



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

DUBOWITZ: Welcome back to *The Iran Breakdown*. I'm Mark Dubowitz. If you're trying to understand this war through the lens of the 2003 invasion of Iraq, you've probably already got it wrong and got the wrong map. There's no march on Tehran, no mass invasion, no plan to occupy a country of nearly 90 million people. That was never the strategy. What's happening instead is a sustained campaign to take apart Iran's nuclear and military systems piece by piece. Missiles, drones, naval assets, launchers, command networks, the nuclear program, and the internal machinery that lets the regime project force abroad and whole power at home. At the center of it all, a deliberate effort to severely degrade Iran's nuclear program and keep the regime from ever crossing the threshold to a bomb. And it's not just happening in the air. There is a battle for the Strait of Hormuz, where Iran is using its one real piece of real leverage: the threat of closing the world's most important oil choke point. While the US works to reopen it and restore freedom of navigation.

Running alongside of it is an economic war started by Tehran. Iranian attempts to punish global markets, answered by a U.S. Naval blockade of Iranian ports that's now costing a regime an estimate of \$435 million a day, or \$13 billion a month. This isn't a war for territory. It's a war to degrade capability, disrupt command, shut down the path to nuclear weapons, break the regime's economic backbone, and shrink its ability to threaten its neighbors, deter its enemies, and govern under pressure.

To walk through the military logic of that campaign, I'm joined by John Spencer. John is executive director of the Urban Warfare Institute. He's a former army officer, a combat veteran, and one of the most widely cited voices today on how modern wars are actually fought, how military systems break down, and help political goals shape what happens on the battlefield. He's advised commanders, briefed policymakers, studied everything from Mosul to Gaza City, and spent years on the ground with militaries on issues that matter most here.

What happens when wars stop being about taking ground and start being about dismantling an adversary's ability to fight, command, and politically survive? Because even without tanks rolling towards Tehran, this war has a logic. If you want to know what success looks like, escalation or failure, you have to understand that logic.

John, welcome.

SPENCER: Mark, it's a great honor to be with you, my friend. I'm just honored, to be frank.

DUBOWITZ: John, honored to have you. I mean, really, you have been one of the most consequential voices out there over many years, and not only consequential, but courageous, often running against the narrative. So that's always important in keeping your analytical honesty while I think too many around us are losing there. So, thank you.

SPENCER: Definitely. And I can't thank you enough for the great work that FDD does, and all the voices that I listen to: you, Jonathan Schanzer, Mark – Rich Goldberg, all of them. Just to stay informed on understanding the complexity of warfare, you have to know which experts to listen to.

DUBOWITZ: All right, John. So, I – obviously mutual admiration society, but let's jump in. I've been fascinated by your analysis, not only of the Iran war, but of many of the conflicts that have been faced in the United States and our allies. And you've used the phrase "neurological war." And I think it captures what a lot of people miss. What is a neurological campaign actually look like in practice? And how's this different from some of the things in military concepts that we grew up with? For example, like the U.S. concept of shock and awe?



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

SPENCER: I didn't create the terminology, of course. So, I'm a student of warfare across the ages, taught strategy at West Point, relying on a lot of old dead people. There is an element of what's called the neurological strike. So, I adapted, because too many people were, of course, all of the so-called experts – and I actually use a term called "experts" because of "ex." And in a snap of a finger, everybody's a strategist and an Iran expert or a war expert, but saying that a decapitation strikes don't work, right? That isn't what I observed on the opening of this operation. I hope we don't – maybe we can call it a 40-day war, but we are yet to see. But the opening of Operation Epic Fury and Roaring Lion involved a neurological strike, not just the decapitation with the death of the supreme leader, but every element in attacking across really every ability for the enemy, politically and military, to have a cohesive command and control, cohesive thought.

And that's their neurological strike, rather than just chopping off the head. You're severing the spinal cord and starting to attack every bit. And that's what you saw in the first opening hours, and really important, because it really gets to, of course, if we talk about the science of war, theories of victory and some of the things we'll talk about, they are resting on a foundation of people like Sun Tzu, Clausewitz, Machiavelli, Thucydides. None of those people could have imagined the capability of what was done at the opening of this. So really for me as an analyst, gets to people saying, "Well, history shows you can't – this won't work." Well, let's acknowledge what just happened: this neurological strike and what we're going to talk about, which is the attacking of every center of gravity of the Islamic regime in Iran's ability to wage war. The opening strike severed that capability by not just killing the ayatollah, his key advisor, the minister of defense, the head of the IRGC, many subordinate leaders across Iran, all simultaneously.

None of the great military theorists of time could have even imagined it. And if you look at their theories about attacking leadership, attacking an army, attacking their means. Even [John A.] Warden, who is kind of an air power theory, who kind of said attack at that center first. Nobody could have imagined, because nobody's ever had this capability. And unique with Israel's intelligence penetration, precision guided munitions, bunker busting munitions, and two of the greatest Air Forces in the world combining and synchronizing their efforts to open a war, which is a contest of will, to immediately paralyze the other side is this neurological warfare that I talked about. And I wrote an article about it. It's a unique capability, clearly, that the United States and Israel were able to put together, and no other country – and I'll say this very frankly – I don't think any other country in the world has a capability to open a war like that.

DUBOWITZ: You know, John, when I think about this Iran war, I think about it in a sort of broader context, because here at FDD, obviously, we're keenly interested in this axis of aggressors, where you have Iran, China, Russia, North Korea, and radical Islamists who are working very closely together against beleaguered democracies. The United States, hopefully, we're the kind of arsenal of democracy, but then there's these beleaguered democracies: Israel, Ukraine, Taiwan, Japan, the Baltics, Poland. I mean, these other countries that are under threat from American enemies. And as I think about what has been demonstrated in this war, I'm constantly pushing myself to think: has this been a war that has demonstrated the kind of lethality that the United States is capable of, but also the kind of coordination that we can have with allies? Is it possible to have this level of coordination, for example, with the Ukrainians, or with some of our NATO allies?

Is it possible to have this kind of coordination with the Japanese, the South Koreans, the Australians, and some of our Indo-Pacific allies? Or is this really unique, what you've seen between the United States and Israel?



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

SPENCER: So, understanding all the warfighting capabilities, I mean, there are allies, of course, that have Air Forces, but like the president and Secretary of War Hegseth, said: willing is one thing, capable is the other. We'd have to go down each one of those scenarios just from a forced projection perspective. Of course, the United States is the only one that can project power globally, then have an ally like Israel show parity. And the parity isn't just in what their Air Forces can do, the munitions that they have, but also that intelligence apparatus. So, I couldn't think of anybody. No, Ukraine couldn't – while Ukraine is doing unimaginable things defending against the Russian aggression across a geographic front that is surpassing most people's ability to imagine the sheer geography of it, and what they're doing in adapting innovation, drone, robotics is phenomenal. But I can't think of any other ally who has that sole capability to join and provide such parity.

I also tamper that with context, context, context, depending on geography, how far are they projecting power. And is it for Israel? That's another – and I wrote this article about the strength of Israel right now from a military perspective, doing what most even Israelis wouldn't even think possible. Not only the sustained air campaign with its own refuelers, intelligence, creating their own air superiority like they did in the 12-Day War, but reaching Yemen and these aspects of being able to project power, depending on what country you're talking about, that doesn't have that capability, and it would be challenged depending on the scenario. But there are a lot of allies. I mean, this is the Churchill, right? "The only thing worse than fighting with allies is fighting without them." So, I want these allies to be capable and then willing. And we've seen war puts everything to the test, Mark, and that's what we've seen.

And of course, we talk about war fighting capabilities, we've talked tactics, but it puts everything to the test, and allies, and their internal political situation. What's been done to the British Army, the British Navy. I mean, that's just a sad story of an evolution of a society making trade-offs on its own defense. But I can't think of anybody else at this moment, Mark, that could join in this scale of an operation with this level of dominance, to be very frank, as well.

DUBOWITZ: So, John, I want to talk about breaking the Islamic Republic's war-making machine, because certainly, I think President Trump has defined it, I think, pretty clearly. I mean, he's not a disciplined speaker, and he sometimes goes off on rhetorical flights with reporters. But I think from February 28th, when he announced this war, and the kind of constant stream of press communications from the White House, I think the objective of this war has been to break their war-making capability, and to prevent Iran from ever building a nuclear weapon. Let's talk a little bit about that, what it practically means to dismantle a military system, rather than just defeated army. And I'd ask you this question: if you had to identify the single most important target that's been hit in the campaign – not the biggest, but the single most important – what is it, and why?

SPENCER: So, you're going to take me back to teaching strategy, or even my own officer days of doing what we call center of gravity analysis. So, what is the sole source of power that we – so, it's a paradigm we got from Clausewitz on war, that probably one of the most quoted, but at least read publications in the strategy world, because it's so thick. So, in order to be able to wage war – a nation's ability to wage war is a combination of its means and its will. In the opening shot, the United States and Israel took attack the systems which support both the means and the will. In order to project power outwards, it needs two things: missile launchers and air defense capabilities. And the attack, overwhelming attack – I would say, if you press me, Mark, it's the ability to protect power outwards, and that is those missile launchers, but also their defense of capability, which is its own story.



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

So, the air superiority that the United States and Israel has created in the opening hours is also historic. And despite the two down, if you want to count hit by enemy fire, it's still historic against a nation of this size to create that air superiority. You said one thing, missile launchers. If I was answering the test, I would also put the leadership. Imagine killing Hitler and his successor, killing every element of the Nazi regime hierarchy, both political and military, in the opening shout of the war – can never be imagined. So, it would be tough for me, Mark, to say killing the leadership, all of it, to create them to really struggle to have a cohesive response. And the means, the launchers, are really critical in that.

DUBOWITZ: Yeah. I mean, there's often this debate, I think, in military circles, but I think it applies in business just as well, which is this idea that if you lose your management structure, there'll always be someone to replace them. And then if you lose that, there'll always be someone to replace them. Well, I've never commanded a military, but I am CEO of FDD...

(LAUGHTER)

DUBOWITZ: ...and even at our small organization of a hundred plus people, you know that there are A players and B players and C players. And if you lose your A players, that's a real blow. I mean, maybe the B players can step in and become A players, but that's a lot more difficult. And I imagine for the regime in Iran, you take Khamenei and [Ali] Larijani and [Hossein] Salami, and the members of the IRGC and Basij and Intelligence Services and Army, people who've got decades and decades of experience, and you eliminate them all.

Let's say in that opening like 40 seconds on February 28th, when in 40 seconds, 40 senior IRGC and military and political leaders were eliminated along with Khamenei. OK. Well, you can replace them, and then you eliminate those replacements, and you can replace them. But at some point, you're starting to really diminish the experience and qualifications and competence of who's taking over. And I think we just think these people are just easily replaced, but I think in war, as in business, as in life, that's not – that's not true.

SPENCER: No, and I think the history's being written. I think it's a great point. Again, I'm a realist, but I'm also just a straight critical thinker. And I hear all these people – these prophets – projecting failure, projecting the regime surviving, all of this. One, let's be truthful, like you said, go back to the February 28th speech of President Trump, that objectives listed, and then a conversation about IRGC giving up their arms, the people having a chance to take back their regime. But in this aspect of wars – and I get the whole “there's always somebody else to take their place.” But if you understand the objectives of the war, and really, and I hope we can do it, because I actually was a part of the invasion of Iraq in 2003 to overthrow the Baath regime, and I jumped into the north – the sheer difference between unlimited war with limited objectives, and an unlimited war with maximum objectives like regime change and taking the ground and ruling the population, versus a limited war.

And this is the crazy world we live in right now, where it's like it's the rooting for the United States and Israel to lose. They're making up objectives so they can say that you've already lost. And from this perspective of taking out the entire leadership, just when – even if you're an international relations student of understanding powers of a nation, and you, better than I, understand the different factions within the IRGC and the Islamic regime in Iran, you can't tell me that taking out all this leadership doesn't severely expose fissures, in which you could have cataclysmic consequences. But everybody wants their 32nd clip today. They want to know what's happening today and calling falls and strikes of failure and victory today, and it's problematic.

DUBOWITZ: Yeah. I mean, I think it's interesting you use that analogy. At FDD, our motto is “we call balls and strikes regardless...”

SPENCER: Right.



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

DUBOWITZ: "... of the pitcher," meaning regardless of the president. And I think, unfortunately, Trump's Derangement Syndrome has diminished the analytical capabilities of many people out there. I think, unfortunately, there's just a lot of people out there for whom the Iran war is an opportunity to undermine the president and win politically, rather than being honest in the assessment. OK. I want to pivot to an area of specialty for you: urban warfare. And you had made a comment about that the goal of this campaign, at least expressed by the administration, by the president himself, was not regime change, was not materially providing support to the Iranians to come back to the streets and take back their country. It was aspirational. President Trump has talked about it, but there doesn't seem to have been one of the defying goals of the Trump administration. It's certainly a very much defined goal of FDD and this podcast, and maybe that's where we differ from the president, but we think ultimately that the only solution to all of this is for the United States and Israel to provide maximum support to the Iranian people to come back to the streets to take back their country.

And – but I want to ask you about if the regime falls, some of the darker scenarios that could occur, and a insurgency breaks out, and there's a big war between factions of the security state itself. And we are in an urban warfare environment in the streets of Tehran or in Iran's 20 major cities. What does that look like? Anyone planning for it? Is there any sense that in a post-collapse Iran, you could see the kind of brutal urban warfare that the United States was engaged in, in Iraq and Afghanistan, that the Israelis have been engaged in, in Gaza and in Lebanon? Because I think it's always important not to think about just the rosy scenario of a peaceful, stable, democratic post-Islamic Republic, but a Iran that has collapsed into factional warfare and an urban warfare.

SPENCER: Yeah. So, I know we don't have the time that it would take for me to spin up on that. It's a lot. Even my own podcast, I've spent six years digging into those, and I love doing case study methodology, especially when you talk urban centric aspects of whether it's the Battle of Kyiv, which was the center of gravity for the Russian invasion of Ukraine that failed, and they won that battle. And the strategic objectives for the entire war for Putin had to change because he lost that battle. Specific to Tehran, with a city of that scale, nine million in the core, you extended to the peripheries, you're getting over 16 million. You said if the regime falls and you have this contest for power; there is a nature. And when you have nodal cities of individual cities playing out in a different way, it does matter, like we've said in Gaza, if Hamas has the guns and they are the power in the areas that they are the power.

So, who has the guns? It doesn't mean that the IRGC and the Basij who have the guns today won't be the ones who have the guns tomorrow. There is an element of population mobilization, and this is what played out in January, which is very dangerous for the population. I – John Spencer's personal opinion: I am with you. I want to see the regime fall and the terror that it does to the population end, and of course, maximum support and maximum pressure. And I'm sure we can't talk about Operation Economic Fury, but those are all parts of that. There is absolutely a potential – and this is again why I don't do crystal balling – of contest of power. Even if we were to do the Iraq War, where we seize Baghdad with a single brigade, and Baghdad is being managed, but you have cities like Fallujah and Najaf, Ramadi, all turn into separate of the core power, and immense amount of violence happen after the war, essentially objectives are achieved and have transitioned.

And you got to give the United States and Israel credit for the constraint that they have had on targeting things in Tehran and other locations with 100 percent of precision-guided munitions because of the potential for catastrophe, for immense violence, of course. And this is the whole thing about arming ethnic minorities like the Kurds, which is all part of the maximum pressure campaign against the regime to do the behavior that isn't as likely a reality as that – not anarchy, but severe period of power or contest. That is absolutely a potential. You have experts that could go to even Iran, Persia's history of when that has happened and revolutions and things like that.



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

DUBOWITZ: Yeah. I mean, the interesting thing to me on the urban warfare side of this is it cuts both ways, right? On one hand, you could see urban warfare being waged against the regime by the Iranian people, but in these dense, highly populated cities like Tehran and others. And then you could see urban warfare in an insurgency context, where the remnants of the security services of the IGC and the Basij and the intelligence services come together and wage an urban war insurgency against a new Iranian leadership. And so it's kind of, again, it doesn't repeat, but it echoes, it reminds us of what happened in Iraq, where you had remnants of the Iraqi army and the political leadership who organized, and we faced a brutal insurgency that was supported by Iran, that was armed by Iran, but was fought by remnants of the Iraqi army and political leadership.

So, urban warfare would cut potentially both ways. We could use it to help bring down the regime, but we'd also have to face a urban insurgency being waged by remnants of the Iranian security state. I feel like not enough thinking has gone into that. Certainly, I hope that it has, and maybe I'm just not aware of that inside the U.S. military or inside the U.S. intelligence community, but it seems to be an area of study quite worthwhile, particularly if our end goal is to bring down this terrible regime.

SPENCER: Yeah. So, I didn't answer your question about do I think people are thinking about it? Of course, I think there are people that are thinking about it, but are they in the room part of the conversation? As I know, even FDD experts have been in some of those rooms, providing that expertise. One of the publications I use almost daily: Michael Howard's article, "The Use and Abuse or Misuse of Military History" [sic, "The Use and Abuse of Military History"]. So, Iraq, just from the – I was there when the greatest decision to lead to a path or failure of firing the entire Baath government, and anybody who associated with it, as well as the military, right? So, these are the depth of conversation and understanding what is the Iranian society, how many support the IRGC? What is the difference between Artesh and the IRGC? Where are the different powers that could be both the, as you said, cutting both way, even in the urban centers of how is power maintained?

So, I love studying even urban security. This is, again, going into what's been struck. Of these almost 20,000 things that have been struck during the 40-day war, as you and I were talking before we started, Basij checkpoints, Basij headquarters, intelligence centers, even internal police headquarters, which are all levers of even urban security. Because where do you protest? Where can you protest? And there are books, even during other situations like the Arab Spring, where can you lose power so quickly that you don't have the ability to maintain it? It is in the urban centers, of course. But it goes both ways. But as you saw Israel attacking every lever of the regime to maintain power, even in protests, which happen in the urban centers, you can see that it is gray. It isn't black and white. Yes, there's lots of potential for good and bad to happen in the urban centers.

I do know of some people, although actually I have a lot of job security as in those who study urban warfare, even in historical case studies, there are a few of them.

DUBOWITZ: I think I'm prone to this, and I think it's really useful to hear from you and for our viewers to hear from you. And what I am prone to sometimes is perhaps too much optimism. And I think that's just because I'm rooting for the United States of America, and I want it to win regardless who the president is. I always am rooting for America but also being honest analytically in what cards Iran has and the cards they can play. What is the kind of Iranian adaptation you're watching most closely? The moves that tells you that the regime has figured out how to live with this military and economic campaign, rather than break under it, the kind of regime's best card, right? Which I think is more useful than hearing what its weakest cards are. What's its strongest card? And I'll tell you what I think it is, and then I want you to either agree or disagree.



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

I think its strongest card is at the negotiating table. I think this – that Iranians have always best at Americans at the negotiating table. They've run circles around multiple U.S. presidents, multiple U.S. negotiators. I think they're excellent negotiators. I think there are elements of Iranian culture that help them in these negotiations. And I think also mostly, they're very experienced at negotiating. I think they negotiate all day, every day in Iran, and learn from a young age actually how to negotiate. And then you've got people like [Abbas] Araghchi, who's the foreign minister and the lead negotiator, who's been involved in Iranian nuclear negotiations for decades. He was involved as Javad Zarif's deputy in the 2015 negotiations, where, in my view, they ran circles around our negotiators and got the fatally flawed JCPOA. So, I worry about how we're going to do in Islamabad negotiating with Iranians.

But I guess from a military perspective, or political one – you choose – what's their best card, and what are you most worried about if you see them playing it?

SPENCER: Sure. I think that there isn't a card that we haven't seen, but it's just a variation of doubling down on the chaos strategy, which is just attacking all the Gulf States' vulnerable energy resources, the asymmetric ways to impose a cost, a multi-month cost to the Strait of Hormuz. Because I believe, I agree with you, actually, on the negotiation table, but also playing the Western ideals for short wars, right? So, to cause this, as they are famous for, to drag out negotiations, drag out disengagement with them, where everybody wants to go back to doing other things, which is a very problematic. And I think the United States has reminded people, and I did it as well, on this idea of short wars. But the whole drawing it out, whether that's on the cost of the global economy, the cost to politically, as even the United States, whether it's the 60-day marker, the midterms, you name it. There are considerations, of course.

And that figuring out a way, which is a strong card, to just draw this out, to the point of – which I don't think that President Trump would allow them to – of increasing the risk of taking action and going back to the chaos strategy. Because again, if only 5 percent of your missiles get through, and they hit Qatar's gas field again, you get to a imposing cost on the opposite side, this being us, although I too want us to win, the United States, to achieve a better piece, which I do think is the outcome of this, is a better piece, and not the shortness to the point of no return that we had, which is its own measure of success like you mentioned. But returning to that chaos strategy, not – I still believe in my heart, that and other people play towards the whole theocracy, that they'll die rather than seeding anything.

That's just not true. And even in the history of international relations and even evil regimes, they want to maintain power. So, on their side, playing cards, imposing costs to not just the United States, but that whole chaos strategy that they attempted would be one of my biggest concerns, rather than just what they can get out of the negotiation table.

DUBOWITZ: Yeah, I think that's exactly right, John. I mean, I always think of it as sort of three clocks, right? There's a nuclear clock that's ticking by how long it's going to take for them to develop nuclear weapons. I think we've set that back. I don't think we've obliterated it, but I certainly think we've set back the nuclear clock. And then there's the second clock, which is the regime survival clock. How long will the regime survive? And survival is clearly a critical part of their calculations. I agree with you. I think there are people who want to die, but also think there are people who don't, and they want to live and accumulate wealth and project power.



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

And then the third clock is the American will clock. How much will do we have? And the Iranian game is to shorten the nuclear clock, extend the regime survival clock, and break the American will clock. And that really comes down to President Trump's willingness to sustain political and economic pain in order to remove this multi-generational threat. I agree with you. I actually think President Trump, for him, this is his legacy. It has also had been his obsession since the 1980s. People forget that. President Trump is somebody who came of age in a generation where he saw the feckless response of the Carter administration to the taking of our hostages, those hostages who languished for 444 days under the regime's hostage taking. And was talking about – I mean, I've seen clips of President Trump talking about taking Kharg Island from 1988, when he was on book tour.

He talked about how this would be a way to break the economic and political will of the regime. So, I think people underestimate the extension which the president is committed to this. So, let's be honest in the assessment, because I think there have been many things achieved in terms of military degradation and nuclear degradation, and clearly, leadership decapitation. But let's talk about Hormuz, because as we're recording this podcast, I think it's fair to say that the United States has not won the Battle of Hormuz. I think the United States is moving forward on a strategy, and I think the U.S. blockade of Iranian ports has been part of that strategy in an interesting way, where President Trump has flipped it on the Iranians. But let's think about Hormuz militarily, and to what extent do you think CENTCOM has a plan, is moving forward on a coherent plan? And don't want you to look in your crystal ball, but what is your best assessment militarily of our chances of winning that Hormuz battle, again, either militarily and/or politically?

SPENCER: Yeah, it's a great question. It's not a Clausewitz. I quote this old dead Prussian, because we all do, but the three-fourths of what we know in war is clouded in a fog. So, I come up with a bit of humble pie, knowing all that we don't know. Although I wrote a piece just out of frustration, truly, on what are the different options that the United States and Israel has to achieve its goals – if I could get people to agree on what their goals are. And I mean, if you could just go to the White House's extra, and how many times they've had the post, "Here are the four goals." And then the president, even on April 1st, said, "The goal is not regime change. It's never been regime change. I never said that." And people said – this is that cherry picking of data. But you asked me about the Strait of Hormuz.

And I wrote in that article about, because the Strait of Hormuz was in a certain status weeks ago, people believe that's because Iran was so powerful that we could do nothing about it. You asked me about CENTCOM planning. If anybody, having worked in the Pentagon, to include advising a four-star general in a little think tank that he created, thinks that the United States military, the Pentagon, the joint staff, CENTCOM, NAVCOM hasn't planned for a closure or a contest in the Strait of Hormuz, then they should never be allowed on another podcast in the world. There's entire task forces, whose sole job, Mark, for decades, is to plan the Strait of Hormuz scenarios: what capabilities does Iran have? What capabilities we need to have to deal with those? But because the president was factoring multiple factors to everything, from the market day-to-day to the supply of the oil, to the impact on whatever it was coming in and out, but ultimately the risk to direct action industry of Hormuz, we've seen this kind of Battle of Hormuz take over the media conversation, while the destruction of the Navy was identified as a primary objective of Operation Epic Fury. That goal, I don't know how many people could argue that that hasn't been achieved, right?



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

Most of it's sitting on the bottom of a sea. To answer your question, of course, CENTCOM planned it. Of course, it's about which course of action, branch, or SQL is implemented to lower the risk to international shipping trying to go through this narrow passage, to the U.S. forces that would use different options, whether it's seizing islands, strafing the entire coast of Iran to stop their ability. So, as of today, you have this blockade of a blockade, which is almost a blockade from afar, and we still don't know what's the impact. We know the dollar amount, and you did it in the intro, the impact to the Islamic regime, and then the second order effects, if this was ever to come to a stop impact, since this regime was already failing. The entire economy collapsed in January, and that's why you saw the rise of the protest.

But this is also about preventing them from ever using the threat again, right? War's an act of force, or the threat of force. And that's why the president keeps threatening very legitimate options that could be continued, but he, for many reasons, isn't doing that. But...

DUBOWITZ: But John, what does that mean operationally? I mean, I think a lot of our listeners, and I think people just out there in expert land, as you say, on X, have struggled with understanding the specifics of what CENTCOM, US Navy, can do operationally to open up the strait. I mean, they've obviously been trying to neutralize missiles, drones, going after fast attack rafts that the IRGC uses to harass ships. There is now the blockade on the blockade, as you say, which I think is an instrument of effective economic warfare, cutting off Iran's exports and imports in order to exacerbate the economic pressure. But where does CENTCOM go in terms of opening up the strait? I mean, are these naval escorts? How do we neutralize the offensive capabilities that Iran still has? And doesn't it just take one missile or one drone striking a big hole in one very large tanker container of oil to set this all back considerably?

SPENCER: So, this is the challenge to these questions, Mark, that I've gotten before, where I can provide a list of options that I can imagine. Of course, I don't have all the intelligence on what remains of the Islamic regime's power along the coast to project power outward. So, it isn't as simple as the drones or missiles striking a moving target, mining things, mining the straits, whether it's surface, midwater, on the bed, pressured, all this technical and tactical data that you need to have to have an understanding, but also an evolution of U.S. military capabilities. So, there's a list of things that – and this is what the president and the best military advice does – it brings in a list of options that could be done to – the standoff attack is what most people are – is the least risk – and most people are more familiar with, that we could actually restart bombing and focus all efforts on the Islamic regime's means to influence the Strait of Hormuz.

So, it doesn't have this all – and this is the certainties that people talk in. “They have the power to close it, and we can't do anything about it.” Well, that's just ridiculous. And then they think about, then you'll have some people, experts, that come on that might remember the last time we escorted for over a year commercial shipping through the Strait of Hormuz, and then, once a single ship was hit, Operation Praying Mantis, we unleashed – in President Trump's term – “unleashed hell” on those who – and then they got that message. So, this is real hard power. Of course, there are limits to it, but the idea that the US Navy – and there is more capability, I think it was – there are many people that kind of have pointed this out, that there's already more capability in the region than there was that during the last 40-day war.



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

There's another aircraft carrier on the way, that the capabilities are in the region to use overt capabilities. But again, there is now more land power. I'm a land power guy. I understand the fallacies in the whole boots on the ground thing, right? So, I don't want, as somebody who was there on the ground in Iraq, when the mission transferred from seas power, overthrew a regime, to build a nation in a country of very conflicting interest and sectarian violence and everything, I don't want boots on the ground that turns into nation buildings. But I'm also not so driven by fallacies that you couldn't seize key terrain in the Strait of Hormuz, which would give you a decisive advantage to knock things down or attack things in the Strait of Hormuz on the Iranian side, and whether that's US forces or other forces. And there are allies – Qatar, UAE, and others – willing to provide aid in opening the straight by force. But I mean, war is a contest of will. Of course, you want to impose your will on the whoever's in charge.

And this is, again, your expertise, Mark, who's in charge right now? Is it the IRGC calling the shots? Is it the political so-called leadership, to influence them that the cost of continuing their behavior is too much, right? And this puts on that center of gravity of Kharg Island, right? So how do I open the Strait of Hormuz? I can do it by force. I can do it through force to convince them that it's no longer in their best interest of survival. While regime change is not the goal, you know better than I do that the regime really wants to stay in power. And if you really attacked, you could attack their power, and of course, the bridges. But Kharg Island and everything else, which does have second and third order effects in Iran and globally, you could get the Strait of Hormuz open. So, the problem is that people talk uncertainties.

We can't do this. They can do that. It's not true. And there are things that I can't even think, right? So even seizing an island, whether we want to seize, isolate an island, destroy an island, we can absolutely do that with things that I don't even know about. So, if this isn't Iwo Jima, the Marines want to seize an island. It isn't going to go like it did in World War II. I mean, even a Marine expeditionary unit has, what, 20 F-35s? It's going to bring something that nobody else has ever seen in an operation that is what they are trained to do but haven't done it with this capability before. So, it's not an easy answer, Mark. The reason that it's what it is right now is because of the risk and matter of fact. But the whole boots on the ground thing to me is also frustrating, as – so you want us, you're rooting for us to lose, but you want to, if anybody puts a single boot on the ground, which there already have been boots on the ground, to be clear, then it's a failure.

DUBOWITZ: Right, right.

SPENCER: It's just crazy.

DUBOWITZ: Well, I think, John, you're getting at an important point I've tried to make, and that is that we can fight to open Hormuz.

SPENCER: Absolutely.

DUBOWITZ: That the US military has had a plan in place for decades. They're moving through that plan. But if we had allowed Iran to continue on the trajectory that it was on before the 12-Day War, and now before the 40-day war, that we would have emerged when Iran would have reached a lethal end state with nuclear weapons, ICBMs, 10,000 ballistic missiles, hundreds of thousands of drones, a military that had been built by China and Russia, a Navy, an Air Force, and certainly hundreds of billions of dollars in sanctions relief to fund it. When Iran was at that lethal end state, there would be no fight over Hormuz, because when the Iranians closed Hormuz, we couldn't fight them, because the consequences of that battle would have been horrendous for U.S. forces, U.S. allies, U.S. embassies, and ultimately for the American homelands. So, they would have won that battle without firing a shot, and they would have a permanent stranglehold over Hormuz, over global energy markets, and over the global economy.



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

The mere fact that we're having a debate and a discussion and watching it play out in real time about the Battle of Hormuz suggests that we are fighting it in an advantageous way, where we are stronger and they are weaker, not when they are in this lethal end state and we have no ability to fight them. So, for me, Hormuz is something that was inevitable, and certainly not surprising. As you say, in the 1980s, the Iranians tried to do something similar during the Reagan administration, and during Operation Praying Mantis, we sunk half the Iranian Navy, and then had to escort tankers for many, many months.

So that's on Hormuz. I want to shift the conversation to missiles, because this is another area where I think supporters of the war have talked about the severe degradation done to Iran's missile program, and critics of the war point out that, well, not enough degradation has been done, and Iran still has these deadly capabilities.

Where do you come out on Iran's missile capabilities? Because I actually think the major reason for fighting the 40-day war is to prevent Iran going from the couple thousand ballistic missiles that it had before the war started, to a significant diminishment of that. And then, had we not fought this war and the 12-Day War, Iran would've emerged, according to Israeli military intelligence, with over 11,000 ballistic missiles in about two and a half years.

SPENCER: Yeah. One, having – I know we have great professional respect for each other, but actually having an institution and a set of experts who have looked at this for more than 40 days is helpful in understanding the Iran strategy, right? Oh, what percentage of the launchers have been attacked? If you look at the 10,800, I think, according to the IDF strikes that the IDF had made, and then the 13,000, I think, strikes that the United States have made, people – what were they hitting? And most of the – I'll talk about our own analysis. We know that that was not just attacking launchers, mobile launchers, supplies, but every bit of the system to create another single missile again, right? So, the factories, the fuel components, the scientists, the research centers – that's what's been done in 40 days, is destroying. And I know we're going to talk about the nuclear program and what's the estimate of how far it's been put back.

And the reason Iran has such an expansive missile development program is because of China. And I think the president even said in the last couple of days that they stopped the shipment problematically, having some missile component supplies that Iran needs, and it might have been from China, it might have not been, within the missile program. The United States and Israel has systematically destroyed Iran's ability to create more missiles today. Then we have the argument of, yeah, but what about their missile launcher supply today? I don't have that intelligence. I believe it's significant. And if anything, I will use the metric of how many missiles can they get out? How many of those missiles hit what they're planning to hit? And it's to the realm of 90 percent, which if you have 2,500 missiles, that's still a lot of missiles. But imagine if they had 11,000 missiles, going back to you, right? And this is what we elect political leaders to assess all the intelligence and make that decision of we're at a point of no return.

And I believe, like you, that President Trump acknowledged that we are at a point of no return, and if they continue down this path that they've been allowed to continue, we would get there, and we could do nothing about it. And it would be a very dark Middle East and a dark world. I think there's been a systematic dismantling – that's the right word I want to use – of Iran's missile supply and military industrial complex.



No March on Tehran: The Military Logic of the Iran War

April 23, 2026

Featuring John Spencer

Hosted by Mark Dubowitz

DUBOWITZ: Yeah, I think that's right. I mean, I think the statistic that I'm most interested on the missile side is exactly that. It's missile production capacity. And I think the best we know, at least from public sourcing, is that Iran was producing about a hundred new ballistic missiles a month as they were on this glide path to many thousands of ballistic missiles. I think Secretary Rubio was the one who really put it very well, as he always does, that it was really the creation of this missile shield that would then give Iran immunity from US or Israeli action. And then under this missile shield, the Iranians could then finish their nuclear weapons program and really then be in a position of enormous power and influence. But the statistic most interesting is a hundred new ballistic missiles a month, and now it's down to zero. So today – and that might change tomorrow – but today, the Iranians can't produce one new ballistic missiles.

So, every ballistic missile they fire, or everyone that gets destroyed, they can't replace it. And I think that's an important element of success, and certainly significant degradation in those deadly capabilities.

SPENCER: A hundred percent. And that's the level of analysis that seems to be missing in the mainstream, that is important if you go back to the start of the operation, what the goals are with the nuclear, missile, Navy, proxy program.

DUBOWITZ: John, listen, thank you. Thank you for everything that you've done. Thank you for your analysis and look forward to having you back as this campaign proceeds.

SPENCER: Thank you so much, Mark.

DUBOWITZ: Thanks to John Spencer for helping us think clearly about what's actually driving this conflict. The war doesn't fit the old templates. There may be no dramatic invasion, no surrender ceremony, no single decisive moment on a battlefield. What we're watching instead is a contest of wills fought on multiple fronts at once over Iran's military, its nuclear program, over the Strait of Hormuz, and over an economy being squeezed harder by the day – the Iranian economy, and to some extent, the global economy. This question is whether pressure can dismantle all of it faster than the regime can adapt, disperse, and survive. Can Iran still command effectively? Can it deter? Can it project force abroad while holding control at home? Can it still rebuild a credible path to a nuclear weapon and to a massive missile arsenal? And can it keep its economy from collapsing under a blockade that costs it nearly half a billion dollars every day, while it has sustained over \$300 billion in damage in the past 40-day war?

Those are the questions now. Because in wars like this, victory isn't a single event. It's a point where one side quietly loses the ability to do what it used to do. To launch, to coordinate, to intimidate, to govern, to race towards a bomb, to pay its own bills, to control its own people. Whether the Islamic Republic absorbs that pressure, adapts to it, or starts to crack under it, will shape how this war ends and what comes after across the region. This has been *The Iran Breakdown*. I'm Mark Dubowitz. Until next time.