had a handful of old ships, some of them from the 60s and 70s.

00:23:10.600 --> 00:23:11.820

<v SPEAKER_2>Same thing with its air force.

00:23:12.000 --> 00:23:15.280

<v SPEAKER_2>Its air force never mattered in terms of its ability to project power.

00:23:16.240 --> 00:23:23.520

<v SPEAKER_2>So it's not to say that it's irrelevant that these assets were either completely or to a significant extent destroyed.

00:23:23.840 --> 00:23:26.940

<v SPEAKER_2>But it's not where Iran has the ability to hurt others.

00:23:27.120 --> 00:23:29.400

<v SPEAKER_2>That really comes from its missile and drone program.

00:23:30.360 --> 00:23:38.880

<v SPEAKER_2>Its missile and drone programs were built, designed, organized for the eventuality of a war exactly of the type that happened.

00:23:38.880 --> 00:23:43.280

<v SPEAKER_2>From Iran's perspective, it worked in the sense that I don't know the numbers.

00:23:43.280 --> 00:23:47.160

<v SPEAKER_2>Is it 40, 50, 60 percent of its capacity that was destroyed?

00:23:47.320 --> 00:23:50.260

<v SPEAKER_2>A, we don't know, and B, it depends how you define capacity.

00:23:50.260 --> 00:23:54.900

<v SPEAKER_2>Do you include just the number of missiles themselves or the whole production chain that comes before it?

00:23:55.280 --> 00:23:57.900

<v SPEAKER_2>What matters is that a significant chunk was destroyed.

00:23:59.180 --> 00:24:07.180

<v SPEAKER_2>But from Iran's perspective, to block the Strait of Hormuz, you just need a fraction of that capability and you're still able to do it.

00:24:07.540 --> 00:24:09.400

<v SPEAKER_2>And because Iran's military...

00:24:09.400 --> 00:24:10.540

<v SPEAKER_1>A small fraction of that.

00:24:10.560 --> 00:24:11.920

<v SPEAKER_2>A small fraction, of course.

00:24:12.640 --> 00:24:28.860

<v SPEAKER_2>And because Iran's military infrastructure, including its command and control, is so decentralized, is so disseminated throughout the country, that bombing larger military bases, headquarters, missile and drone production factories and so on hurt.

00:24:28.860 --> 00:24:30.340
<v SPEAKER_2>And it absolutely did hurt.

00:24:31.040 --> 00:24:40.420
<v SPEAKER_2>And it constrains Iran's future power projection capability, but it was far from enough, and like far from enough to get Iran to stop doing what it did in the Strait of Hormuz.

00:24:41.240 --> 00:24:48.140
<v SPEAKER_1>So you talked earlier about a key Iranian lesson being that their real deterrent effect was related to the Straits.

00:24:48.620 --> 00:25:04.660
<v SPEAKER_1>What's your sense of how much of a deterrent they still retain at this point, just in terms of their ability to really restrict, or at least threaten to restrict or always moving forward, have an ability to impede the prior rate of commerce through the Straits of Hormuz?

00:25:04.840 --> 00:25:06.920
<v SPEAKER_2>I think they fully retain the ability to do that.

00:25:06.920 --> 00:25:17.740
<v SPEAKER_2>If you think in terms of outcome, as opposed to thinking in terms of numbers of missiles and drones that remain, we don't know that number, we know that it's dropped, but what remains is more than enough to achieve that outcome.

00:25:18.040 --> 00:25:23.440
<v SPEAKER_2>I think what matters here, and at some point as the dust settles, we have to think a bit in the longer term.

00:25:23.760 --> 00:25:31.260
<v SPEAKER_2>Yes, there's a crisis to manage in the short term, but in the longer term, Iran indefinitely has the ability to close the Strait of Hormuz.

00:25:31.560 --> 00:25:36.620
<v SPEAKER_2>We knew that before, we knew that in theory, now we know it in practice.

00:25:36.620 --> 00:25:47.500
<v SPEAKER_2>The precedent has been set, and that provides Iran with a tremendous degree of leverage that it will indefinitely have for the foreseeable future, and it's completely different.

00:25:47.980 --> 00:25:52.160
<v SPEAKER_2>In theory, we knew that Iran could do that in the past, but people were sceptical.

00:25:52.160 --> 00:25:53.260
<v SPEAKER_2>Would it actually do it?

00:25:53.260 --> 00:25:54.160
<v SPEAKER_2>It wasn't clear.

00:25:54.420 --> 00:26:08.200
<v SPEAKER_2>Now, we know the example has been set, and I think here, the important thing to keep in mind, and war games and simulations were done for decades, and I was involved in some over the years, and I read about many others.

00:26:09.040 --> 00:26:14.060
<v SPEAKER_2>Once the survival of the Islamic Republic was at stake, it would use everything it had.

00:26:14.440 --> 00:26:18.220
<v SPEAKER_2>As long as its survival was not at stake, which it was not until this war.

00:26:19.180 --> 00:26:21.240
<v SPEAKER_2>These were not wars for regime change.

00:26:21.240 --> 00:26:36.580
<v SPEAKER_2>It kept that in reserve because it was fearful of the consequences, because a blockade hurts its own export capacity, as we talked about a few minutes ago as well, because it hurts neighboring states, because it hurts its consumers, including China and others in Asia.

00:26:36.820 --> 00:26:38.460
<v SPEAKER_2>Iran was always reluctant to do that.

00:26:38.460 --> 00:26:49.760
<v SPEAKER_2>As soon as the US and Israel started bombing with all they had, and the objective for all of the contradictions, for all of the incoherent statements coming from the American side, regime change was on the table.

00:26:49.840 --> 00:26:51.520
<v SPEAKER_2>It was being openly discussed.

00:26:51.600 --> 00:27:01.240
<v SPEAKER_2>Then it was, to me and to most objective Iran watchers, 100% certainty that Iran would do this and that it would be more or less able to do it.

00:27:01.240 --> 00:27:06.600
<v SPEAKER_2>And now the precedent has been set, and that's the new

equilibrium we have to live with.

00:27:07.660 --> 00:27:10.880

<v SPEAKER_1>This episode of Defence Deconstructed is brought to you by Irving Shipbuilding.

00:27:11.040 --> 00:27:13.300

<v SPEAKER_1>Canada's national shipbuilder is currently hiring.

00:27:13.560 --> 00:27:18.620

<v SPEAKER_1>For more information on the many jobs and opportunities currently available, please visit www.shipsforcanada.ca.

00:27:24.020 --> 00:27:34.120

<v SPEAKER_1>And just thinking about that equilibrium, realizing that there's a whole bunch of these things in flux, and it seems to be some uncertainty about exactly what, you know, who is in charge to what degree of the Iranian regime.

00:27:34.760 --> 00:27:51.320

<v SPEAKER_1>But do you imagine that going back to a scenario where the straits become a deterrent to be broken only in case of regime survival explicitly, or now that that threshold has been crossed, does it lower the bar for Iran to use that as leverage in any kind of wider negotiation?

00:27:51.560 --> 00:27:53.120

<v SPEAKER_2>I think much closer to option too.

00:27:53.800 --> 00:27:55.980

<v SPEAKER_2>And in the sense that it's not a yes or no, right?

00:27:55.980 --> 00:28:01.320

<v SPEAKER_2>It's not just moving forward once the dust has settled out, whether it's days or weeks or maybe months.

00:28:02.220 --> 00:28:06.860

<v SPEAKER_2>It won't be in the future just an issue of will Iran close the Strait of Hormuz or not.

00:28:07.160 --> 00:28:21.700

<v SPEAKER_2>If there's one thing that we've learned over the decades with the Islamic Republic is that it can be very skillful, it makes mistakes, it overreaches all the time, but it can be very skillful at calibrating its provocations, calibrating the use of the various tools in its portfolio.

00:28:22.280 --> 00:28:46.260

<v SPEAKER_2>Now that is the number one tool in its portfolio of inflicting pain or threaten to inflict pain on others, but it will be

able in the future to modulate its use of that threat without necessarily fully closing the Strait of Hormuz, suggesting it might, having an obscure parliamentarian threaten to do it, and then people will wonder what does that actually mean.

00:28:46.860 --> 00:28:55.640

<v SPEAKER_2>Some of its small ships, so not its big Navy ships, they've all been sunk, but some of its small ships just swarming and intimidating oil tankers in the Gulf, right?

00:28:55.640 --> 00:29:06.220

<v SPEAKER_2>So there's all of these small tools that it will be able to use in the future to put pressure, whether in the context of other negotiations with the US, whether to put pressure on Saudi Arabia or for whatever other context.

00:29:06.220 --> 00:29:14.040

<v SPEAKER_2>So there's all of these multiple shades of gray between blockade and not blockade that will be very difficult to deal with.

00:29:15.180 --> 00:29:25.360

<v SPEAKER_1>In terms of dealing with it, if you zoom out a little bit, what's the implications for the wider region about everything that's transpired since the 28th of February?

00:29:25.520 --> 00:29:29.860

<v SPEAKER_1>Where does that leave relations between Iran and its neighbors, the various Gulf countries?

00:29:29.920 --> 00:29:31.740

<v SPEAKER_1>What do you think that wider picture looks like?

00:29:31.740 --> 00:29:40.880

<v SPEAKER_2>Well, for the Gulf countries, this is really difficult and it's stating the obvious to say that, but they have been put in a really uncomfortable position.

00:29:40.880 --> 00:29:50.320

<v SPEAKER_2>Here I mean the six Arab states of the southern shore of the Persian Gulf, Saudi Arabia, UAE, Bahrain, Qatar, Kuwait, Oman, they are not the same.

00:29:50.320 --> 00:29:54.620

<v SPEAKER_2>Their views on the war, on where to go moving forward are very different.

00:29:54.640 --> 00:29:59.740

<v SPEAKER_2>It's a heterogeneous block, always important to keep in mind, so I'm careful not to generalize here.

00:30:00.380 --> 00:30:02.420

<v SPEAKER_2>This is largely not a war they wanted.

00:30:02.560 --> 00:30:04.900

<v SPEAKER_2>This is largely a war they warned against.

00:30:04.900 --> 00:30:09.500

<v SPEAKER_2>There were conflicting reports when the war started as to what exactly their position was.

00:30:09.640 --> 00:30:17.100

<v SPEAKER_2>There were some media reports contradicted by others, that especially Saudi Arabia and the UAE were urging Trump to quote unquote finish the job.

00:30:17.500 --> 00:30:19.480

<v SPEAKER_2>I'm a bit skeptical of these reports.

00:30:19.940 --> 00:30:24.300

<v SPEAKER_2>I think to varying degrees, Gulf states have a clear interest in weaker Iran.

00:30:24.540 --> 00:30:28.000

<v SPEAKER_2>They all see Iran as a major threat, as the major threat.

00:30:29.200 --> 00:30:40.900

<v SPEAKER_2>But they understand better than anybody else, what instability in Iran means, because they're at the front lines in a way that obviously the US is not, but even Israel is not more than 1,000 kilometers away.

00:30:41.360 --> 00:30:54.160

<v SPEAKER_2>They understand that a prolonged war not only would lead to the type of scenario that we deal with now, which is hurting them to a huge extent, but they also understand what finish the job actually means in the real world, not in the fantasy world of social media.

00:30:54.680 --> 00:30:58.600

<v SPEAKER_2>Finish the job means bombing Iran to the point of getting the regime to fall.

00:30:59.160 --> 00:31:10.400

<v SPEAKER_2>A, as we were talking about a few minutes ago, the resilience of the regime, which they understand, would have meant a months long bombing campaign with a very uncertain outcome, and they would have had to deal with the consequences.

00:31:10.660 --> 00:31:17.040

<v SPEAKER_2>B, there's the issue of what comes next, which was never

addressed in any intelligent manner by the US.

00:31:17.500 --> 00:31:25.420

<v SPEAKER_2>If we had been in a scenario where the Islamic Republic had fallen as a result of the war, or if it happens farther down the road, what comes next?

00:31:25.660 --> 00:31:28.020

<v SPEAKER_2>There is no alternative to the Islamic Republic.

00:31:28.020 --> 00:31:31.840

<v SPEAKER_2>There's no opposition ready to take over, democratic or non-democratic.

00:31:31.960 --> 00:31:39.680

<v SPEAKER_2>So what comes after the Islamic Republic if the whole thing falls apart, not just parts of the regime and a military takeover is complete chaos.

00:31:39.720 --> 00:32:00.840

<v SPEAKER_2>It's fragmentation, it's civil war, whether you want to call it the Libya or Syria or Iraq or whatever scenario, it's brutally unstable scenarios for the long term in a country that is awash with weapons and that is next to the, as we now clearly know, most important shipping lane for energy in the world, right next door, literally dozens of kilometers away from these six states.

00:32:00.840 --> 00:32:04.820

<v SPEAKER_2>So all that to say, they get it, better than anybody else, what happens?

00:32:04.820 --> 00:32:10.640

<v SPEAKER_2>So from their perspective, in many ways, the ideal is a weaker but shackled Iran or contained Iran.

00:32:10.920 --> 00:32:19.680

<v SPEAKER_2>Right now, for them, this is a nightmare scenario because it's a weaker Iran but a nastier Iran, a more aggressive Iran and they suffer the consequences from that.

00:32:19.680 --> 00:32:24.840

<v SPEAKER_2>So they will remain extremely bitter at Iran because they were bombed.

00:32:24.840 --> 00:32:29.680

<v SPEAKER_2>The UAE had close to 3,000 missiles and drones, which is an insane number.

00:32:30.340 --> 00:32:37.560

<v SPEAKER_2>But at the same time, they know better than anybody else

that they need to co-exist with Iran, with the Islamic Republic, in a way that others don't have to.

00:32:38.380 --> 00:32:47.360

<v SPEAKER_2>What this will mean is that as much as their resentment at the US for not having consulted them before and during the war, they will have no choice but to remain close to the US.

00:32:47.360 --> 00:32:54.020

<v SPEAKER_2>They will continue to need to buy American weapons and benefit from the American security umbrella as imperfect as it was.

00:32:54.020 --> 00:32:57.520

<v SPEAKER_2>There is simply no alternative for them for the foreseeable future.

00:32:58.240 --> 00:33:02.020

<v SPEAKER_1>What about relations between Israel and the rest of the community and the United States?

00:33:02.020 --> 00:33:06.480

<v SPEAKER_1>I think in a lot of this conversation, you were skewed to talking about the White House and American actions.

00:33:06.780 --> 00:33:14.200

<v SPEAKER_1>There was early reporting about exactly what kind of the ratio between American and Israeli efforts either in planning, early parts of the campaign.

00:33:14.980 --> 00:33:16.520

<v SPEAKER_1>What's your sense of all of that?

00:33:16.740 --> 00:33:31.000

<v SPEAKER_2>Well, from the Israeli perspective, it was more transparently a war for regime change at the beginning, whereas on the American side, there was never from day one until now, there was never clarity, consistency and coherence of the objectives.

00:33:31.360 --> 00:33:40.280

<v SPEAKER_2>Is it about the nuclear program, the missile program, support for terrorism, regime change, is it about reopening the Strait of Hormuz, consistent and coherence.

00:33:40.280 --> 00:34:01.420

<v SPEAKER_2>On the Israeli side, in the first weeks, it was about regime change and what I just described three minutes ago, about the very difficult post-regime collapse scenarios, was not much of a concern for Israel, again, because of geography, because from 1500 kilometers away, these are consequences that Israel can deal with.

00:34:01.420 --> 00:34:03.940

<v SPEAKER_2>The Islamic Republic would be gone, that's good enough.

00:34:05.200 --> 00:34:22.280

<v SPEAKER_2>As it became clear as the war progressed that not only would the regime not fall, but that that was not the objective on the American side, Israel with a bit of a lag followed and was just talking about weakening the regime, hurting the regime and so on, which from Israel's perspective is second best.

00:34:22.840 --> 00:34:27.460

<v SPEAKER_2>There is a debate now as to the damage that this would cause to US-Israeli relations.

00:34:27.900 --> 00:34:52.020

<v SPEAKER_2>There are some people, including serious analysts, not just the more anti-Israel critics, who think that the damage to US-Israel relations could be significant in the long-term as the dust settles, and as on the American side there's a realization that this war did not succeed and ends up being very costly, not just economically, but geopolitically, that Israel could take the fall on relations between the two countries.

00:34:52.720 --> 00:34:54.680

<v SPEAKER_2>I tend to be skeptical that that is going to happen.

00:34:54.680 --> 00:35:00.280

<v SPEAKER_2>I think there's a bit of wishful thinking on the part of those who predict that irrespective of what I wish for.

00:35:00.280 --> 00:35:03.980

<v SPEAKER_2>I think realistically US-Israel relations will remain quite close.

00:35:04.260 --> 00:35:08.600

<v SPEAKER_2>If a Democrat comes to power in 2028, there will be a bit of tension.

00:35:08.680 --> 00:35:11.520

<v SPEAKER_2>There will arguably be more tension than we saw under Biden.

00:35:11.760 --> 00:35:29.160

<v SPEAKER_2>But relations remain between the two countries so deeply institutionalized at the bureaucratic level, at the level of Congress, at the political level, at other levels that I think it realistically, whether you agree with this or not, morally it will take much more to cause a bigger break between the two.

00:35:30.320 --> 00:35:35.520

<v SPEAKER_1>Lastly, what do you think that this means from as much as you can get this sense?

00:35:36.180 --> 00:35:48.220

<v SPEAKER_1>One of the reasons I mentioned having this conversation is that the current conflict not only has tangible impacts to Canadians, but that's been a theater from which the Canadian government's been involved to varying degrees off and on for a couple of decades now.

00:35:49.100 --> 00:35:54.360

<v SPEAKER_1>Where do you think that this leaves the future draw for Canadian involvement in the region?

00:35:54.460 --> 00:35:56.760

<v SPEAKER_1>I'm leery of saying, what does it mean for Canada?

00:35:56.760 --> 00:36:01.800

<v SPEAKER_1>I'm assuming your answer is going to be relatively consistent in some of your other past takes has been not much.

00:36:01.800 --> 00:36:09.640

<v SPEAKER_1>We don't have a huge influence here, but what do you think it suggests in terms of how the Middle East factors in Canadian international policy thinking?

00:36:09.640 --> 00:36:12.100

<v SPEAKER_2>Well, I think there's a few different things to say at that level.

00:36:12.100 --> 00:36:22.640

<v SPEAKER_2>I think first of all, one thing that has been emerging under Prime Minister Carney for about a year now, is that the Gulf matters much more than under Prime Minister Trudeau.

00:36:22.740 --> 00:36:28.660

<v SPEAKER_2>In a way, going back to the Harper years, especially the last four Harper years when the Gulf was a priority.

00:36:28.840 --> 00:36:32.020

<v SPEAKER_2>By the Gulf, I mean the Arab states of the southern shore of the Persian Gulf.

00:36:33.560 --> 00:36:35.500

<v SPEAKER_2>Carney went to the UAE, he went to Qatar.

00:36:35.500 --> 00:36:37.520

<v SPEAKER_2>There have been several ministerial visits.

00:36:37.520 --> 00:36:40.040

<v SPEAKER_2>There have been several visits there, but also here.

00:36:42.060 --> 00:36:47.200

<v SPEAKER_2>So I think he clearly showed that he wants Canada to deepen relations with the region.

00:36:47.540 --> 00:36:53.020

<v SPEAKER_2>Right now, like I said a few minutes ago, Gulf states will have no choice but to remain very close to the US.

00:36:53.020 --> 00:36:55.240

<v SPEAKER_2>They will remain under the US security umbrella.

00:36:55.420 --> 00:37:04.700

<v SPEAKER_2>But under that umbrella, a trend that we were already seeing before 2026 will intensify, which is them trying to diversify, hedge under the American umbrella.

00:37:04.700 --> 00:37:06.100

<v SPEAKER_2>Nobody will replace the US.

00:37:06.300 --> 00:37:16.080

<v SPEAKER_2>During the war, we saw the UK, France, and Italy actively supporting Qatar in particular, UAE as well in counter drone and anti-missile defenses.

00:37:16.940 --> 00:37:20.280

<v SPEAKER_2>This is something that Gulf states very much appreciated and wanted more of.

00:37:20.360 --> 00:37:24.420

<v SPEAKER_2>Actually, we're quite bitter that they didn't get more of it from multiple sources.

00:37:24.740 --> 00:37:30.740

<v SPEAKER_2>So moving forward, when Canada thinks about the Gulf states, there's a clear financial and economic dimension.

00:37:30.740 --> 00:37:34.840

<v SPEAKER_2>We want investment, we want cooperation at that level, which I think is the right way to go.

00:37:35.620 --> 00:37:39.580

<v SPEAKER_2>But at the same time, there is scope to deepen security cooperation with them as well.

00:37:39.780 --> 00:37:41.240

<v SPEAKER_2>Obviously, we're a small player.

00:37:41.240 --> 00:37:45.220

<v SPEAKER_2>We will never be not even at the level of the UK and France in the Gulf.

00:37:45.220 --> 00:37:48.180

<v SPEAKER_2>That's perfectly fine, but there is scope to do a bit more.

00:37:48.220 --> 00:38:02.920

<v SPEAKER_2>There is, as an aside, a major lesson that if we didn't learn it from the Ukraine War, we should learn here that counter drone and anti-missile technology, defenses, including on the cheaper side of the spectrum, is something we need to spend way more resources on.

00:38:02.920 --> 00:38:04.840

<v SPEAKER_2>But that's a separate debate.

00:38:06.160 --> 00:38:10.540

<v SPEAKER_2>The second point I'd make on implications for Canada is an eventual maritime mission in the Gulf.

00:38:11.080 --> 00:38:16.140

<v SPEAKER_2>Again, this week, there has been talk about France in particular, with the UK leading an eventual maritime mission.

00:38:16.480 --> 00:38:19.440

<v SPEAKER_2>I've been fairly skeptical of that mission since the beginning.

00:38:19.620 --> 00:38:23.860

<v SPEAKER_2>It could happen farther down the road if or when things really stabilize.

00:38:23.940 --> 00:38:34.820

<v SPEAKER_2>Nobody, and I include the French and the Brits and the Canadians and anybody else, nobody will contribute to a mission as long as there's a risk of Iranian drones and missiles landing on your frigates or destroyers or anything else.

00:38:35.740 --> 00:38:42.440

<v SPEAKER_2>Once that threat is over, then that mission becomes a reality, but then the question becomes, but if the threat is over, what's the point of the mission?

00:38:43.240 --> 00:38:50.000

<v SPEAKER_2>So I'm not sure where that goes because there's way too many questions to be definitive on that, but that is still something that Canada could do.

00:38:50.160 --> 00:39:02.640

<v SPEAKER_2>The last point I'll mention on implications for Canada,

and it's slightly distinct but still an important point to make, is transnational repression, a point that I've been trying to bang on when I had the opportunity to do that.

00:39:03.260 --> 00:39:13.100

<v SPEAKER_2>The Islamic Republic already meddles in Canadian affairs a lot, especially at the level of intimidating, targeting, pressuring, threatening Iranian-Canadian anti-regime dissidents.

00:39:13.220 --> 00:39:16.160

<v SPEAKER_2>That's already a significant problem in this country.

00:39:16.500 --> 00:39:23.360

<v SPEAKER_2>In the past, we have seen threats by the Islamic Republic inside our country intensify when two conditions were met.

00:39:23.500 --> 00:39:31.120

<v SPEAKER_2>A, the regime feels more vulnerable, geopolitically or domestically, which is entirely the case now, and B, there's enhanced diaspora mobilization.

00:39:31.400 --> 00:39:38.980

<v SPEAKER_2>We saw that after Women's Life Freedom in 22-23, and we saw that when PS752, the aircraft was shot down in early 2020.

00:39:39.620 --> 00:39:49.640

<v SPEAKER_2>We're basically at a point now in 2026 where you have enhanced diaspora mobilization against the regime because of the war, because of the protest earlier this year, and we have a regime that feels acutely vulnerable.

00:39:50.060 --> 00:40:00.940

<v SPEAKER_2>If you look at past patterns, to me that likely means that the baseline of already high transnational repression by Iran in our country will intensify in 2026.

00:40:00.960 --> 00:40:03.500

<v SPEAKER_2>I'm writing a book with a colleague on that right now.

00:40:03.500 --> 00:40:05.240

<v SPEAKER_2>We're focusing on the writing over the summer.

00:40:05.260 --> 00:40:13.360

<v SPEAKER_2>I've interviewed dozens of Iranian Canadians, and right now the feeling of terror and of fear is absolutely widespread in the community.

00:40:14.560 --> 00:40:20.260

<v SPEAKER_1>Well, a bit of a depressing note to end on, but thank you for joining us to share insight in the region.

00:40:20.380 --> 00:40:22.600

<v SPEAKER_1>Very last question to you, what are you reading?

00:40:23.880 --> 00:40:29.960

<v SPEAKER_2>Right now, I'm reading The Persian by David McCloskey, who is a former CIA analyst.

00:40:29.980 --> 00:40:31.700

<v SPEAKER_2>I think it's his fourth spy novel.

00:40:32.620 --> 00:40:36.680

<v SPEAKER_2>I've read the first three and I'm only a few dozen pages in the book.

00:40:36.680 --> 00:40:38.100

<v SPEAKER_2>I just started it a few days ago.

00:40:38.740 --> 00:40:43.920

<v SPEAKER_2>But it's another, it's an Israeli agent operating inside Iran who gets arrested.

00:40:43.920 --> 00:40:45.480

<v SPEAKER_2>And I'm not sure what happens after that.

00:40:45.660 --> 00:40:46.000

<v SPEAKER_1>Okay.

00:40:46.000 --> 00:40:48.420

<v SPEAKER_1>Well, Thomas, thanks again for joining us on Defence Deconstructed.

00:40:48.420 --> 00:40:48.900

<v SPEAKER_2>Thank you.

00:40:49.740 --> 00:40:51.720

<v SPEAKER_1>Thanks for listening to Defence Deconstructed.

00:40:51.940 --> 00:40:57.320

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00:40:57.400 --> 00:41:03.700

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00:41:04.000 --> 00:41:06.280

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00:41:06.620 --> 00:41:10.500

<v SPEAKER_1>Music credits go to Drew Phillips and this episode was produced by Jordyn Carroll.