

Trita Parsi: Massive Houthi Victory Transforms U.S.-Iran War

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#Glenn

Welcome back. Today is September 11, 2026, and we have the great privilege of being joined by Trita Parsi, the Executive Vice President of the Quincy Institute for Responsible Statecraft, also a prolific writer on his Substack. And make sure to check out the link in the description. So it's great to see you again. How have you been? Thank you so much.

#Trita Parsi

Well, surviving, I guess.

#Glenn

Yeah, well, these days, that's probably good enough.

#Trita Parsi

Well, as good as it gets.

#Glenn

We were just saying the situation keeps going from bad to worse. So there doesn't seem to be any peak in terms of escalation here. And, well, I guess the whole world's been focusing now on the Strait of Hormuz, as the U.S. and Iran are rapidly going up the escalation ladder and deepening, widening the war. But while all our eyes are on the Strait of Hormuz, we see now big things happening in Yemen. Ansar Allah, or as we refer to them in the West, the Houthis, have conquered a

very large territory along the Red Sea coast, and also, from what I understand, Perim Island, both of which would be north of the Bab el-Mandeb Strait. Can you explain the significance of this? Because this changes the Iran war as well.

#Trita Parsi

Well, actually, more than anything else, perhaps, it changes the Iran war. This is obviously a tremendous development that I would say is far more strategically important than what you have seen happening in the Strait of Hormuz for the last couple of weeks, which in the Western media has been presented as a strategic shift. In the Western media, it's been presented that because the Trump administration has been able to get more oil out of the Strait of Hormuz, this has led to a scenario in which the tables are turned. Time is on Trump's side, not on Iran's side, and strategically things have shifted. That was a tactical shift. It had not translated into a strategic shift.

It would have been potentially a strategic shift if it occurred in a scenario in which Iran did not have any further escalatory options. But it clearly did. And as a result, the Western media once again confused a tactical step forward for the U.S. with a magnificent, decisive strategic victory, and clearly it was not. What you're seeing happening in this strait is an indication that part of what the Iranians were going to do as a way of counter-escalating towards the U.S., now having gained that additional leverage, was not just striking at ships, it was not just striking at Jordan or other places, but also activating, together with the Houthis, of course, who are driving this in many different ways, the Bab el-Mandeb, because now the Houthis are in control, as you pointed out, of a significant area, significant islands.

They may be able to close the strait not just with missiles, but actually with even shorter artillery ranges. And as a result, all of this praise that, you know, the Iranians have lost control of this strait and more oil is flowing may now be reversed, because about five to seven million barrels of oil were being pumped by the Saudis through a pipeline to the Red Sea and then shipped out of the Red Sea instead of through the Strait of Hormuz. But that now is in jeopardy. That pipeline, if I'm not mistaken, is also on fire right now.

CNN just reported that about 40 minutes ago or so. So we're seeing clearly that there has been a counter-escalation. And as a result, this idea that the tide was on the U.S.'s side, I think, was a very short-sighted assessment. We saw the 10-year yield reach \$4.95 yesterday. Diesel is at \$6 nationally, more than \$7 in Southern California. Brent reached 110 yesterday. I think it might be slightly lower today. But nevertheless, a lot of things are shifting in a manner that was supposed to happen in the opposite direction, given the narrative that we were hearing just a week ago or so.

#Glenn

Yeah, well, this was Bessent's talk that, you know, soon the Strait of Hormuz will be insignificant, and also oil would go back to \$40. Again, all of this, you know, wishful thinking, or to call it lies. I

mean, I get what they have to do to talk down the oil price, but at the same time, I mean, it just comes off as delusional after a while. But, yeah, if I could say something on that.

#Trita Parsi

Yes, you know, governments do this all the time. And as you said, you can understand that it lies in the interest of the administration to try to talk down oil prices. It does not lie in the interest of Western media to believe it. It lies in the interest of Western media to scrutinize what all the governments are saying in order to be able to get closer to the truth, rather than parroting it as if it is the gospel.

#Glenn

I agree. No, that's one of the things, well, in all our current wars, where there's the conformity to the narrative, the media doesn't do its job very well, I think. But back to the Yemen issue, though. Yemen is also in a strong position now to strike Saudi energy assets. Yemen is also taking—the Houthis are taking—larger territories across Yemen. And also, yes, you said the Arab Peninsula issue. First, they blocked the Strait of Hormuz on the eastern side, and now the Red Sea on the western side. What do you think this would mean for not just the Saudis, but wider energy markets in that region? I mean, how long can they hold on, essentially?

#Trita Parsi

Well, prior to the war, about 12% of global oil flow went through the Red Sea and another 21% or so from the Strait of Hormuz. So we're talking about up to a third of global oil flow that is now at risk if both of these waterways are closed. And I find it very difficult to see the U.S. successfully opening—or it's not really fully opening, but partially opening—both the Strait of Hormuz and Bab al-Mandab at the same time. We're already seeing how overstretched the U.S. military is and how difficult this has been, particularly mindful of the fact that the entire logistical infrastructure for the American Navy in the Middle East has by and large been destroyed by the Iranians. What has happened in Bahrain, which now an American senior official has admitted, I think, to a newspaper, saying something along the lines that the Iranians just blew the whole thing up, has real repercussions.

So I think it's going to be very difficult for the U.S. to be able to do so. The Saudis could still pump oil unless those pipelines are also further targeted. But just imagine the cost this will add to that oil going towards China, mindful of the fact that most of this oil was moving east. If you can't go through the Strait, you can't go through the Bab al-Mandab, then you have to go north to the Suez, all the way around Africa, to be able to reach the Asian market. So that's going to be a tremendously, tremendously costly thing. So this is going to add a lot to oil prices in a way that probably will go beyond what we saw earlier. I think we should also keep one thing in mind. The big swing consumer now is, of course, China.

And China has suddenly started to buy much more oil. Part of the reason why oil prices never went up as much as they could have done early on was because the Chinese cut their demand. Now they're reestablishing that demand, and they're doing so just a couple of days before Xi is coming to Washington. So I don't know how much of that oil price is actually because of the Chinese. I suspect quite a lot, and how much of that is the Chinese doing it right before they're coming to Washington to just add a reminder to Trump of the degree to which the Chinese have a tremendous amount of leverage over the U.S. right now as a result, to a very large part, of this idiotic decision by Trump to go along with Israeli recommendations and start this war in the first place.

#Glenn

That's a great point. People often neglect, I guess, how much influence the Chinese market has on, well, essentially stabilizing oil prices. Because when the oil is cheap, the Chinese fill up their storage. So it puts a floor below. And when it's very expensive, then they start to reduce it. Yeah, this has had a tremendous effect. But with the Saudis, though, they're in a very tough spot now. And from what I read, they pleaded with Trump to help them by bombing Yemen. And, well, reportedly, Trump declined. Why did Trump not want to go down this road, but also what's the significance? Because the U.S. is the main security provider, supposedly.

#Trita Parsi

Supposedly, yeah. No, I think this is quite significant. I think it's important to understand the U.S. has already been sending military advisors, more than 100, to the Saudis to help them. The Saudis are already operating American weaponry, American airplanes. They're dropping American bombs. As I understand it, what the president said to the Saudis is that he's already provided a lot of support, and the Saudis already have a lot of American weapons. There are no restrictions put by the U.S. on the Saudis on what they want to bomb and how much they want to bomb. So the message from Trump, as I understand it, was, "Go ahead, bomb." But the U.S. is not going to get involved. But it's not going to stand in the way of the Saudis.

But it just tells you how much the Saudis are in such a desperate position of dependence on the U.S., in which even when they have all the bombs, they have all the airplanes, they have all the green lights, which they didn't necessarily have before, they still insist on the U.S. doing the job for them. And, you know, having two calls in one day certainly does seem to send a signal of a degree of desperation, at least on behalf of MBS. I think the Saudis, up until this point, had fared quite well in this war. They were capable of selling more of their oil through the Red Sea. They were not in the same tough spot as the Kuwaitis or the Bahrainis or the Qataris. They had also largely avoided getting attacked by the Iranians because they had largely avoided allowing the U.S. to use their territory, unlike Kuwait and Bahrain.

But now, by taking those military actions against the Houthis when the Iranians were flying planes to Sana'a airport, this whole thing got restarted. And now I think the Saudis are in a very tough spot with no clear way out of this. Because even if things are resolved with the Iranians, it does not necessarily mean that the situation with the Houthis is resolved. The Houthis are not Hezbollah. They're not some of these other groups that the Iranians have a larger degree of influence over. It's very clear that the Houthis are of their own mind. It doesn't mean that they don't coordinate with the Iranians at times, but it certainly does not mean that if the Iranians tell them to do something or not do something, that they will necessarily always abide by it.

#Glenn

If I could add one more point on it.

#Trita Parsi

You know, when the MOU was being negotiated, one of the demands the Iranians insisted on that many, again, kind of laughed at, and they thought that this is not possible or this is just one of these unrealistic Iranian demands, was a regional ceasefire. And the regional ceasefire, to a very large extent, was about the Houthis, and it was about Lebanon and Israel. And the Trump administration, in my view, wisely accepted it. They even spoke about it as their own demand or their own interest, recognizing that if they really wanted to end the war with Iran, they couldn't allow for other fires to continue in the region because those fires could spill over into getting Iran dragged in.

And then once the Iranians were dragged in, the U.S. would get dragged in as well. So they accepted it, at least for a moment. They seemed to have put pressure on the Israelis to abide by it. The MOU collapsed, and now that demand is long gone. And look what we're seeing. We're seeing Lebanon getting blown up. We're seeing the geographical spread of the war with the Houthis and the Saudis, the advances that the Houthis have made. And I think now it's more clear than ever why there needed to be a regional ceasefire and why any deal cannot just limit itself to the Strait of Hormuz, to the nuclear issue, but has to have that component. It has to be embedded in a larger framework for a regional ceasefire.

#Glenn

But if there's a push towards a ceasefire, or the Saudis want to walk this whole thing back and establish some peace with Yemen, what exactly does Yemen want here? What do they demand? I mean, what would a peace between Saudi Arabia and Yemen look like?

#Trita Parsi

I think the one thing I think that the Ansarullah will insist upon this time around, that they did not get as part of the Saudi-Iranian normalization, in which the Iranians put some pressure on the Houthis and the Saudis, of course, also stopped bombing, but the blockade was still in effect. And it's that blockade that the Saudis pointed to when they objected to the Iranian airplanes flying and so on. The Saudis obviously don't want to see the Iranian relationship on a technological and military level be able to flourish between the Houthis and the Iranians.

And that's part of the reason why they're insisting on this blockade. But I would suspect that in order for there to be a ceasefire this time around, at a minimum, Ansar Allah will try to insist on the lifting of the blockade as part of such a deal. And it's going to be very interesting because the Iranians are going to be insisting on the blockade on Iran being lifted as well. There's not going to be any deal, or an opening of the Strait of Hormuz, or a nuclear component, or Lebanon, unless the United States also lifts the blockade on Iran.

#Glenn

Well, that has, I guess, over this last few days, been the main achievement by the Houthis in Yemen. That is, they retaliate against the Saudi blockade by putting a blockade on the Saudis. But what would be the considerations, though, for the Saudis? Why would they not want to lift this blockade on Yemen? What would be the cost to Saudi Arabia?

#Trita Parsi

The blockade, from the Saudi perspective, is what contains the Houthis and prevents them from taking full control of Yemen. It's what prevents them from being able to get more military technology and military means from the Iranian side. So, from the Saudi perspective, this is important in order to make sure that the Houthi problem does not grow. And this is part of the reason why, when, as part of the funeral of the previous supreme leader of Iran, Ayatollah Ali Khamenei, the Iranians sent a Mahan Air airplane to Sana'a to pick up the Houthi officials to fly them to Tehran.

The Saudis tried to prevent it. They couldn't. But then, on the return, they did strike at the airport, which is, you know, the initial phases of this new round between the Houthis and the Saudis. And it was essentially them believing that the Iranians and the Houthis were using the current conflict, and at the time the MOU was still in effect, and the funeral to push the limits and essentially slowly but surely put holes in that blockade. And they reacted against it. And here we are. It seems like it's backfiring on the Saudis.

#Glenn

I'm just thinking, if I was advising the Saudis, what I would recommend, because this is an all-or-nothing situation. That is, if they attack the Houthis to try to weaken them, they're going to have a more sustained or intensified blockade, and the Houthis can begin to burn down a lot of the energy infrastructure in Saudi Arabia. On the other hand, if they make peace, then the Houthis will not be contained. They will grow much, much stronger. So, yeah, again, what direction to take? I mean, it's—well, the fact that they had this blockade but they hadn't escalated, that looked like the sweet spot they were in, though, which—I take your point—it was quite foolish, I guess, to intercept that one plane, which was linked to the funeral. Of course, it could have been a way of opening up the blockade, but nonetheless.

#Trita Parsi

I think the Saudi perception was not necessarily wrong, that they saw this as a way of starting to carve out some holes in that blockade. But the action that they took ultimately has led to this scenario. I mean, again, if we just take a look at how much worse and complex the situation is now, not just compared to February, but just a month ago, we did not have the Saudi-Putin scenario as it is right now. We did not have a situation with the Israelis doing what they have done just in the last week in Lebanon. And we did not have a scenario in which the US was trying to essentially target Iran's oil infrastructure, but without targeting the oil infrastructure, instead targeting the tankers and blowing up the tankers in response to the Iranians striking at tankers going through the southern corridor.

But that then led to escalation by the Iranians. They have now taken out several bases, or at least struck several bases in Jordan, and then also shown their capability of striking and potentially sinking an American naval vessel, perhaps a destroyer, perhaps something even bigger, in the Persian Gulf, using these missiles that the U.S. knew that the Iranians had, but the Iranians had not demonstrated clearly. And what seems to have happened about a week or so ago was essentially a warning in which they shot the missiles above the ship. It exploded above the ship, did some damage. The ships vacated the area. And it seems to have been a warning by the Iranians to show what they can do, but they're choosing right now not to do it.

I spoke to a former U.S. official, senior official, who said that the only reason why the Iranians have not sunk an American ship so far is simply because they have chosen not to do so. It has nothing to do with whether they have the capability or not. And I'm worried that, once again, Trump has pushed himself into this information vacuum in which he is drinking his own Kool-Aid. He kept on tweeting things that suggested that the Iranians are about to cave, whereas reality is not at all pointing in that direction. Yes, the U.S. may have gained some leverage there by opening this trade somewhat, but has it changed the strategic picture? And again, I think the assessment at this point has to clearly be: no, it has not.

#Glenn

I think Trump maybe makes a mistake assuming that his entire staff works for him. That is, I think there's a lot of competing interests there who try to influence him in a big way. But as you say, all of this has to be connected to the Iran war. And we see the attacks now intensifying. The Iranians, as you said, they also announced this, or will announce this restrictive zone policy. They show that they have the capabilities to strike the U.S. warships. I guess that's an indication that they're prepared to take that one step up the escalation ladder if the U.S. chooses to. But also the missile attacks on Jordan. I mean, you saw the sky being lit up with all these intercepted missiles, which the U.S. is in short supply of, and NATO also needs to fight the war against Russia.

So it's really—this just goes from bad to worse very, very quickly. But how do you see the Iranians, or how might the Iranians now take advantage of this new strategic situation? Because suddenly everything very quickly turned to their strength. And again, the Iranians I've spoken to, they were making the point that we have the ability to sink this U.S. warship, if we want to, but we save it for later up the escalation ladder. You never know if this is just, you know, big talk or, you know, portraying oneself to have a greater capability than one actually has, but it appears to be true.

#Trita Parsi

Certainly. I would say, and I think I may have mentioned on your show as well, that conversations I've had with Iranian sources throughout all of this, as this narrative intensifies in media, was there starting to reach some sort of hysterical level of, you know, Trump almost has won the war, that I did not detect the slightest sense of panic on the Iranian side, not even a significant sign of worry, which I found interesting because I have spoken to them in moments and it was very clear that they were worried. You know, in specific moments of this war or the previous war, in which it was not entirely clear where things would go, you could sense it. I did not sense any of that. I sensed something interesting earlier today in conversation. It was actually very interesting. You mentioned something that echoed it.

You echoed that we have not reached the, I think you said something, the climax of escalation. And it was the same point that was made by someone on the Iranian side earlier today that I spoke to, who referenced this in a worrisome way, saying that on the one hand, yes, many of these developments are benefiting Iranian leverage. But there is at the same time a larger worry, which is this situation can get entirely out of control. That earlier on there was measured escalation. It was not necessarily good or bad, but nevertheless, there seemed to have been an escalation with a degree of control, whereas now the escalation is reaching a point in which the degree of control may be lost or weakened significantly. And that is ultimately bad for the Iranians, even if the developments of the last 24 or 48 hours could arguably be said to be to their benefit.

And I got a very strong sense that there is still a search for some sort of a diplomatic exit out of this, but that there is deep frustration on the Iranian side that Trump increasingly is showing either no interest in diplomacy, because he has made it very clear publicly he doesn't want to talk to them, he

doesn't want his team to talk to them, or alternatively a perception on the Iranian side that Trump, frankly, has lost his mind and that he is incapable of making a deal. And as a result, this investment in diplomacy is somewhat of a waste of time and energy because the capacity on the other side just does not exist. Doesn't mean it doesn't have anything to do with whether you can trust him or not. It's the capacity to make a deal and stick to a deal that has taken a huge blow, at least the perception of it. That's a very bad situation for the US ultimately to be in, but it's also a very bad situation for the Iranians because the Iranians, at the end of the day, don't have the option of just leaving. Trump ultimately does have that. He clearly doesn't seem to like it. And the more he invests in this conflict, the more difficult it will be for him to just leave. But that option does not even exist for the Iranians at the end of the day.

#Glenn

Well, the battlefield favors now the Iranians. They're showing that they're willing to go up the escalation ladder. They have the capabilities to strike these ships. And again, everything seems to change. But at the same time, one hears also some noise from Iran that they are prepared to shift strategy a bit, that is, to go on the offensive. That is, why should it be the prerogative of the US and Israel when to strike? So essentially, Iran, if they see something happening, go for that preemptive strike instead. And now you see some reports that they may have these hypersonic missiles, long-range as well.

I mean, wow. If you were sitting in Washington, or you are sitting in Washington, but if you were advising the Pentagon or whomever, how would this change matter? Because so far it looks like this has been a bit of a luxury for the U.S., if it decides when to go up and down the escalation ladder, is one thing. But now, if it parks too many refuelers or planes or ships, something that will cause concern in Iran, they might actually strike that before the United States gets to play its card. So how does this shift strategic thinking or tactical thinking in the U.S.?

#Trita Parsi

So let's take a step back and look at how this whole thing has evolved from day one. In my view, the United States lost control of this war on day one. They had the plan that this would be over within four days. They would knock out the leadership. The system would collapse. But already on day one, Iran counter-escalated and defined the geography of this war in a manner that took the American side by surprise. So the definition, the contours of this war, how far they would escalate, et cetera, the escalation dominance the Iranians gained already very early on, and I don't think the U.S. really had much control over it up until the moment in which they started to feel, at least, that they had regained control as a result of opening up this front and feeling that some momentum had shifted, even though, as I mentioned earlier on, they confused the tactical development with the strategic one.

But now I think you're also seeing that the Iranians have already shown that not only will they define the geography of the war, and they will go far beyond what they've done before, as we've seen. Also, Egypt has been struck. Now we're seeing what's happening in Yemen, but also the timing of the war, that it will not necessarily be that the U.S. decides when the next round begins and the Iranians are just playing the reactionary game. The war is not over. So any attack by the Iranians at this point is an attack within a war that the U.S. still started and did not end. And I think we saw some of the strikes against Jordan signifying this, but I think the bigger one will come if the Iranians conclude—and their conclusion at this point seems to be in this direction, and very little has changed, including some of the diplomacy that is taking place right now by some of the Arab states—that Trump is inclined to escalate this war dramatically after the midterms.

The Israelis will be part of that war again because now, when Trump wants to go much further, it's okay for him to have the Israelis involved. He didn't want to have them involved in round two for 13 days because the Israelis were not trusted. They would go much further than Trump was comfortable with at the time. But if he has no limits for round three, then he's aligned with the Israelis. And this, of course, will be better timing-wise for the U.S. after the midterms and after the Israeli elections, which may be precisely why the Iranians may themselves initiate round three a week, perhaps two weeks before the midterms, in order to make sure that the timing of the war is also not decided by the U.S. any longer.

#Glenn

I take your point on the concept of preemptive strike. This concept is often linked to discussing the legality of wars. And of course, given the fact that the war never ended, that's not really a topic at all. It's probably better defined as Iran rejecting U.S. escalation control. But the U.S. partners in the region, though, because a lot of them have been hit pretty hard, and now we're going into yet another round—how do you see the willingness to be hit, but also the energy exports? A lot of these countries, their economies are being suffocated. Do you see anyone prepared to try to just pull out of the whole thing by, well, essentially announcing, "No more using our territory"? Something—I know I haven't seen anything of the like—but do you see someone ready to cry uncle and, you know, tap out of this whole thing from the GCC states?

#Trita Parsi

Yeah.

#Glenn

Yeah.

#Trita Parsi

Well, I think the Saudis and the Qataris already have done so. The Omanis from the outset were not in. It's whether the Bahrainis, the Kuwaitis, and the Emiratis would do so. And Bahrain and Kuwait are not countries with a significant amount of leverage. It would be very risky for them. So I think, you know, in the case of Kuwait, I don't think they were happily going along with this at all. I think they simply didn't have much of a choice. And, of course, Bahrain is not seen as an independent country by most analysts in the region anyway.

So I don't see anything happening on that front because it's not that these countries necessarily want this. It's that these countries don't have the capacity to push back against the U.S. in a forceful way. But it touches on a more—or a different—point, which is that most of the diplomacy so far has been conducted by countries in the region who have a stake in stability, who have a stake in preventing this from going too far, have a stake in preventing it altogether, of course, and who have actually really stepped up. They've been very creative. They've been very energetic under the worst circumstances.

They've still tried. They've not given up. And I think we should give them a lot of credit. And that includes Pakistan, of course. But the reality is that none of these states had much leverage over Iran, and certainly not much leverage at all over the United States. And I think that creates a significant drawback for their capabilities, in the sense that they can mediate, but they can't pressure. The one country that could—they may not be as experienced on the mediation front, but they have leverage—is actually China. China has leverage over the U.S. China has leverage over Iran, for sure.

And China may end up developing the interest to actually step in. I'm not saying that they have it right now. Their approach is to stay out of these things. It's paid off extremely well for them. They have safeguarded global energy market stability by, as you pointed out earlier on, adjusting their demand and purchases of oil in order to make sure that it didn't go too far above 120. But if we're looking at a round three with almost unlimited escalation from both sides, the U.S. side will strike energy pipelines and infrastructure in Iran, critical infrastructure, desalination plants. The Iranians will retaliate. They will do so against GCC states.

They will do so against Israel. Some of the groups aligned with Iran will enter the war much more actively than we've seen before. Then that is going to create a massive problem for China as well, given what it will do to energy markets. And that may actually push them in the direction of contemplating, at a minimum, stepping in and trying to do something. And I think the leverage that China has over the two is crucial, not just in order to get a deal, but to sustain a deal so it doesn't end up becoming like the MOU, where it lasts five, six weeks and then it collapses. That's what the Chinese did between Iran and Saudi Arabia. And it wasn't really just getting the deal.

It's the fact that neither side wanted to violate the deal because of their fear of what that would do to their relationship with China, and both sides were aware of the other country's reluctance to have tensions with China. And as a result, the Chinese role helped sustain the deal, and has been

sustained for several years now. And I'm not hearing any voices on either side questioning the deal or saying we should get out of this deal. So if you want to not just get to the MOU and make sure that the MOU actually survives, both sides may come to the conclusion that China is necessary. I'm not saying either one of them is thinking along these lines right now, nor am I saying that China is. But when you take a look at the landscape and ask yourself, who could step in and put an end to this madness? There's few other names except China that come up.

#Glenn

Yeah. No, no, that's fair. I'm just thinking... For the Chinese, it depends what kind of peace it is, though, because if the Iranians are in a position where they can finally push the U.S. out of the region versus Iran being defeated by the United States, and any deal that allows the U.S. to go back to the old status quo would, in the long run, possibly be not in the interest of China. But, of course, if this continues to go up the escalation ladder, I think the Chinese would—well, they would also be affected quite unfavorably. The elephant in the room, though, we haven't really discussed, is Israel. How long will it sit on the—well, it's not really sitting on the sidelines. It's quite active in Palestine, Lebanon, Syria. But did you see them getting directly involved now against Yemen or Iran? No.

#Trita Parsi

I think that in a third round, if it does occur, which I unfortunately think at least has an 80% chance, unless something happens in the next six, seven weeks, I find it extremely likely that the Israelis will be involved. And this time around, the Israelis will go much further than they did last time. Remember, it was the Israelis that struck the oil refineries outside of Tehran that caused people not being able to breathe the air there for two or so days. It was the Israelis, probably in combination with the Emiratis, that struck the desalination plant on Qeshm Island. The Israelis have always wanted to go much, much further than the U.S. did. And again, this is part of the reason why they were not involved at all in round two. The U.S. wouldn't allow them to.

But if Trump is under the false impression that he has tried everything—he's tried diplomacy, in his mind, he's tried sanctions, he's tried what, within this context, would be more limited war—but the one thing he hasn't tried is the full-scale war, the Israeli option of war, to just go all out. If that's where his thinking ends up after the midterms, then I think the Israelis will be on board, and they will be very active. And again, this is part of the reason why the Iranians are striking Jordan right now. Those bases are needed to protect Israel in a third round of war, in terms of shooting down Iranian missiles. So taking them out right now is paving the way for the Iranians to be able to be more effective in their strikes against Israel if the Israelis decide to enter the war.

#Glenn

Well, it would also make sense as a sort of deterrence against Israel because obviously they're watching this, knowing that they would be very vulnerable if Iran has already softened the targets in

Jordan. But if the U.S. unleashes the Israelis on Iran and we go towards this all-out war where desalination plants, all energy fields, Kharg Island, everything is now being attacked, how do you expect the Iranians to respond? Because then restraint would no longer have any purpose on their side. I mean, why not strike a U.S. warship? Why not an aircraft carrier or desalination plants in the Gulf states? I mean, where do you see the Iranians going after this?

#Trita Parsi

Let me just say one thing on the Israelis. I don't think the Israelis can be deterred as long as the U.S. is willing to go back into a third round and escalate it further. Then the Israelis, at least as long as Netanyahu is prime minister, which he may very well be after the October elections, are willing to accept those costs as long as they have the U.S. fully engaged in war, because they know very well that they will likely never get a chance again to have an American president willing to go into an all-out war with Iran. So under those circumstances, what the Iranians are doing in Jordan will not be a deterrent for the Israelis. They will happily risk all of that as long as they know that the U.S. is fully in on the war.

When it comes to what the Iranians may do next, I think it's very important to note the Iranians could have gone after ships, perhaps even sunk one, and instead chose to do something else. I mean, they're slicing the salami here in terms of being very calculated and careful how they choose to counter-escalate. And the Houthi option may actually have ended up working better than they expected, because it is counter-escalating, it is putting pressure on the U.S., but it is not providing Trump with some sort of a pretext or a massive amount of pressure from places that may not be pressuring right now to escalate the war with Iran.

But for instance, if the Iranians strike and sink an American destroyer, kill or wound hundreds of American soldiers right a week before the elections, I think the overwhelming amount of pressure will be for Trump to do something very, very dramatic against Iran. But the Iranians may be able to achieve the same amount of damage onto Trump through what the Houthis are doing now without any of the risks that they would be faced with if they struck an American ship. So I think the Iranians are looking at those options and will exercise them only once the situation is much worse, which, again, may be the case once we get closer to the midterms. But we're not there yet. Thankfully, we will not be there at all. Hopefully, we will not be there at all.

#Glenn

Well, it's with Israel, though. I mean, I can imagine they're in a difficult position, though, because they've now had decades of rejecting any concessions because they've always had this partnership with the United States, which allowed them to use overwhelming force to impose their will. So again, why do any concessions at all? But now that the U.S. is weakening, you know, I would assume that the sentiment is that this is the last chance to transform the region, knock out, really, Iran, as they see it, as the head of the snake. And then now, for the first time in decades, they have Trump in the

White House who's willing to put the U.S. military force towards this end. So they're in this all-or-nothing position. So that's not a great position.

#Trita Parsi

It's not a great position, but it's also a position which, again, I don't think the Iranians think that they can deter the Israelis, precisely for what you said. And just to add one thing, I posted it on Substack a little bit earlier today: a recent poll that was being summarized by CNN showed that in the last eight or so years, Israel's standing in the American public writ large, it's dropped 67 percentage points. In every demographic, it is now negative. And this undoubtedly will impact the politics. The trend line is so clear. And if you're sitting in Israel right now, you're going to draw exactly the conclusion that you said. This is probably the last chance.

Future American presidents are not going to be of this orientation, on the left or on the right. We're already seeing how things are shifting very fast in terms of not just there being a negative sentiment towards Israel, but also translating into specific measures introduced by Democrats on Capitol Hill and supported by some Republicans. We're going to see much, much more of this going forward because it's going to not only be good policy, it's going to be good politics. So if you're sitting in Israel, you're going to try to get as much as you can before the shift in the American public translates into a shift in American politics when it comes to Israel.

#Glenn

Yeah, I'm amazed by how quickly that sentiment shifted. I mean, Israel was, of all issues, really the sacred cow. You couldn't really touch the U.S.-Israeli partnership without, you know, fearing for your professional career, at least. But, yeah, I just have one last question. That is, you and I spoke before about the possibility of the U.S. doing a ground invasion of Iran. That doesn't seem to be in the cards at the moment. But with this new front opening up in Yemen and the huge pressure this puts on the U.S. by shutting down the Red Sea, do you see the possibility of the U.S. using ground forces against Yemen instead? Because I'm not sure if they would be an easier target, but it's better than Iran. Or there's no such chatter, you think, in Washington at the moment?

#Trita Parsi

I've not heard any of that chatter. And remember, Trump did start a war against the Houthis under the advisement of Mike Waltz and Pete Hegseth. And it was a disaster. And after eight or so weeks, he just ended it. Never spoke about Yemen again, except on the day afterwards, he said that the Houthis are a tough bunch of nuts. The Saudis have tried, others have tried. Very few people successfully intervene in Yemen by air or by land. And the reason why the Obama administration just kept on bombing through drones, et cetera, by air was precisely because they didn't want to put troops on the ground in any significant numbers.

I find it very hard to believe that Trump would go in that direction, would take the risk of ground troops, but in a manner that would not deal directly with the key issue he has, which is with Iran, but on a more peripheral issue, because the risks are almost greater and the benefits dramatically lower. Now, having said that, who knows? I mean, it's still the Trump administration, and a Trump that loses, is perhaps humiliated at the midterm elections, perhaps loses both chambers, may be an even more desperate and far more reckless Trump than we have seen so far.

#Glenn

Yeah, now I remember that there was some, when the US began to lose their planes, and at the end of it, Trump had to declare victory and pull out. I was actually in Tehran when he announced this, and I thought it was quite remarkable. But it is an indication, though, that he doesn't want to go down this route once again. But I don't know, I find this all, at times, concerning, though, just this normalization of war. I mean, remember when the US started this in February, how everyone was glued to the screen, how shocking this was. You know, it could be the end of the world, not just the war with Iran, but also with Russia. How does it become normalized? What kept people up at night a few months ago is now just a daily occurrence. And we casually refer to the possibility of using nuclear weapons and nuclear strikes. I mean, it's not healthy the longer this goes on. I think the more we're moving in that direction.

#Trita Parsi

Absolutely.

#Glenn

Do you have any final thoughts before we wrap up?

#Trita Parsi

No, thank you so much. I'd only mention perhaps one more thing, which is there was a lot of talk about the Mecca Agreement earlier on, and I think you and I had a conversation about it, both what it could be and what it could not become, and some potential promises, some concerns. But I think we all concluded at this point it's too early to tell. And at the end of the day, these things only go as far as their credibility allows them to. And now we're seeing Saudi Arabia in this very tough spot, and we're not seeing the Turks intervening. We're not seeing the Pakistanis intervening.

And I think, again, it shows that those kind of immediate measures may not have been fully thought through. And ultimately, any effort here that does not lead us towards some sort of inclusive, indivisible security, and it just ends up becoming some sort of a bloc formation in the region, at the end of the day, is not going to prove itself to be a solution for the region. And even if it has credibility in the sense that the sides actually honor their defense policy commitments, it does not in

and of itself mean that there actually will be peace. On the contrary, I think a bloc formation will only make long-term insecurity more likely.

#Glenn

But sorry for adding another question there. But with the Mecca Defense Pact, I think many assumed that it would be aimed at deterring either Iran or Yemen. But others suggested that it could be to fill the vacuum as the United States leaves the region, that it could evolve into an inclusive security architecture, or even that it could be used to deter Israel. Have you seen anything in the language suggesting what the purpose of this was to begin with?

#Trita Parsi

I do think that it was more looking towards Israel and having some sort of a balance with Iran. The Pakistanis were very adamant about getting the Iranians included because they clearly don't want to have any conflict with Iran, nor do I think the Turks want to, at least not a direct one. But in my view, it would have been better if they, from the outset, had done something that was more explicitly open, and from the outset had tried to bring the Iranians on board. I understand that that's very difficult to do right now because you can't create a defense pact or some arrangement of that kind with a country that currently is at war. But nevertheless, the manner that it was presented created expectations that Pakistan and Turkey now have to intervene against Yemen. And I just find it very unlikely that they would do anything against Iran. And it seems to me increasingly unlikely that they will do anything meaningful against the Houthis at this point.

#Glenn

Well, thanks again. And yeah, always a great pleasure. And I did read that article you referred to about Israel standing in the U.S. So make sure to check out Trita Parsi's Substack, as I do. And thanks again.

#Trita Parsi

Thank you so much. Really appreciate it.