

# Little Boys Making Explosion Noises

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In 1953, Samuel Beckett wrote a play where two men wait for someone who does not come. They insist he will, they reorganize their entire day around his imminent arrival, and then, when he doesn't come, they calmly agree to return tomorrow, because tomorrow, obviously, is when he will come. Maybe. They hope. *Waiting for Godot* is less a story than a structure of expectation stretched past the point of reason. *Sound familiar yet?*

The language surrounding this war in the Middle East, because calling it simply the Iran war already feels a little too tidy for the mess before us, arrives pre-resolved. President Trump and his people speak as if major components of the Iranian war machine have already been decimated, folded into the past tense, and filed away in some cabinet marked DONE. Yet intelligence reporting this week strongly suggests something much closer to *partial* damage. About one-third of Iran's missile arsenal confirmed destroyed, another third damaged or buried, a meaningful remainder still active. That is *not* decimation or obliteration. It's a very expensive disagreement between rhetoric and physics.

And physics, rude as ever, keeps interrupting the speechwriters, neocon policy wonks, press personnel, and sycophantic hangers-on of the Trump regime, who return, each time, to the microphone looking faintly surprised.

Iran is firing missiles and drones regionally, including attacks on Israeli cities, Gulf targets, a long-range strike on Diego Garcia. The U.S. and Israel are still hitting missile, drone, and naval infrastructure while Washington insists the operation will conclude "in weeks, not months," preferably without ground troops, even as thousands of additional U.S. personnel have been moved into the region. Finished things are not usually this busy.

This is where the absurdity stops being ornamental and becomes load-bearing. The claim doesn't collapse under the contradiction, it just obligingly expands to contain it. "Obliterated" loosens into "severely degraded." "Very few rockets left" somehow

coexists with missiles still crossing skies that were apparently cleared and navies going on endless bombing runs to finish an apparently already finished job. At some point one begins to suspect that words in wartime operate like stretch fabric, designed, specifically, to fit whatever reality insists on wearing. No matter what happens, the sentence looks down, smiles, and says: *perfect fit, actually*.

Take the nuclear file. Operation Midnight Hammer, the June 2025 U.S. strike on Fordow, Natanz, and Isfahan, was declared complete, final, finito. Iran's nuclear program wasn't clipped or damaged but *obliterated*. Later reporting told a different story. One assessment said the strikes set Iran's nuclear program back by up to two years, while other reporting indicated only one of the three sites was fully destroyed and that some capabilities could recover far sooner. And yet here we are again, returning to the same facilities, the same capabilities, the same need to "neutralize" what was apparently neutralized already, and obliterate the already obliterated. *Huh?* How many times can a thing be neutralized or destroyed or obliterated, or even decimated, before the words themselves ask to be reassigned? Twice? Three times? Until the thesaurus files a complaint?

Then there's the Strait of Hormuz, where absurdity has built itself an extortion franchise and is doing quite well, thank you. Through a corridor that narrows, at points, to just two miles of navigable channel, roughly one-fifth of the world's oil and gas normally moves. Iran has shut it down—traffic has fallen roughly 97% since late February—and told international bodies that only "non-hostile" vessels may pass. Reporting from the AP and the *Financial Times* suggests the IRGC has taken that declaration literally. Passage must be negotiated, and negotiated expensively. Ships are reportedly paying as much as \$2 million per vessel in cash equivalents or through fast-settling crypto rails like Tron. Once payment clears, coordinates follow, and a ship the size of a small city begins threading itself through one of the most consequential stretches of water on earth.

"Non-hostile" is doing heroic work here. Non-hostile to whom? For how long? According to what definition? Even after Iran offered safe passage to friendly countries, ships still turned back. Iran's assurances were not enough. The point is not merely that the passage is dangerous. The point is that even the permission has become absurd.

Imagine trying to move a floating steel neighborhood through a corridor the width of a municipal misunderstanding, while the rules change mid-transit and a very angry man with a gun and a clipboard waits at the other end.

So yes, we have arrived at the stage of history where one of the most important energy chokepoints on the planet is operating as a mix of a customs office, a protection racket, and a geopolitical experiment in dynamic pricing.

Oil, being less sentimental than statesmen, reacts accordingly. Before the latest escalation, Brent crude sat in the mid-\$80s. It has since surged more than 50%, pushing toward and at moments brushing against the \$120 threshold that energy economists have long treated as a kind of fault line. Beyond that level, the risk is not just higher prices but systemic stress—inflationary pressure, demand destruction, the reappearance of the word *recession* in rooms where people prefer not to say it out loud. Under more extreme scenarios now being modeled—extended disruption, direct infrastructure hits, sustained closure—analysts at major banks have floated ranges from \$130 to \$150, with UBS suggesting a month-long Hormuz closure makes \$150 likely and outlier cases reaching higher still. At that point, the war stops being *over there*.

The modern oil system, formalized with the founding of OPEC in 1960, has absorbed shocks before. The 1973 oil embargo, the 2008 financial crisis, the surreal moment in 2020 when collapsing demand during Covid briefly pushed oil prices negative—a barrel of oil acquiring the strange and undignified property of costing less than nothing, a sentence so stupid it still sounds made up. Those shocks had shapes: beginnings, middles, ends. This one doesn't. This one metastasizes. Supply disruption, military conflict, and somewhere underneath all of it, in plain sight, the people with access to the decisions placing bets on Polymarket and Kalshi about escalation, destruction, death, and which way the price of oil moves when the bombs land.

How fortunate, then, that the same people who *know* things, and in some cases *decide* things, have discovered that war, properly positioned, is also an asset class. Not in back rooms or through proxies, but publicly, on regulated platforms, in real time, for all to see. The market is pricing their judgment and possibly their corruption simultaneously, which would be shocking if we still had the bandwidth for shock. Some are improvising. Some are betting on the upside of their own chaos. Some are doing both, which means

the crisis and the trade on the crisis share the same hands and the same brain. Beckett gave us two men and a tree. We, being modern, have given the men a stake in the outcome and put the tree on a prediction market.

Then there is the information environment, which deserves its own wing in the museum of absurdity. Propaganda is not new. Neither is the fog of war. What is new is that the fog is now crowdsourced—no longer generated by states and broadcast downward but assembled in real time by millions of participants, most of whom believe they are witnessing rather than amplifying, sharing rather than recruiting, opining rather than serving. Each one a correspondent revealing their identity through the conflict, and adding a particle of noise to a cloud that no single actor can control or correct. Beckett's absurdity was intimate—two men waiting by a tree. Ours has acquired scale. Two men became many factions became countless information ecosystems, each internally coherent and mutually unintelligible.

So the war arrives not as one story but as a swarm of stories. Boomers and older Gen X get it from cable networks that discovered years ago their audience isn't actually interested in information and truth so much as confirmation, and have been cheerfully obliging ever since. Younger people get it from feeds increasingly clogged with AI drivel, recycled nonsense, fake explainers, orphaned clips, and teenagers with very strong views on naval strategy. *Helpful.*

Walk into any diner, coffee shop, or family get together, and someone will tell you, with the breezy confidence of a dentist explaining the offsides rule, exactly what is happening in Hormuz, in Tehran, in Tel Aviv, in Washington, and where it all goes next. They do *not* know. The person listening does not know. None of us know. We are all, in this sense, waiting for a clarity that is not coming, insisting it will, and filling the silence with everything except, well... *silence.*

Which brings us, inevitably, depressingly, to the names. Operation Epic Fury. Operation Midnight Hammer. Operation Roaring Lion. Operation Rising Lion. Operation Iron Strike. The language of these things now sounds like a focus-grouped blend of action movie, protein powder, and empire cosplay. Fury. Hammer. Iron. Roaring. Each title implies competence, direction, masculine certainty, a hand firmly on the wheel. Then the missiles keep flying, the ships keep waiting, the market keeps

convulsing, and the same men return to the microphones to explain why the thing that was completed last week requires further completion this week. We used to have a blunt word for this. *Lying*. Not strategic ambiguity or narrative management, but *lying*. Grand, glossy, public lying, performed with such total conviction that somewhere along the way the lying just became the job.

Meanwhile different capitals chase different outcomes and barely bother pretending otherwise. Gulf states are telling Washington that ending the war is not enough and that Iran's missile and drone capabilities must be permanently degraded. Washington is talking about timelines, pauses, and leverage. Tehran is talking about sovereignty, tolls, and terms. Israel is talking about more strikes. China wants its ships out. Europe wants energy without recession. Somewhere in the middle of all that, ordinary people would like their children, jobs, mortgages, and futures not to be turned into collateral for someone else's grand strategic mood swing.

The men at the tree keep reorganizing their day around the arrival of a resolution that never quite resolves. Here the waiting is costlier, louder, and filmed in 4K. Every few days a new decisive turn is announced. This weekend. These talks. This strike package. This ultimatum. This pause. This final push. Tomorrow, in other words. Tomorrow is doing heavy lifting again. Tomorrow will clarify. Tomorrow will settle. Tomorrow will redeem today's nonsense retroactively.

Maybe.

They hope.

And that is the real absurdity now. War has always been messy and chaotic. That part was never the absurdity. The absurdity is the insistence, repeated with a straight face, that the thing is under control while the evidence runs around behind the speaker and sets fire to the building.

It is the confidence with which men discuss "endgames" when no one has offered the public a coherent opening game, middle game, or even a decent set of rules. It is the spectacle of powerful people handling lives, fuel, trade routes, and history like boys on a bedroom floor moving pieces around a map and making explosion noises with their mouths—except the floor is the world, the money is real, and the dead stay dead.