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Commentary...

The End of the OPEC Era By Amit Segal

The United Arab Emirates has announced its departure from the Organization of the Petroleum Exporting Countries (OPEC). As the group's third-largest producer, the move is monumental. By way of comparison, it is akin to a permanent member of the Security Council leaving the United Nations—except, of course, the world actually cares about what OPEC has to say.

To understand why this has huge implications, some context.

OPEC was formed in 1960 by Iraq, Iran, Kuwait, Saudi Arabia and Venezuela, ostensibly to ensure the global stability of the oil supply, but fundamentally to act as a cartel to fix the price of oil at a level that benefited the members. As their charter states: "The principal aim of the Organization shall be the coordination and unification of the petroleum policies of Member Countries and the determination of the best means for safeguarding their interests, individually and collectively."

But the organization has defined its "interests" quite broadly. Most notoriously, the cartel decided in 1973 that the members' interest was the punishment of the global economy for Israel's victory in the Yom Kippur War, leading to a period of stagflation and economic decline. That wasn't their only time flirting with political manipulation; other instances include pressuring Iran during the Iran-Iraq War and cutting production to keep prices high in 2022, punishing the U.S. for criticizing the Saudi government and enriching Russia during its invasion of Ukraine.

So, why now?

Well, the oil market is vastly different from that of the 1970s. The first blow to the OPEC monopoly was that the U.S. now ranks among the world's top three exporters of crude following the shale revolution in the 2010s. The U.S.'s impending control over the reserves of one of OPEC's founding members, Venezuela, is another, and Operation Roaring Lion is the third. During the recent conflict, production policy was coordinated through OPEC, but in some ways it was every oil nation for itself: the Saudis had their contingency for bypassing the Strait of Hormuz, and the UAE had its own.

The exit also resolves a long-standing tension between the UAE's rapidly expanding production capacity—which targeted 5 million barrels per day by 2027—and restrictive cartel quotas that forced the nation to operate roughly 30 percent below its capability. This is reflective of a fundamental difference in interests: Saudi Arabia requires crude prices near \$80 per barrel to balance its national budget and fund Crown Prince Mohammed bin Salman's ambitious plans for the country.

Conversely, the UAE possesses a vastly more diversified economy and massive sovereign wealth funds. The UAE's overall economic health is tied more closely to global macroeconomic growth than to the nominal price of a barrel of oil. By exiting OPEC and actively increasing global supply to lower energy costs, the UAE can deliberately stimulate the global economy, curb Western inflation and thereby bolster the returns of its own massive international investment portfolios.

Perhaps most interestingly, the withdrawal signals a deepening geopolitical rift with Saudi Arabia. Though the two nations have long clashed through proxies in Yemen and Sudan, the UAE is now charting a more permanent, independent course—one that hugs the U.S. and Israeli coasts rather than being bound to the Saudi winds. This isn't just speculation; MBZ's top adviser, often considered his mouthpiece, has grown increasingly vocal about his disappointment with the Arab League and the Gulf Cooperation Council. But even when the relationship isn't overtly adversarial, the UAE is clearly finished with regional conformity.

The notion of regional conformity is deserving of a quick tangent.

For decades, the West operated under the belief that the Middle East was a unified, monolithic bloc—one in intractable opposition to the existence of Israel. This misconception led successive U.S. administrations to treat Israel at arm's length,

demanding Israeli concessions as a prerequisite for gaining "Arab favor." The UAE's exit from OPEC further proves that this framework is outdated, if it was ever true at all. The region isn't a monolith; it is a collection of sovereign states with divergent and often competing national interests.

I am losing count of the tectonic shifts occurring in the Middle East under the Trump administration, but this is easily one of the most significant. The transition of oil toward a true free-market commodity is virtually unprecedented in global history.

And this may only be the beginning. Today, the UAE's most prominent voice, Amjad Taha, promised another historical day is imminent. While the nature of that day remains a mystery, we may very well be on the cusp of a new economic era.

(It's Noon in Israel Apr 29)

Who's to Blame for Declining American Support for Israel?

By Jonathan S. Tobin

The shift in U.S. public opinion is real and can't be denied. Though polls still show a plurality of Americans are still on the side of the Jewish state and that the alliance with Washington has never been stronger, the decline in overall support has been precipitous. Since the Hamas-led Palestinian Arab terror attack on Israeli communities on Oct. 7, 2023, growing numbers of Americans, especially among the young, have decided that the Israelis are the perpetual bad guys in the ongoing conflict with the Palestinians. The joint U.S.-Israeli efforts to stop Iran from getting a nuclear weapon may have only accelerated this trend and the accompanying surge in antisemitism that has made itself felt in public discourse, as well as on college campuses and in the streets of American cities.

Predictably, this has led to a continual stream of articles from a variety of sources in the secular press and the Jewish world purporting to explain why this has happened. Some come from outlets that are intrinsically hostile to Israel and celebrate the collapse of what was once considered a bipartisan pro-Israel consensus. Others speak of this change with regret and claim to be motivated by a desire to make Israel popular again.

But almost all of them are wrong. The mistake is not in recognizing that a problem exists. Rather, it is in imagining that there is much that the State of Israel or its U.S. supporters can do about it.

As with most discussions of antisemitism, which is what the increase in anti-Zionism truly is, the error is in assuming that the critiques of Israel are rooted in what it does or doesn't do. Israel's leaders and government are as flawed as those of any other country. But the shift in public opinion is a product of changes in American society, not the mistakes or even the alleged crimes committed by Israelis.

Accepting this terrible truth is as difficult for Israelis and their Jewish supporters as solving the intractable policy dilemmas that Jerusalem faces. Yet accept it they must if they are to avoid compounding the problem by making further blunders that will only make the situation worse.

Ironically, many Israeli and American Jews have internalized some of the most unfortunate tropes of traditional antisemitism. Jew-haters on the right and the left have treated the objects of their abhorrence as if they had supernatural powers to do harm to them. Marxists have imagined them as the not-so-secret force behind the alleged evils of capitalism, colonialism and imperialism. Right-wingers have conceived of them as the masterminds of a global Marxist plot against their national existence or their faith. Many adopt the self-contradictory claims of The Protocols of the Elders of Zion forgery, in which they are somehow part of both conspiracies.

For all of their justified scorn for the calumnies of antisemites,

the truth is that many Jews have accepted this mindset, attributing to themselves the power to fix insoluble problems and to persuade people with minds that can't be changed to see reason.

Just as many, if not most, Israelis and Jews once thought they had the power to win over the Palestinians via goodwill and far-reaching concessions; some are now ready to believe that they have the power to change American public opinion. They think that a change in government, a willingness to stop defending themselves or even by adopting clever public-relations strategies, the downward trend in support can be halted, if not reversed.

Of course, many have also finally come to grips with the fact that the conflict with the Palestinians can't be ended even by the most generous of peace offers. As such, they ought to understand that the dynamic with respect to the successful mainstreaming of anti-Zionism is similar. Israelis don't have this power. They never have and never will.

To point this out is not to say that Israel can't do better at explaining itself to the world—or at least try to do so. Certainly, the current government and its predecessors haven't consistently put forth much of an effort to do so. Nor is it the case that Israeli governments haven't made mistakes. They have—and big ones, like any other government, including the world's other democratic states.

But when you seriously examine the efforts to apportion blame for the current downturn in Israeli popularity, the explanations the critics provide are either inadequate or lead nowhere.

Some blame Prime Minister Benjamin Netanyahu for alienating Americans because of what they consider to be the extremism of his governing coalition or the policies it pursues. They say Israel has become too right-wing, nationalist and religious on his watch. They point to any infraction as corruption. They attribute it to statements of cabinet members like Itamar Ben-Gvir or Bezalel Smotrich, or the allegedly bad behavior of the Jews living in Judea and Samaria ("settlers" in the "West Bank") or the rare Israeli soldiers who do something indefensible, like the one who desecrated a cross in Lebanon.

Others say Israel blundered by adopting a transactional approach to the United States. According to this argument, embracing Republicans, especially President Donald Trump, while taking umbrage at the Democrats' positions was mistaken. The pro-Israel community's willingness to be too critical of former President Barack Obama over his 2015 Iran nuclear deal and of President Joe Biden for his half-hearted backing of the war against Hamas—and slow-walking and even denial of the supply of weapons during the conflict—was, we are told, a misjudgment.

By applauding and working with Trump, the Israelis are alleged to have made a deal with the devil that will come back to haunt them when the Democrats inevitably come back into power. Belief in this thesis has only grown since Trump's decision to join with Israel in attacking Iran, which the war's critics blame on Netanyahu dragging him into a conflict that they assert isn't popular or in America's interests.

Most of all, they assert that the war Israel waged on the Hamas perpetrators of the Oct. 7 atrocities was too brutal and killed too many civilians in Gaza, where terrorists rule over some 2 million people. They make the same claims about efforts to prevent Hezbollah operatives in Lebanon from making northern Israel uninhabitable or to forestall Iran's desire to eradicate the Jewish state. It is, they believe, all about the "genocide" Israel is supposedly committing against Palestinians. Stop killing innocent people, they say, and Israel will be better liked—or at least, less unpopular.

While these arguments make sense to Israel's critics, they have it all wrong.

The rise of the right in the Jewish state wasn't the product of a reactionary impulse within Israeli society. If Netanyahu, the Likud and its coalition partners have won most of the elections during the course of the last quarter-century, it's because the peace process championed by the Labor Party and the left wing was exposed as a dangerous delusion. The Palestinians refused multiple offers of statehood in much, if not almost all, of the territory they claim. That destroyed the center-left's hold on much of the Israeli electorate. That and Palestinian support for terrorism during the years of violence associated with the Second Intifada (2000-2005) and the atrocities of

Oct. 7 ended belief in the possibility of a two-state solution among the overwhelming majority of the Israeli public.

To focus on alleged settler violence or other outlier actions is also to ignore the reality in which Israelis live. Even if a tiny minority of Israelis does things they shouldn't, the entire discussion of such crimes is premised on a willingness to ignore the daily toll of Palestinian terrorism that exists in the territories. Nor is the problem the things said by Ben-Gvir or Smotrich.

Israelis would choose peace, even at the cost of territory, if they could. But you have to be disconnected from the reality of the Middle East to deny that the century-old war against the Jewish presence in the country is inextricably linked to the national identity of the Palestinians. There is no Palestinian partner for peace—and won't be one until their political culture undergoes a sea change in which they will reject violence and accept that the Jews aren't going to be wiped out or go away. Those Americans who cling to ideas like two states or imagine that there is anything any conceivable Israeli government can do to persuade the Palestinians to end that war simply haven't been paying attention to the events of the last 25 years or choose not to do so for reasons of their own.

Israelis remain divided on whether they want Netanyahu to continue leading them after a total of 18 years in power. But they are not divided on the necessity of the wars their country has fought against Hamas, Hezbollah and Iran. The same critiques used against Netanyahu will be employed against his political opponents should they prevail in the elections that will be held in Israel later this year.

Nor should anyone upbraid Israelis for embracing Trump.

It was not Netanyahu and Israel that turned on the Democrats. It was the Democrats who had increasingly abandoned the Jewish state. In the last generation, the Democratic Party, joined by the education system, the media and the arts, has been largely taken over by woke ideologues. The long march of the progressives through these institutions has helped indoctrinate a generation in the toxic ideas of critical race theory, intersectionality and settler-colonialism that all falsely label Israelis and Jews as "white" oppressors.

As such, everything they do is considered wrong. And everything their opponents, who are accorded the status of oppressed "people of color" and perpetual victims, do is deemed defensible, no matter how wrongheaded or evil. That belief has filtered down throughout the political system in ways that no amount of Israeli concessions or outreach can alter.

Israelis can do more to explain the realities of the Middle East to an American public that knows little of their own history, let alone that of the Jewish state and the Palestinians. But clever messaging, better use of social media or attempts to change the subject to a discussion of the great things Israeli genius has provided to the world are incapable of convincing those who have been taught to believe Zionism is racism to think otherwise.

While this was going on, the vast majority of Republicans remained pro-Israel and hostile to its Islamist enemies. Trump chose to be the most pro-Israel president to sit in the White House since the founding of the modern-day Jewish state. He has done so because he correctly views the alliance with Jerusalem to be in his nation's interests and believes that stopping Iran is similarly essential to American security. The notion that Israelis and pro-Israel American Jews should have nevertheless rejected him is nonsensical. Only a nation of fools would embrace its foes and give the back of its hand to its friends.

Nor can Israel win back friends or lessen hostility by committing less "genocide" or being kinder to its enemies.

That's because Israel has not embraced a harsh form of militarism or committed "genocide" in Gaza or anywhere else.

To the contrary, it is its Iranian-backed foes—Hamas, Hezbollah, the Houthis—and their foreign cheerleaders and enablers that seek the destruction of the one Jewish state on the planet and the consequent genocide of half of all of the global Jewish population. The Israel Defense Forces employ rules of engagement and policies that do more to avoid civilian casualties than any other army. The casualties in Gaza are the result of Hamas leaders' own efforts to sacrifice the population in their midst. The fact is that up to half of those killed are Hamas operatives, meaning that the ratio of civilians to combatants killed is lower than that of any urban combat in

modern history.

The only alternative to the policies Israel has pursued in Gaza, Lebanon or Iran is to simply sit back and allow the genocidal terrorists who committed the Oct. 7 atrocities the impunity to do so again at a time of their choosing. That is something no rational government would do. Israel tried during the 17 years that Hamas has ruled Gaza as an independent Palestinian state in all but name to live with this murderous regime. The country learned on Oct. 7 that this was a mistake that would be paid for in the blood spilled during the largest mass slaughter of Jews since the Holocaust.

What those liberal journalists, foreign-policy establishment pundits, and Democratic activists and politicians who criticize Israel's war policies apparently want is for the Jewish state to repeat that same blunder, regardless of the cost in Jewish lives.

It's time to recognize that the problem isn't with Israel but with its critics. More to the point, the issue is the woke war on the West. That has influenced a generation of young people to see Israel, Zionism and Jewish rights as somehow illegitimate. Nor is this limited to the political left. The same people who hate Israel tend to also take a dim view of America's role in world affairs. As is the case with every other antisemitic conspiracy theory embraced by the left or the right, the issue isn't what the Jews have or haven't done. The problem is the lies and distortions that antisemites believe.

Israelis and Jews want to feel they have the power to alter the situation with gestures, policies or even just expressions of goodwill. That apparently can't happen. Still, it's wrong to blame them for the delegitimization and demonization of their nation and its rights.

What can Israelis and the pro-Israel community do about this?

They have the power to stand with their friends and make themselves as strong as possible. They can make alliances wherever possible with those who want to be their friends and be more skillful in putting their best foot forward to the world, while explaining the facts about the conflict in which they are stuck whenever possible. They can support those seeking to defend the values of the West and the Judeo-Christian heritage that is the foundation of American democracy, as well as Zionism.

Equally important would be for friends of Israel to stop the breast-beating about their supposed sins and start playing offense by pointing out the lies being told about them. In particular, those who care about Israel and the facts should support independent media outlets that tell the truth about the conflict like JNS, rather than those that mainstream antisemitic pro-Hamas propaganda.

The information war that is being waged against Israel and the Jews is exacting a price in isolation that is far from insignificant. But the price of losing the actual war on the ground against genocidal terror regimes would be far higher. And those who counsel Israel to adopt policies that would lead to such a defeat are neither well-meaning nor wise.

It's time for supporters of Israel to stop internalizing the false arguments that their opponents seek to impose upon them. Israel isn't perfect and doesn't have to be. But blaming it for the lies and acceptance of beliefs antithetical to Jewish life and the survival of Western civilization itself is neither logical nor productive. It means blaming the victims for the crimes of their persecutors. That's a strategy that never worked throughout millennia of Jewish history, and it won't do so now. (JNS Apr 29)

A NATO That Doesn't Support U.S. Action Shouldn't Exist

By: Dimpee Brar

President Donald Trump's declaration that, for the North Atlantic Treaty Organization, "the party is over" was treated like a barbarian shout in the salon. Yet his statement has the impolite virtue of being true. For 75 years, Europe has hosted the most expensive open bar in history, all of it paid for by the United States, and called this dependency an "alliance." Now, when the bill is presented and the host suggests perhaps the guests might behave as if they own something besides opinions, they are scandalized.

Nothing has exposed this charade more clearly than the recent confrontation with Iran. The most revealing actor was NATO Europe, which, at the precise moment when it had the strongest interest in American protection, chose instead to lecture, obstruct, and deny

access to bases that exist only thanks to American power and American money.

By obligingly parading its missile capabilities, Iran reminded the world of a basic geographic fact: Europe is closer to it than the United States. Those sleek Iranian rockets can reach European cities more easily and more quickly than they can cross the Atlantic.

Whatever else may be said of them, the ayatollahs have done the math. From their vantage point, London, Paris, Berlin, and Rome lie far nearer than New York or Washington. If anyone has a direct, existential interest in seeing Iran's capacity contained, deterred, and destroyed, it is Europe.

Yet when the United States seeks to use NATO-linked bases, built, supplied, and effectively guaranteed by American taxpayers to confront precisely this threat, Europe responds not with urgency but with sanctimony. Washington must ask permission, fill out forms, and submit to debates in parliaments that cannot fund their own armies, much less fight their own wars. America carries the burden; Europe holds the clipboard.

The absurdity would be comic if the stakes were not deadly. The continent that cannot defend itself against Iran's missiles insists on the right to constrain the one power that might actually do so. NATO has become the strange arrangement in which the guardians must ring the doorbell at the very house they underwrite, while the children decide if they may enter.

This, more than anything, demonstrates that NATO is not our friend in any serious political sense. Friendship implies shared risk, shared burden, and reciprocity. What we have instead is dependence disguised as partnership, veto power disguised as consultation. The alliance serves increasingly as a mechanism for Europeans to domesticate American power: to harness it for their security while subjecting its use to their sensibilities. The United States provides the missiles; Europe provides the misgivings.

The strategic reality beneath all this theater is simple enough: the United States does not merely "constitute" NATO, it is NATO. Remove American nuclear guarantees, American command-and-control, American intelligence, American air and naval power, and American satellites, and what remains is a conference schedule.

Trump's "paper tiger" metaphor flatters; a paper tiger at least suggests the outline of a beast. NATO without the United States would be a filing cabinet with good branding.

Europe's behavior during the Iran crisis is particularly revealing because, for once, the threat is more obviously aimed at Europe than the United States. In the Russian case, they oscillate between fear and commerce: in public, Europe strikes a heroic pose against Moscow with denunciations of aggression, solemn invocations of the rules-based order, declarations that "Ukraine must win." In practice, however, it has spent years bankrolling the very Russian war machine it deplores through its purchases of Russian energy.

But with Iran's missiles, the trajectory is simple and the target clear. Those trajectories arc toward Europe.

Yet still they obstruct. Still, they insist that the United States must not use "their" bases, "their" territory, for operations that might inflame opinion in Tehran or among their own delicate electorates. The same leaders who cannot field serious forces, who cannot meet even the modest 2 percent defense spending goal, suddenly discover the courage to say no to the only nation that stands between them and the consequences of their evasions.

At this point, the language of "shared values" becomes farcical. What value, precisely, is shared when the nation willing to act must plead with nations unwilling even to allow access to airfields that they did not fund, cannot defend, and could not operate without American support? The real shared value is comfort. Europe values its comfortable moralism; America has so far valued the comfortable illusion that this arrangement is equal and noble.

The Iran episode also exposes the deeper insult in NATO's current form: that the United States should require European permission at all. The United States underwrote the deterrent and alone possesses the capacity to project power beyond the continent. Yet it is a supplicant before parliaments that could not, if left alone, defend themselves against precisely the threats they now ask the United States to confront more "responsibly."

This inversion of dependence into authority is the essence of the

problem. NATO was originally conceived as a way for the United States to extend its power to fortify a devastated but serious Europe against a mortal Soviet threat. Today, it functions as a device whereby an unserious Europe channels, constrains, and when convenient, repudiates the very power that keeps it alive. Thus the ally becomes a leash-holder.

All the while, the basic hard fact remains: the only thing standing between Europe and potential Russian or Iranian annihilation is the same American power they so enjoy condemning. Their militaries, hollowed out by decades of welfare-state priorities and philosophic pacifism, could not withstand a determined onslaught for long. This is as obvious in Moscow and Tehran as it is in the Pentagon. Only in Brussels is it politely ignored.

Trump's truth that the party is over invites a sober reconsideration. Alliances are not sacred relics but political arrangements. An alliance in which one party finances, supplies, and risks everything while the others preen, obstruct, and moralize is not an alliance; it is a liability. NATO must put up or shut up. (The Federalist Apr 24)

Iran's Regime is Being Suffocated, from Within and Without

By Harold Rhode

What is going on in Iran? To understand it, we should not analyze every detail in isolation. We need to look at the general picture—where the pieces fit together. When we do, the conclusion becomes increasingly clear: The Islamic Republic is under severe pressure, its leadership is fractured, and the conditions for regime change are developing.

An important analysis was published this week by Vaughn Cordle in an article titled, "The End of Iran's Regime Is Coming." Cordle is not known as an expert on Iran, but his analysis is excellent. He argues that "the fracture is internal, the pressure is financial," and that Iran's regime is approaching collapse. He cites interference by the Islamic Revolutionary Guard Corps in negotiations, payroll failures, absenteeism in security units, Dubai's crackdown on Iranian financial networks and the inability of the regime to "print purchasing power."

He also argues that the ceasefire extension and blockade put into place by U.S. President Donald Trump are not signs of weakness, but a way to let Iran's internal financial clock run out: "The clock is financial. The mechanism is payroll. The exit is a coup."

Cordle's central point is that the regime is not acting as one unified body. The foreign ministry and civilian leadership have shown signs of wanting negotiations. The IRGC, under hardline figures such as Ahmad Vahidi, appears determined to prevent concessions. Cordle notes reports that the IRGC has blocked appointments, interfered with negotiations and effectively assumed control of key state functions.

This distinction matters. The regime contains true believers and pragmatists. The true believers inside the IRGC see themselves through the lenses of the Shi'ite story of Karbala that took place in 680 C.E.: Imam Hussein, grandson of the Muslim Prophet Muhammad, standing with 72 followers against the massive forces of the Sunni Caliph Yazid, the Shi'ite mortal enemy. These true believers believe that suffering proves righteousness and that if they hold firm, Divine redemption will come. For such people, compromise with America, the Sunni Arabs or Israel is betrayal.

This is the key to revolutions. People can demonstrate in the streets, but regimes fall when they can no longer pay the people who protect them. Security forces need money to eat. The Basij need money. Police units need money. IRGC-linked personnel need money. Once payroll stops, loyalty becomes negotiable. What Trump appears to want to do is block the Straits of Hormuz, to suffocate Iran financially by not allowing it to export oil, Iran's only real source of earning money.

The policy seems to be working. Cordle cites reports that police special units have been paid late, Armed Forces personnel have gone unpaid, and absence rates in some units are approaching 90%. He also notes reports of defections and even the use of 12-year-old children by the Basij, the thug enforcers of the IRGC. These figures need continued verification, but they fit the broader picture: The regime's coercive machinery is losing its material foundation.

Dubai is another major factor. For decades, Dubai has been a clearinghouse for Iranian sanctions evasion and money laundering.

Cordle argues that after absorbing Iranian attacks, the United Arab Emirates began shutting down Iranian financial institutions in Dubai, arresting IRGC-linked money changers and freezing Iranian assets. If Dubai stops being a financial escape valve from Iran, then Tehran's rulers are squeezed from every direction.

Trump's negotiating tactics are exposing the fractures. His pressure, especially the blockade affecting the Strait of Hormuz, coupled with the strikes on petrochemical and financial infrastructure, is suffocating the Iranian system. Cordle's point is that every day the blockade continues, Iran loses oil revenue, toll revenue and hard-currency access. The regime can print rials, but it cannot print purchasing power.

Another important tool against the regime is TousiTV, which burst onto the scene not long ago as an excellent source of information about what's going on inside Iran. Led by political commentator Mahyar Tousi, an Iranian exile living in London, it now has 1.6 million subscribers on YouTube, and its daily podcasts have hundreds of thousands of hits. TousiTV is a fervent supporter of the exiled Iranian Crown Prince Reza Pahlavi, the son of the exiled Shah Mohammed Reza Pahlavi, who ruled Iran until being forced into exile during the Islamic Revolution of 1978-79.

In the past six months or so, Pahlavi has given numerous interviews and issued a plan for Iran's future after the regime of mullahs has ended. During this time, he has become stronger, clearer and more serious. He has risen to the occasion. He is the only national figure known to all Iranians. He may be the one person capable of serving as a national symbol in a transition away from the Islamic Republic.

In many ways, the situation in Iran resembles the Islamic Revolution in 1978-79. The shah's regime did not fall merely because people protested. It fell because the shah was either unwilling or unable to do what was necessary to stay in power. Having lived in Iran during the early and mid-stages of that revolution, I witnessed that for myself.

In contrast, the IRGC leaders still have the will to remain in power, but they are fast losing the ability to do so. It no longer has the ability to pay its enforcers as seems to be going under. The state has lost cohesion, confidence and the ability to command loyalty. The economy is collapsing. The ruling elite remains divided. The army and IRGC are not the same institution, and if the IRGC weakens internally, others can be expected to take over.

Historically, Iran has fractured and then been put back together. The hope is that a national institution, perhaps the army, can help preserve the country if the IRGC collapses.

This is where Pahlavi matters. In recent years, Iranians have chanted for his return. Many young Iranians have heard from parents and grandparents that Iran under his father—Mohammad Reza Shah—was vastly better than life under the Islamic Republic. They knew that Iran was modernizing. They knew that literacy, development and national pride advanced dramatically. And they know that life was improving by leaps and bounds. They may exaggerate, as Iranians often do, but the memory is real.

Pahlavi may not seem to be Trump's publicly favored candidate; indeed, Trump sometimes appears critical of him. But that may be deliberate. If Pahlavi is to succeed, then he cannot look like he is being imposed on Iran by America. He must look like Iran's choice.

Patience is therefore essential. Mossad director David Barnea recently said the mission in Iran "has yet to be completed," adding that Israel did not expect it to be completed immediately after the fighting ended, but planned for the campaign to continue after the strikes in Tehran. He said the Mossad's responsibility ends "only when this radical regime is replaced."

That is exactly right. The strategy requires time. The pressure must continue until the internal fracture produces a faction willing to act. The Islamic Republic is being squeezed from the sea, from the air, from Dubai, from its own unpaid forces and from its own now deeply divided leadership. If the pressure continues, the regime may fall into the hands of a new leadership that can return Iran from a repressive Islamic Republic intent on developing nuclear weapons and terrorizing the world into a nation with a glorious cultural heritage. Then, maybe it could ultimately normalize relations with its regional neighbors, the United States and Israel. (JNS Apr 27)