

# Iran HITS US Oil Tankers, Trump PANICS Then THIS HAPPENED | Mercuris & Henningesen

Geopolitical analysts Alexander Mercuris and Patrick Henningesen joins to discuss the latest breaking developments in the US-Israeli war on Iran including: Iran's massive retaliation in the Strait of Hormuz that's shaking the global economy, military updates on the ground, and what the political status of the war is as Trump and Israel waver on their objectives and their ability to fight another day. Follow Patrick: <https://patrickhenningesen.substack.com/> <https://www.youtube.com/21stCenturyWireTV> Alexander Mercuris: <https://www.youtube.com/@AlexMercuris/> <https://www.youtube.com/@TheDuran/> FOLLOW ME ON RUMBLE: <https://rumble.com/c/DannyHaiphong> FOLLOW ME ON TELEGRAM: <https://t.me/dannyhaiphong> SUPPORT THE CHANNEL ON PATREON: <https://www.patreon.com/dannyhaiphong> Support the channel in other ways: <https://www.buymeacoffee.com/dannyhaiphong> Substack: [chroniclesofhaiphong.substack.com](https://chroniclesofhaiphong.substack.com) Cashapp: \$Dhaiphong Venmo: @dannyH2020 Paypal: <https://paypal.me/spiritofho> Follow me on Telegram: <https://t.me/dannyhaiphong> #iran #israel #trump

## #Danny

Welcome, everyone. Welcome back to the show. It's your host, Danny Haiphong. I'm joined by geopolitical analyst and host of The Duran, Alexander Mercuris, and the host of 21st Century Wire, independent journalist and geopolitical analyst, Patrick Henningesen. Gentlemen, thanks so much for joining me today.

## #Alexander Mercuris

Thank you. It's a pleasure to be here, and a pleasure to be with Patrick again, just to say.

## #Danny

Of course. Amazing. Yes, I'm so glad to have you both, because we're doing these daily updates on the war on Iran and, of course, the historic retaliation, which has escalated quite dramatically in the last 24 hours. I wanted to get right to it. While Donald Trump is saying that the United States has won this war, now that we're entering—or getting close to—the second week of U.S.-Israeli aggression, we have a dramatic escalation. Oil prices are rising; they're back at \$100 per barrel, because not only is the Strait of Hormuz closed, but Iran has just struck a U.S.-affiliated oil tanker. I

can pull up the video that Iran released of this in the Persian Gulf—here it is. According to reports, this was done via, I don't know, underwater sea drones or overwater sea drones, but it was carried out using their drone technology.

It was very rapid, very quick. This is one of two tankers that were hit. We also know the Strait of Hormuz is closed, and that's caused a lot of problems—not least the fact that what we have here is evidence of what I was reporting. Despite all these reserves being released—the U.S. released over, I believe, 100 million barrels of its reserves, and 32 IAEA countries released hundreds of millions more—it didn't do anything to stop prices from rising. And Iran has promised they'll go up to \$200 a barrel, which, of course, is just untenable. So, how about we start with you, Patrick? What's your reaction to this latest escalation and what's transpired in the lead-up to it?

## **#Henningsen**

Sure. Thanks, Danny. Great to be with you. On the oil question, I think a lot of the pressure you're seeing on the price right now is from the futures markets. So this is psychological pressure—it's emotion. It's people worried about what's going to happen in two weeks or a month. But nonetheless, the longer this strait remains inoperable, you're just going to see that number go up and up. The reserves they're going to release—look, 400 million barrels of oil sounds like a lot, but the shortfall from the closure of the Strait of Hormuz is approximately 8 million barrels per day. So that's really about 50 days' worth of coverage that this sort of release would provide. They're talking about this in the United States.

They're celebrating this announcement by the International Energy Agency like it's some great manna from heaven. But it's not. It's actually a desperate situation, because you'd want to avoid at all costs having to release your strategic reserves. I mean, the United States hasn't even refilled the strategic reserves it used during the Biden administration so that Biden could suppress the price of gas during the election cycle—which is insane. But that's what happened. So you've got that going on at the same time. There are all sorts of things happening in the international oil markets that I think are very revealing, like the fact that the United States is relaxing sanctions on Russia, for instance, with the sales to India and so forth.

But what's really extraordinary about this—and I'll just round it off here—is that the U.S. is attempting, believe it or not, to proposition the Chinese that, because of the shortfall of oil coming out of the Persian Gulf, they might consider buying U.S. oil and LNG at a premium, of course. So, I mean, the Persian Gulf becomes—the Strait of Hormuz becomes—the Nord Stream pipeline at this point. It's the same type of thing. They want to—not de-industrialize China, but put it into the kind of vice grip, in terms of energy, that they've already put Germany in, as an example, and Europe in general. I don't think this is going to fly at all in Beijing. But you have the same situation with South Korea, the same situation with Japan. So if this is what the brain trust in Washington is thinking—that this is part of some big geostrategic 5D chess plan—I really beg to differ with them. I don't think this is going to go very well.

## **#Danny**

Well, Alexander, I want to bring you in here, and I just want to make sure the audience knows that Donald Trump—despite what's going on in the Strait of Hormuz, the Persian Gulf, and the oil markets, and this massive escalation in the war—he says, and I'm curious if you think this is somewhat of a panic move, that Donald Trump is essentially declaring victory already. Here's what he had to say.

## **#Donald Trump**

Is that a great thing? Well, it's only good if you win, you know. You can only do it if you win—and we've won. Let me tell you, we've won. You never like to say too early that you've won, but we won. We won the bet. In the first hour, it was over. They gave me a list of names from the generals—"Sir, you can pick the name you'd like, sir." I said, "The name of what?" "The name of the attack on Iran, sir." And they gave me, like, twenty names. I'm falling asleep; I didn't like any of them. Then I see \*Epic Fury\*. I said, "I like that name. I like that name."

## **#Danny**

So, Alexander, he's going on about the name of the operation, which began almost two weeks ago, and now here we are, and he's saying we've won. What do you make of these comments, given the context we've laid out here?

## **#Alexander Mercouris**

Well, it's absolute fantasy. It's the sort of statement he's making which— I mean, the longer this continues, the more prices rise, and prices are going to keep rising the longer this goes on. The more statements like that he makes, the more his credibility starts to fall apart. If the United States won this battle in the first hour, then why is Iran still fighting? I mean, it's obviously and completely absurd. And I think it is panic. I think he's finding that the situation is out of control. I think there were expectations that the Iranians would fold much more quickly than they have. I think he didn't expect there would be this massive disruption in global energy markets. And, following on from what Patrick was saying, it might actually be interesting to see what the IAEA—the International Atomic Energy Agency—are saying about the situation, because they've been speaking about the release.

They say the Middle East war is creating the biggest supply disruption in the history of the oil market. Flows of about 20 million barrels per day of crude and products through the Strait of Hormuz have dropped to a trickle. Then they go on to say the coordinated emergency stock release—that's what Patrick was talking about—provides a significant and welcome buffer. But in the absence of a swift resolution to the conflict, it remains a stopgap measure. And they add that, whatever else is done, the crucial point is the duration of the disruption to shipping through the Strait of Hormuz.

So it goes directly to what Patrick was saying. Ultimately, Donald Trump can say whatever he likes, but that's the reality.

## **#Danny**

Yeah. And Patrick, it's not just the Persian Gulf where we're seeing these images. There are reports—well, of course, we know now there are reports of three ships, one of them supposedly tied to or linked with three ships in the Strait of Hormuz that have been hit as well. And Iran has not made any qualms about how it's controlling the flow of traffic. Al Jazeera is saying that up to six vessels have been attacked so far by Iranian drone boats, and they're mentioning sea mines, although we've heard very little confirmation of that from the Iranians themselves. But this is turning into a massive economic campaign in this war that complements the military one for Iran. So I'm curious what you think about this whole situation in total, because I guess I'm getting a bit confused by the differences between the rhetoric from the U.S. administration and the reality. Sure.

## **#Henningsen**

I mean, firstly, you know, I'll start with Trump claiming that the United States has already won the war, or that they've degraded Iran's defenses to such a degree that they're defenseless and hopeless. Iran launched its 37th barrage yesterday of missiles, and by all accounts it was the largest in terms of volume—missiles hitting U.S. and Israeli targets. So how is that possible? If the United States has degraded their missile capabilities, blown up all their launchers, as Hegseth, Trump, and others have been repeating, how is that even possible? So clearly that's not the case.

And what you have to remember is, while this is a different conflict—this is a different war than Ukraine and Russia—you have to remember that for three straight years now, we were told, day in and day out, by the entirety of the Western media, by all the Western politicians across Europe and in the United States, that Russia was on the verge of collapse, that the Russian army was a spent force, that the Russians were out of bullets, that they were fighting with shovels, that the Russians had lost millions of men and Ukraine hadn't lost anybody, and that we just needed a few more weeks and we could turn this thing around—Moscow was going to collapse, Putin was in hiding, Putin was dying of cancer, you name it.

We had it all. And guess what? The opposite was true. So I would assume that we're in a very heavy information war right now between Washington and Tel Aviv. And I'd assume that a lot of what we've seen in terms of claims by the Pentagon or the Trump administration about their successes would be wildly exaggerated if we're going by Ukraine and Russia as a comparison, as a guide. I'd bet along those lines. And if that's the case, then there's a rude awakening coming at some point in the near future. Now, that's not to say Iran hasn't incurred severe losses—militarily, I'm sure, across various branches: naval, air force, army, militias as well, Basij—but militarily.

It might be exaggerated compared to the claims the U.S. is making. So let's just put that out there as well. Now, what's interesting—Alexander mentioned the IAEA, the International Atomic Energy Agency. Iranian media just released a report with leaked documents showing that the IAEA, and specifically its chief, Rafael Grossi, had been fully coordinating with—well, this was released earlier, but—those documents are out there showing they were coordinating with the Israelis. And this has been known for a while. So that basically means you can rule out any negotiations going forward regarding the nuclear program, I think. So we can kind of take that off the table. So what are we left with right now?

We're left, from the U.S. point of view, with regime change, and then also with the ballistic missile program. So those are the three main pillars the U.S. is claiming as justification for this war to begin with. And then you have admissions by U.S. officials like Rubio and others that the Israelis were going in unilaterally, and the United States had to go with them. I'd argue that if that's the case, then the U.S. has no ability to restrain Israel, yet still has to follow Israel into a conflict. That's a major shift, I think, in terms of geopolitics—great power politics.

That's not to say the U.S. isn't a superpower militarily. They are the preeminent military superpower. That's not to say they're not an economic superpower either. They are the preeminent economic superpower, with the dollar as the world reserve currency and the leverage that comes with it. However, from a political point of view, who actually has the most power? It looks like, politically—when it comes to influencing U.S. actions, policy, and the direction the U.S. is going to take, at least in the short term—and using this giant military machine the U.S. has, Israel has leverage over the United States. I think that's undeniable at this point.

So if that's the case, that really kind of changes the calculus in terms of how we're analyzing these types of situations. This is new territory. I mean, maybe this was the case previously with the Bush administration—the neoconservative cabal that steered U.S. policy during the '90s, in the run-up to 9/11 and afterwards—but it's just done in such an overt way now. And it's being admitted by, for better or worse, the Secretary of State and the White House. So that, to me, politically speaking, is new territory and a new conversation that we're entering into here.

And it will be very interesting to see how this takes shape in terms of U.S. politics. We're seeing record levels, I think, of people questioning the special relationship between Israel and the United States. This is a conversation that's happening a lot more openly than it ever has before in my lifetime. And I think, personally, that's significant. I hope that's going to translate into something productive in terms of outcomes—de-escalation in this case—and perhaps a slightly bigger shift geopolitically in the worldview of the United States and its political economy.

**#Danny**

Yeah, yeah. Great points, Patrick. And, you know, Alexander, what Patrick was saying is leading to what seems to be a runaway train here. When you mentioned regime change being maybe one of the few things left on the table, well, it seems like Iran has taken that off the table in many ways. Because here you have the new Ayatollah, the Supreme Leader of Iran, Mostafa Khamenei, giving his first public remarks since he was elected to that position. And the big news from these remarks is that he reiterated the Strait of Hormuz will remain closed, that they're going to continue targeting U. S. bases, and he urged friends and neighbors in the region—those countries surrounding Iran—to get rid of these bases.

And so, amid all this, you have reports now in The Wall Street Journal saying that, given the global implications of the Strait of Hormuz being closed, some military analysts—close to the Pentagon, close to Washington—are suggesting it may require a ground operation to seize the Iranian coastline and reopen it. So, a kind of runaway train happening here, Alexander. What's your reaction to this? It seems like a disaster already in the making.

## **#Alexander Mercouris**

Well, I would have thought so. I mean, a military operation to seize the Iranian coastline, I would assume, is going to require a very, very significant, very large force of U.S. troops. And anybody who knows the geography of Iran, anyone who knows the landscape in some parts of the coastline—the area, for example, around the Strait of Hormuz—is rocky, hilly, and difficult to control. I mean, that's a ground war. That's exactly what the United States has repeatedly said it doesn't want. That's what's unpopular in the United States. And of course, it completely contradicts Donald Trump's current message, which is that victory has already been achieved.

So I think that is a disastrous plan, and I wonder whether, politically, it's even possible. But then that brings us back to the other point—the point about Ayatollah Khamenei, now as the Supreme Leader, saying that the Strait of Hormuz must remain closed, because a military operation, a ground operation, would be incredibly difficult if regime change isn't going to happen. And there's a big report today in The Guardian saying that Israeli security and intelligence officials are briefing that they no longer believe regime change in Iran is going to happen, that the government there appears to be fully stable and completely in control.

Well, given all of these options, it's beginning to look as if we're on the brink of a major crisis with no certain outcome, and with the president's own position in serious jeopardy the longer this continues. Either he holds back, continues the operations as we're seeing them now, the U.S. military itself begins to run down its missile stocks, while the Iranians continue to strike and oil prices continue to rise—that will, in itself, undermine his political position. Or he begins negotiations with the Iranians from a critically weak position, very different from where he was two weeks ago. Or he starts to take these incredible risks with ground operations and things of that kind, which, I have to say, would have unthinkable consequences for the United States and for him personally.

## **#Danny**

Yeah, Patrick, your comments on a possible ground operation—as we observe these developments in their broader context—it reminds me of how, over and over again, the Trump administration seems to corner itself into requiring a more disastrous escalation. And here, the Venezuela option isn't there. They don't have that opportunity. They're not going to swoop in and kidnap Moshe; they already killed Ayatollah Ali Khamenei. It's over. There's no quick way out like that anymore. So here we already have talks—I mean, we've had talks for several days, up to a week now—about a potential ground invasion. But now they're honing in specifically on the Strait of Hormuz issue, in large part, I think, because of the panic. What's your reaction to this possible, maybe even impending, reality that's facing this empire in chaos right now?

## **#Henningsen**

Sure. I mean, I would say any kind of ground operation is just strategically a nightmare—hugely problematic. A D-Day-style coastal incursion, for example, puts your back against the wall. Iran has the high ground, especially with the topography and terrain around the Strait of Hormuz, as Alexander was saying. But even beyond that, setting up encampments and maintaining supply lines deep into Iranian territory would be a major problem. Any encampments are going to come under drone and missile attacks inside Iran—that's just going to happen. And that's not even to mention the problems they'd face engaging Iranian forces on the ground.

And Iran's special forces and Quds forces are formidable fighting units, as they proved in the battle against ISIS—which a lot of people forget—led by, guess who, General Qasem Soleimani, whom Trump assassinated in January 2020. But I think any ground action by the United States would have to come with some kind of objective. The obvious one, from the U.S. point of view, is that there's a lot of pressure on them now, and that pressure will only increase to do something that would help open the Strait of Hormuz or allow tankers to be escorted through that waterway.

So anything short of that, I think, is going to be problematic and won't achieve much. Donald Trump is big on optics, okay? And nothing says optics more than the Navy and naval action. If you notice, the United States has kept its naval assets in a standoff position, quite far from Iran, relatively speaking. And their support base, where the Fifth Fleet was stationed—the base in Bahrain—that's more or less, I think, inoperable and possibly not even fully staffed at this point.

And the other bases that would provide support for any kind of naval action by the U.S. are not operational in the Gulf—not to the degree they were before this conflict started. So the comments by the U.S. Energy Secretary, Chris Wright, are very revealing, because he's being pressed by the U.S. media, who are quite engaged on this issue, asking, you know, will the U.S. Navy be able to escort tankers through the Strait of Hormuz? And he said, well, that could happen soon, but not now—most likely by the end of the month, he said recently when speaking to one of the major U.S. networks.

So that will be the end of March. So what's going to happen in terms of the oil markets between now and then? Look at the calendar here, Patrick. The pressure would be immense by that point on the Trump administration to basically wind this thing down. By the end of the month, you're definitely going to see futures calls over \$150 a barrel, without a doubt. And what's that going to mean in terms of inflationary pressure? I mean, right now in Southern California, we're looking at \$5.40 a gallon—okay, that's San Diego and Los Angeles, \$5.40. In Arizona, we're looking at about \$4 per gallon. So on the West Coast of the U.S., it's very expensive—cheaper on the East Coast, for obvious reasons, in terms of supply chains and availability.

But nonetheless, across the country, that's a hell of a lot of pressure. So I don't think they're going to be able to pull this off in terms of using the U.S. Navy to escort. The mining of the Strait of Hormuz and all these other factors all contribute to the final conclusion, which is that this is a very difficult problem to untie for the U.S. right now. And if they're going to try to do this through brute force—U.S. air power continuing to hit and hunt down Iranian naval assets—I don't think it's that simple. I don't think it's that simple. And they have other problems as well that they have to deal with, with regard to Israel and managing the barrages that are hitting Tel Aviv, as well as other U.S. facilities in the region.

So, listen, this is hugely complicated. This is a great victory for Iran, because what Iran has done very cleverly here is bring the conflict to the world. Iran has brought the conflict to the world. They're not isolated or backed into a corner. From that point of view, they have incurred heavy losses and paid a huge price for what they're attempting to do, which in the end will be to evict the United States from the region—or at least from the Persian Gulf. I think history will look back at this. But getting there is not going to be easy, nor is it going to be pretty for anybody involved.

## **#Danny**

Yeah, yeah. And Alexander, I want to get you in here. We're definitely going to talk about the implications regionally and globally. Iran promised a regional war if they were attacked, and here we are. I mean, even just today—Iran, despite the Strait of Hormuz operation they're waging and, of course, all the missile strikes—I think they're up to 40 now as of speaking. They're still hitting installations, still hitting assets in the region. In Abu Dhabi, they just recently targeted a facility in the UAE housing U.S. military personnel. So, you know, this continues, Alexander. What's your reaction to what Patrick said, and also to what seems to be a cascading disaster in the making?

## **#Alexander Mercouris**

Well, there are a number of things. Firstly, any military operation to seize the Iranian coastline—that kind of ground operation—would take far longer than just until the end of March to prepare. The logistics to do it simply aren't there at the moment. Many American bases in the region have been deserted or heavily attacked. The logistical chains to keep U.S. troops supplied just don't exist. Deploying the U.S. fleet to unblock the Strait of Hormuz would mean bringing warships into danger—

into areas with potential mines, where the Iranians can hit them with drones, missiles, all kinds of things. In some places, we're talking about being only 20 kilometers from the Iranian coastline, so even conventional artillery could reach them.

This looks to me like an enormously complex, very difficult, very high-risk operation. And I wonder whether the planning to prepare for it even exists. I would have thought that, given the way the United States military usually works—where they prepare for operations over many, many months—the timescale that's being talked about, the end of March, looks impossibly optimistic, even if it's achievable at all. Now, Chris Wright is, as I understand it, the U.S. Energy Secretary. I suspect he's talking about an operation by the end of March in order to try to reassure energy markets, telling them, "Look, we're going to open the Strait of Hormuz by the end of this month."

Hold out just a little bit longer. By the end of March—by the end of this month—this problem will be solved. He's already, I'm afraid, shown that he's prepared to say things, or has said things, that turned out to be completely untrue. I believe it was he who recently tweeted, and then deleted, a tweet claiming that a tanker had actually been escorted through the Strait of Hormuz by an American warship. So I don't think he has much credibility here now. For the moment, there are many different people playing in the markets. Many of them are speculating; they're uncertain which way it's going. Maybe these words of reassurance will calm people for a particular day.

But the longer these sorts of reassurances are given, and the less it appears that they're being translated into actual energy flows, the more you're likely to see credibility collapse—credibility in the markets. If you lose credibility in the markets, this I can absolutely say, it's almost impossible to recover it. And that would be a crisis I don't think any administration in recent U.S. history has faced.

## **#Danny**

Yeah, yeah. Well, great points. And now we enter, Patrick—if we could begin with the regional war that Iran is now very much engaged in. It's not just that it's closing the Strait of Hormuz, but last night, as I was preparing for the show, it was reported that Iran and Hezbollah were carrying out a joint and coordinated strike on Israel. Hezbollah just announced a new operation called, I believe, Operation Devoured Straw. And according to some reports—and I'll just play what the scenes were like last night—about 50% of the barrage hit their targets. Hezbollah said they struck military installations inside Israel, especially in the north.

So, Patrick, your reaction to how this has turned into a regional war and where exactly it stands—because there's been massive censorship, of course, about the damage on the Israeli side. Now there's satellite data—I think Planet Labs is delaying all releases of information for at least two weeks for anything happening in the Gulf. So, your thoughts on this and where things really are, because the U.S. and Israel are also targeting civilians, and Iran says about 10,000 civilian sites have been hit. Yeah.

## #Henningsen

Yeah, on the Hezbollah question there—some people are saying it's too little, too late for Hezbollah. But I'll say this: what it shows is that Hezbollah is still active. They still exist, they're still able to fight, they're still able to mount some kind of response. They did abide by the ceasefire for the longest time, but that didn't get them anywhere—only pain and suffering for South Lebanon. Because Israel has an advantage, and that advantage is that the old playbook—the assumption that the U.S. or its allies would refrain from targeting densely populated civilian areas or killing large numbers of civilians—those assumptions are no longer valid when you're talking about war-gaming and these types of scenarios. So the gloves are off, and no one's willing to step forward and restrain them.

So Lebanon—while you could say it's part of the regional war—it's not an independent country. Lebanon is under the full control of the United States and Israel, 100%. What it shows is that, for the first time, you have ethnic cleansing under the threat of death by Israel from the suburbs of Dahia and South Beirut. One hundred thousand people—100,000—have been displaced this week from South Beirut. And Israel has also attacked their encampments on the beach just last night. So, I mean, where is the outrage over this? Where are the sanctions? Where are the calls for an embargo on Israel? It's just unbelievable how this thing is falling apart. So when we talk about the regional aspect of this, to me, the two most compelling areas we can look at—well, three anyway, but two in particular—are Turkey and Iraq.

With regard to Turkey, we're entering a new phase between Turkey and Israel. We have open threats from Israeli ministers calling Turkey the next Iran. So when Israel talks, you should listen when you hear those kinds of statements. Turkey is now being framed, possibly, as a hostile adversary of Israel. As a NATO member, that's quite interesting. So we have to ask ourselves a question, Danny: if Turkey were to hit military installations, carry out a targeted strike, or even assassinate one of Israel's leaders, do you think the United States or anyone in Europe would step forward and condemn Israel for that? The answer is maybe not—maybe not in the current political climate we have. So what does that tell you?

That tells you we now have the potential for great instability in the region. And then with Iraq, the United States has crossed a red line this week. They attacked a PMU base in Iraq. I'm not sure if it was Israel or the United States that actually hit it, but initial reports said the United States struck this base. So what does that mean? You have a fatwa from Ayatollah al-Sistani in Iraq, who is, regionally, one of the top three most powerful voices. And if he calls for mobilization—which he's now framed as solidarity, that everyone must show collective support for Iran in this battle against Western imperialism and against Israel—then that's a major shift.

You also have the leading Sunni cleric in Iraq issuing a kind of fatwa, recognizing that this is now a challenge for the entire Islamic world—that Iran must be defended and U.S. aggression must be opposed. That, to me, is significant, because in terms of mounting any serious action against the

Islamic Republic of Iran, Iraqi airspace and Iraqi territory—including the KRG, Iraqi Kurdistan—are essential. Otherwise, the operation becomes hugely complicated. The Gulf states have claimed they're going to shut their airspace and not allow it to be used for overflights.

Saudi Arabia made a big statement before this conflict, but they didn't abide by it at all. The evidence suggests that both Israel and the U.S. have used Saudi airspace as part of their operations. So, keep a close eye on Iraq, because they could very easily be pulled into some kind of, maybe, Iraqi civil war regarding Kurdistan—maybe even onto Iranian territory if the CIA wants to activate these Iranian Kurdish fighters. Reports say they're threatening to use them to invade the Kurdish region in western Iran. But Pakistan is also very important in terms of the regional conflict here—Pakistan is hugely important.

You're seeing massive street protests in Pakistan in solidarity with Iran. That doesn't surprise—it shouldn't surprise anybody. But what that means is there's going to be some upward pressure on the political system in Pakistan to maybe lean a little bit toward Tehran in their own self-interest. Even India hasn't made any sort of very clear declaration or support for Israel in this conflict. That means India also sees the possible danger and risk of what's happening in terms of regional stability and their own interests in energy supplies. So that's very interesting on the eastern side of this.

So I think, from a regional point of view, it's still taking shape. And we're not even talking about Yemen yet—and what Yemen could do in terms of mobilizing against Israel or U.S. forces in the region. By the way, the last thing I'll say: the pressure release valve for the Persian Gulf is the pipeline system Saudi Arabia uses to ship from the Red Sea, which bypasses the Persian Gulf. That could very easily be disrupted by the Yemenis if they choose to. Can the United States manage all of that? Can Israel manage a five-front war? Maybe not. We'll see. But those are all the things I'm looking at.

## **#Danny**

Yeah, I mean, Alexander, that's a massive outline of the regional situation. What do you make of this explosion of a regional war, which has so many components to it, but every single day we're seeing the results play out? Is this already out of control? And, you know, Iran has laid out its terms—what it wants. I believe the president has three terms; I don't know if you saw those. Yes, I have. And you could talk about that a little bit in the context of its strategy, which is being carried out. We talked before the show—Iran is doing exactly what it said it was going to do, and now we're seeing the results of it.

## **#Alexander Mercouris**

I don't think the situation is out of control. What we're seeing is really a strategy that Iran developed before the war—one they actually announced beforehand. So everything we've seen isn't a situation spiraling out of control. It may look that way to us in the West, but it's actually the implementation

of a strategy prepared and announced in Tehran before this conflict began. The problem is that people weren't listening. And in many cases, I think they were believing far too much of their own propaganda.

So, firstly, they assumed—there was lots of rhetoric about how Iran was weak, how the government there was weak, how it had become weaker than at any point since the 1979 revolution. How Iran was a house of cards—just blow on it and it would all fall over. So eventually that propaganda began to shape some of the decisions that were made, obviously in the United States and in Israel, and, by the way, across the whole West, because all Western governments to some extent have been involved in this. And the same with Hezbollah—we were talking about Hezbollah. In my opinion, and you know, I'm not an expert in these matters, but I think it was entirely sensible for Hezbollah to hold back in the first couple of days.

What Hezbollah needed to do was basically contain an Israeli ground offensive—which apparently they are successfully doing—and then launch their own rocket attacks on Israel once the Israeli air defense was depleted by the Iranian drone and missile strikes. Hezbollah doesn't have the same kind of stockpile of advanced missiles that Iran does. It's a militia, not a state. So it makes complete sense for Hezbollah to hold back up to this point. And again, I suspect this was coordinated. But we had all this rhetoric, all this propaganda circulating after the events of 2024—that Hezbollah was weak, that it had been badly battered, that it couldn't resist, that the organization was on the brink of collapse, that the militia was unraveling, that it wouldn't be able to replace Nasrallah, its former chief.

And now we see that it's fully in contention, it's fully there, and it's operating as well. So again, people in Washington and in Israel got swept along by a lot of the propaganda and rhetoric they were putting out. They ended up believing far too much of it themselves. And now, of course, they're colliding with reality—they've been caught. What we're seeing isn't so much a situation spiraling out of control; rather, it's one where one side has a plan, which it's implementing, and the other side does not, because their plan has failed and they're now trying desperately to come up with something—to figure out what they're going to do in a situation they never anticipated finding themselves in.

## **#Danny**

Yeah, and Patrick, when you mentioned Yemen earlier, I thought to myself—over the last few days, since the Strait of Hormuz closure has really taken off—I was thinking that the reason the Houthis in Sanaa haven't entered yet is because they're actually waiting for the crisis to get so bad that, once hostile parties or ships associated with them try to move oil and commercial cargo through there, they would close it. And that would only intensify the crisis. Then we heard from Iran saying that if they try to find another route for their oil, or if they try to wage an escalation over the Strait of

Hormuz, they would face another strait being closed. And I thought to myself, are they talking about the Bab el-Mandeb here? So anyway, your final thoughts on this before we move on to the last segment?

## **#Henningsen**

Yeah, of course, that would be problematic for the United States. They supposedly defeated Yemen last spring, but maybe they haven't. So they'd basically have to fight on multiple fronts. And I think reports say the United States is very much depleted—in terms of air defense, interceptors, and precision munitions. That's why B-52s are being loaded up at British air bases—U.S. B-52s and B-2s—for high-altitude heavy bombing and bunker busters, and so on, in Iran. So that, to me, is the last thing, the final wave. It's going to take them a very long time to replenish and restock.

In fact, if you look at another big problem the United States has—the reports from South Korea that they're dismantling some of the remaining THAAD systems to redeploy them to the Middle East—I would assume that's for the protection of Israel, most likely. And what that shows is that the entire U.S. protection racket—well, now you can see it's a protection racket. The Pacific posture is a protection racket, because if it were really about countering North Korea, which is the stated aim of the United States for maintaining the level of forces they have in South Korea and Japan, supposedly it's to counter the "crazy dictator" Kim Jong-un and his nuclear threat.

If it was, then they wouldn't be dismantling THAAD systems in South Korea. So everybody knows now. And it's the same with the Gulf. If it was about protecting the Gulf Arab countries, then they've utterly failed in that regard. They've drawn fire to all of those Gulf countries by hosting U.S. bases in every single position around the Persian Gulf. And the thing I point to as well is, if it was about protecting the Arab countries or protecting the oil, clearly the U.S. is not interested at all. Otherwise, they wouldn't have gone down this misadventure path three weeks ago.

What it shows is, if you look at how U.S. forces are activated in these bases, and also the naval assets that were put into place—not only in the Indian Ocean, Diego Garcia, Djibouti, the Red Sea, and the Eastern Mediterranean—you can see the evidence is in. The receipts are in. Task Force One, Two, Three, and Four—all of these were activated for one purpose. In Iraq as well, the bases in Syria and in Jordan, for one purpose and one purpose only: to defend Israel, to provide a defense perimeter, an envelope of protection for the state of Israel. This is what the U.S. is doing—they're not just projecting force.

The U.S. has sacrificed its footprint in the Persian Gulf for Israel. There's no other way to look at it, because it doesn't make any sense from a U.S. imperial point of view that they would compromise and sacrifice all of this investment—all of these various bases, the division of labor that's been assembled around the horn in the region. I mean, why would they basically allow that to be trashed? It doesn't make any sense unless it's not about U.S. interests. Or maybe it was, but now Israel's interests have guided U.S. political decision-making regarding military and foreign policy in this

instance. And I think it's very difficult to argue that that's not the case. In fact, I don't think anyone can make a coherent argument that it isn't.

So that's the other thing this has revealed. It's extremely interesting. And the last thing I'll say on the big picture, Danny—and this kind of speaks to what Alexander was alluding to just a few minutes ago—is that the plans that have been afoot for this region, if we look at the situation in Lebanon, the arc of Hezbollah, the arc of Iran, when the dirty war in Syria was set in motion in 2011, they fully expected—and these are from statements by members of the Obama administration, the intelligence community, and reporting at the time, which I followed very closely, having covered that conflict, also having been on the ground in Syria during the war when I was working as a journalist there.

They fully intended to see the black flag flying over Damascus in 2013. Now, think about that for a moment. When did the black flag actually end up flying over Damascus? December 2024. That's over a decade behind schedule. Don't think for a moment that they didn't expect Syria to collapse. What also delayed that was Russia's intervention in the fall of 2015. That further hamstrung the West and NATO in this dirty war to bring about collapse. And Israel, obviously, is very much—actually, that's the leading force in the destabilization of Syria, along with the U.S.

They fully expected to do this ten years earlier. What happened during that ten-year period? Iran built up its missile program—many generations of drones and missiles, their space program, satellites, proprietary systems—all developed during that decade. So, “the best-laid plans of mice and men,” as Robert Burns famously said. And this is why things are not going to plan right now for the United States and for Israel. This is a very different scenario we're experiencing than the one that would have happened in 2015. And that's one way I'm looking at it from a historical perspective.

## **#Danny**

Yeah, great points. And in the closing segment, Alexander, I wanted to get to the role of Russia and China here, because, of course, a lot has been made in the Western mainstream media recently about this, as the war has gone in what I think is a very surprising direction for the U.S. and its allies. Al Jazeera wrote about how Russia and China helped Iran see the battlefield, because there have been reports in the Western mainstream media about Russia providing intelligence. American officials are telling the Western media that's what they're doing—helping give Iran precise locations of warships, aircraft, and other assets in the region.

And then there was this report, Alexander, with all the reports about the Strait of Hormuz. Let me just fix that—there are reports that a record amount of oil is being exported by Iran through it, and it's essentially all going to China. I don't know if that's 100 percent accurate, but most of it seems to be going to China. So I'm curious, Alexander, if you could talk about the role of Russia and China in this war—their positions and how you've seen this develop.

## **#Alexander Mercouris**

In some ways, this is a difficult topic, because if the Russians and the Chinese are involved in assisting Iran militarily in some way, then that assistance is being provided very much under the surface, in a deniable way. So there's a lot of speculation that the Chinese and the Russians are providing Iran with intelligence support, which might explain why the Iranians are able to stay ahead of the game—where the American bases are, where the American facilities are. I even saw a statement that may have come from an Iranian military official. I have to use the word "may" because there's an awful lot of false information circulating. If this report is true—and I think it probably is—he said that the Iranians know exactly where the Americans are: in the Mediterranean, in the Arabian Sea, on land, everywhere.

They have information about how many troops are in the various bases around the Middle East. If the Iranians have that level of knowledge of the battlefield, it's difficult to believe, given Iran's limitations. It's not a superpower, so it's unlikely Iran could collect this kind of information by itself. It's probably receiving it, to some extent, from China and from Russia. The Chinese, definitely—they've been busy over the last few weeks publishing all sorts of very interesting satellite photos of American bases across the Middle East. You could almost say that's free, upfront, publicly available intelligence being provided to the Iranians. So there's that. But let's put that aside.

I think there's another critical factor, which is that Iran is not alone. The very fact that there are two great powers—China, the world's biggest industrial power, an economic superpower by any measure, and a military superpower as well—saying that they support Iran, and that Russia, a less powerful country but still a great power with formidable forces not far from Iran, shares a potential route to Iran through the Caspian Sea and also supports Iran, is significant. The fact that these countries are prepared to speak up for Iran, to say this is a war of aggression against Iran, and that they're able to provide economic help—all of that makes an enormous difference.

Because if you're in the kind of position that Iran is in, psychologically it matters a lot that you're not fighting a superpower like the United States by yourself. Now, let's say this war continues—let's say it becomes protracted, that it turns into a long-term war of attrition, and we see constant military activity and crises across the Middle East. In that kind of situation, given the stance the Russians and the Chinese have already taken, I think it's very difficult to imagine they wouldn't start providing Iran with more overt military aid—in other words, help with missiles, spare parts, other types of weapons, drones, the manufacturing of drones, and that sort of thing.

And the reason the Chinese and the Russians would do that isn't just because the longer Iran keeps fighting, the more important it becomes to keep Iran going, but because, exactly as happened during the Vietnam War, the Chinese and the Russians, acting in their own self-interest, will understand that this is how they gain leverage over the United States. We discussed this very point in a program we did together on this show some weeks ago, and it seems to me that the logic of that—the calculus of that—is even stronger today, now that the war is underway, than it was when we discussed it.

## **#Danny**

Yeah, Patrick, same question to you. What are your observations on this development, which I think has been understated by the Western mainstream media—reports about intelligence assistance from Russia and, of course, economic assistance, and even some talk of similar kinds of support to Iran? Oh, sorry, you're muted. Hold on.

## **#Henningsen**

Yeah, first of all, on the intelligence question, I think anything in the UAE, Bahrain, and specifically Qatar—I would say, and this is just from my own experience—what I learned when I was in the Gulf, working there, visiting there, and speaking to people now from the region, reflecting on what's happened over the last, let's say, three weeks, is that Iran has incredible intelligence networks in the UAE, and especially in Bahrain, the UAE, and Qatar—maybe less so in the Kingdom of Saudi Arabia, but that's not very far from Iran. And the number of Iranian nationals—and when I say Iranian nationals, I don't just mean, you know, service workers—

These are people in management positions—business owners, even billionaires—based in the Gulf. They have an incredible intelligence network. The mistake the U.S. has made over the years is that they're able to operate quite freely in a place like Dubai. It's like the Switzerland of the Middle East. So I would assume that Iran knows every single location of every CIA station, every Israeli intelligence base—whatever—in places like the Emirates, Bahrain, and Qatar. In terms of targeting and intelligence, it's probably fair to say that Iran has very strong capabilities there. So, yeah, maybe they get some assistance from Russia or China.

Quite a lot could be gleaned, as you said, Danny, just from publicly available satellite imagery as well—no longer available for the reasons you mentioned. So that's the first thing. On the other front, I'd say that, historically, you have to remember something about Iran. It's different from Syria in the sense that the Iranians have this historic suspicion of foreign powers, including the Soviet Union. That has pedigree—it goes way back. Syria didn't have any such reservations because they've been cooperating on certain levels, politically and maybe militarily, with Russia for a very long time. So there's a lot of history there and a lot of overlap in terms of interests.

Not so with Iran. It's very different. Economically, in terms of trading with China and any cooperation there, they have a lot to gain—and so does China. It's mutually beneficial. Russia has made a lot of offers, a lot of overtures, militarily speaking. But what you have to realize about Iranians is that they're fiercely sovereign, fiercely independent, and they've been like this for a very long time. That makes them different in the region from many other countries that, to varying degrees, have come under the umbrella of the United States or the British Empire historically—Pakistan being a perfect example of that. So that's why you haven't seen this sort of, you know, over-coordination.

Certainly, they could benefit from Russian protection, or a Russian no-fly zone, or something like that, in the way that Syria benefited from it. But why it hasn't happened is because, politically, it's a very different environment with the Iranians. They're very proud of their independence, very proud of their sovereignty—stubbornly so—and many critics would say too much for their own good, maybe in a certain respect. So that factor is there in the background, and I think that also might explain some trepidation on the part of Iranian leaders and politicians about engaging more directly in these kinds of military alliances, operationally speaking, with the likes of Russia and China.

## **#Danny**

Yeah, and Alexander, Iran has said, even very recently in the midst of this war, that they don't rely on any other country militarily—they just don't. At the same time, though, given what has already transpired in this war, I take it there are going to be massive global consequences that are, of course, already taking shape. But I'm curious: at this stage of the war, how do you see the world already changing? In what direction, and what does that look like, given that we're now talking about the other two big powers in the world—Russia and China?

## **#Alexander Mercouris**

Well, I think what this is going to do is exactly what the Ukraine war did. It's going to deepen cooperation between the other two great powers—China and Russia. I mean, the United States has just carried out an overt act of aggression, an overt war of aggression against Iran, which is a friend of both of these countries. And they're going to say to themselves, "Well, we have a superpower in the United States that disregards all the rules, conducts aggressive wars, and creates havoc in the international system. We have to deepen our relations and strengthen our de facto alliance with each other. Because, of course, if we don't, then we're next." So I think this is going to accelerate that division we already see in the world.

But as to the immediate geopolitical consequences, it depends a great deal on how this war ends. If the United States is able to claim some kind of convincing victory in Iran—if it breaks the siege of Hormuz, achieves some kind of regime change, or if there's even a collapse in Iran—then it will be seen as strengthening the global position of the United States, at least for a time. Conversely, if it loses, if it suffers a defeat in the Middle East, then the geopolitical effect of that is going to be simply enormous. It will be very, very difficult at that point to dispute that the United States is in some kind of relative decline as a superpower. If it has proved unable to defeat Iran—and by the way, if it's been unable to defeat Iran—then it has no prospect of intervening successfully, militarily, in Ukraine.

I mean, all the talk about backstops for European forces in Ukraine, no-fly zones that some people still talk about—I mean, that all goes to pieces. If they can't crush Iran, they have no chance in Ukraine against Russia. Just saying. But if that happens, then the whole landscape—the whole political landscape of the Middle East—changes, and the whole global landscape changes. Control of oil routes and things like that all changes as well. And then, I think probably even in the United

States itself, you'll start to see a major rethinking of foreign policy. Those people who are advocates of restraint are going to be strengthened. It would be a much bigger disaster for the United States geopolitically than the failure in Iraq ever was.

## **#Danny**

Yeah, well, same question to you, Patrick. How have you seen the world change, or how do you see it changing given where we are in this war now?

## **#Henningsen**

Well, in so many different ways—too many to mention—but the last point Alexander made, I think, is quite poignant. This could be seen as even more profound than the Iraq War, and the debacle that's now recognized as such—and Afghanistan, for that matter. And the simple reason is this: the difference between those previous conflicts and what we have now is that Iran has put to rest the assumption—and the big red line—that the United States has never attacked a country that could hit back. That's always been a red line for the U.S. military. The entire doctrine, the entire posture during their unipolar moment, was predicated on rapid reaction, surgical operations, limited operations—shock and awe.

But it never factored in a country that could actually strike back in any kind of meaningful way. And Iran is the first in history to do that—not only to the United States, but to attack Israel in a meaningful way and inflict real pain on Israel. Israel is a bona fide regional superpower. Militarily speaking, they are the regional superpower. The United States is the global military superpower. So Iran's taking on both of them. The dark side of this is that the United States also has a record in history of feeling that if it's losing, it reserves the right to deploy overwhelming force.

That could come in different ways. The leveling of Pyongyang during the Korean War, the firebombing of Dresden, Hiroshima and Nagasaki—whether through tactical or strategic nuclear weapons—or Operation Rolling Thunder under Lyndon Baines Johnson and Richard Nixon. That's the dark side of this. Would the political pressure in the U.S., combined with Israeli political pressure, be enough to draw a line under this conflict by dropping the hammer of all hammers and making a massive statement—not only to the Iranians but to the world?

And that would result in—I think—I don't know where we'd be in terms of the global conversation at that point. Certainly, we'd be entering a new era where all bets are off on so many different factors: trying to game out World War III, the changing global order, and so forth. The economic collapse that would coincide with this—that is coinciding with this right now, even as we speak—adds another layer. So there are still some unknowns here in terms of what could potentially unfold. And I, of course, would like to see that not happen, and to see this contained within a conventional frame.

If it's contained within a conventional warfare frame, I think the United States will be the loser, simply because the entire region—and even its former allies—have already begun to reevaluate their relationship with the U.S. and the nature of this protection racket that America has been running. And also, the Abraham Accords are dead. The Abraham Accords are dead. They're never coming back. We could bring in a cohort of funerary violinists for the Abraham Accords now—it's over. So these are already profound outcomes. The question is, how are Israel and the U.S. going to react in the face of defeat, or potential defeat? That's still an open question.

## **#Danny**

Yeah, well, maybe I can get both of your final comments on anything we haven't spoken about. But to that point, one of our viewers was asking: can Iran stop Israel if Israel tries the Samson option? This is definitely on the minds of viewers here, and it's certainly on the minds, I think, of a lot of us who are analyzing the situation and seeing how we're getting to the point where wars are becoming—for the United States, for the empire, for Israel, and anyone else following the U.S. along as well—they're coming to this very dangerous point. It's what we've all been talking about over the last decade or so. But, Alexander, any last remarks? And then Patrick, any last remarks as we head out?

## **#Alexander Mercouris**

Patrick is absolutely right. I mean, the stakes for the United States now are enormous. The U.S. could walk away from Vietnam, and it could walk away from Iraq. Its global position was dented, but not fundamentally undermined or damaged. This is completely different. If the United States suffers a defeat at the hands of Iran at a time when it senses that the balance of economic power is also shifting against it—and suffers this defeat in the Middle East—then this is an absolute geopolitical crisis. I mean, nothing, nothing would replace it. And of course, for Israel, it's an even greater crisis.

I mean, Patrick was talking about this ring of bases and facilities that had been created around Israel to protect it. If we have a situation where all of that is brought into question—where potentially the United States withdraws, which is not an impossible or far-fetched possibility in the event of an American defeat—well, where does that leave Israel exactly? And how does Israel, at that point, respond to a local security environment that's profoundly different from what it has known over the last 30 or so years? So for Israel, it's a critical point, a crisis moment as well. And given some of the opinions we've heard expressed by people in Israel, it's very, very difficult—very worrying—to know how they might respond.

## **#Danny**

Yeah. Patrick, any final words as we wrap up here?

## **#Henningsen**

Yeah, and just to add to what Alexander said, if the U.S. were to withdraw from its positions in the Persian Gulf—those main bases around the arc of the Gulf and in Iraq as well—I think they do have an important facility in Turkey, an air force base. But Iran could also extend its targeting perimeter, and that might include Djibouti. That might include Diego Garcia, which is very much in range of intermediate missiles. Iran has the capability to hit Diego Garcia, though they haven't yet. And also Cyprus as well. We can't ignore the fact that Cyprus is an important escape hatch for the Israelis, but it's also a major listening station in the region for GCHQ and the NSA. Israel coordinates and triangulates with Cyprus in terms of signals intelligence and so forth.

So those are all interlinked with Israel's listening and forward communications, uh, detection and surveillance. It's all part of a ring that the RAF Akrotiri and the U.S. base in Cyprus are part of. But if this conflict extends to Djibouti or some of these other facilities as well, maybe that's something the U.S. might be able to manage in a standoff too. Still, it's a very different region once you take them out of the Persian Gulf. Then you have the potential for independent Arab states possibly coming together. I mean, I wouldn't even—personally, if this becomes a war of attrition, if we're talking about a couple of years—this could just be waves of different attacks by the U.S. and Israel.

This could just re-inflate every six months. It could go on for years. It might even end up with a U.S. ground invasion in a couple of years or something like that. But if that happens—if the Gulf states are still able to survive and remain viable—they're going to have a very, very different view of the region's security architecture. So much so that you might even see Saudi Arabia, or some of the other Gulf states, for their own survival, finding it prudent to back the PMUs in Iraq as a kind of predictable and stable bulwark against some of these problems.

So that might seem like something crazy today, but they did back all of the jihadists and ISIS-type elements for Western and Israeli interests before. They waged a war against Yemen at the behest of the United States for many years, and that didn't work out very well for the Gulf states. So they could also change things—maybe some of their interests, the projects they're pursuing, and the people they're backing as well. That would have a profound impact overall, and certainly make life much more uncomfortable for the United States. So it's a possibility. But these are, again, some of the possibilities that might come up in the future.

## **#Danny**

Yeah, well, gentlemen, we'll have to come back together again very soon. This was a great show. I want to make sure everybody knows that both of your individual works are in the video description—Alexander, your YouTube channel and The Duran YouTube channel, and Patrick, your Substack and 21st Century Wire YouTube channel. I want to make sure everyone hits the like button before they go, and I want to thank everyone who supported today. I really appreciate all of you for coming out here.

Thanks to everyone who gave super chats, and to those who couldn't as well. I also want to thank all the moderators, of course. We'll head out of here together. Everyone, hit the like button before you go—it helps keep Alexander and Patrick's voices out there. You can check out their work in the video description, and all the places that support this channel are listed there too. I'll see you tomorrow at 10 a.m. Eastern time with Professor Jiang Sui-Ching, so join me then—10 a.m. Eastern, March 13th. All right, see you then. Bye-bye. There we go.