

# Andrei Martyanov: De-Dollarization Accelerates: Iran Conflict as Global Catalyst

Iran-US conflict analysis: Examines gaps between official narratives and battlefield realities. Discusses US weapons production shortfalls, Iran's escalation dominance, and Strait of Hormuz tensions impacting global oil markets. Explores broader geopolitical shifts: BRICS expansion, de-dollarization trends, and declining Western influence. Questions strategic competence of US/NATO leadership amid potential regional escalation. Highlights Iran's ability to target regional energy infrastructure and challenge maritime trade routes. Analysis suggests conflict may accelerate global realignment, with Iran-Russia-China cooperation strengthening while traditional Western alliances face unprecedented strain. Economic consequences include rising oil prices, supply chain disruptions, and potential end of petrodollar system. Internal US political tensions and leadership credibility concerns compound strategic challenges in an increasingly multipolar world order.

## #Nima

The war with Iran and Donald Trump—here's The Economist coming out with this title saying the war in Iran is making Donald Trump weaker and angrier. They're calling it Operation Blind Fury. And it's so popular in Iran, they're calling it Absent Fury. But Andrei, here's what Donald Trump himself said about the current situation with the war.

## #Guest

Just about everything there is obliterated, including the leadership. Their navy's gone, their air force is gone, their anti-aircraft equipment is gone. We're flying wherever we want, Pete. Nobody's even shooting at us.

## #Nima

Yeah, and just to mention, minutes ago we learned from Iranian sources that an F-35 was hit last night at 2:35 a.m. over Iran. It's one of the stealth fighter jets they have. Andrei, what's happening? The way Donald Trump is trying to present the situation and share it with the American people—does it reflect the reality of what's going on in Iran?

## #Andrei

Anything Trump says is an absolute lie. He's in a state of panic, as is his administration, which today's Pete Hexer rambling completely confirmed. And what can I say? I mean, he just lies—practically everything he says is a lie. Secondly, we can still allow for the possibility, as mentioned before, that

he's so out of touch with reality that he probably believes what he's saying is true, because he's borderline—it's a personality disorder. And we can also see the onset of dementia. Obviously, there are all kinds of signs of that.

There's a bouquet of issues there, and yeah, he lies because this is probably his last chance to prove something to himself—I guess, I don't know. And obviously, it's a catastrophe for the United States, this whole Iran ordeal. Mr. Trump doesn't understand the criteria by which you judge success in war. And what we can see—as you, Sean, the economist, pointed out—as much as I hate that tabloid, they nailed it. It's blind fury. And that fury, again, the United States' fury now, is extremely limited because the U.S. has spent most of its potential, with the exception of some Air Force assets, in this special military operation.

Russia effectively demilitarized NATO and the United States. So now we have Pete Hebson lamenting this morning that, oh yeah, it was Biden. No, it wasn't just Biden—it's also the Trump administration, which continues to support the war in Ukraine. And now we can see the result: they got, for the first time, into a brawl with people who actually have the means to shoot back—and shoot back extremely well. As a result, it's an utter military humiliation. But yes, we have this guy fantasizing about his greatness, while reality, of course—what's happening beyond him—is totally opposite, 180 degrees opposite. Hmm.

## **#Nima**

Andrei, we're approaching more than three weeks into the conflict, and Pete Hebson is asking for another \$200 billion. What's the current situation with their strategy, their weapons and ammunition—Tomahawk missiles, whatever? What do we actually know about what's going on there? Because it's not just about the money; production is one of the main issues. Yeah, it's all about production. Yes, go ahead.

## **#Andrei**

Yeah, you can't explain to some MBA from Harvard that it's not about money—especially to Pete Haxett, who has a degree in politics, whatever that means, and never progressed beyond the psychology and philosophy base of knowledge of a platoon commander at best, you know. So production is a critical issue. We know that in terms of Tomahawks, last year the United States produced 90 of them, and before that, in 2024, didn't buy any. So they're running out of JASSMs really fast, because this is the only standoff weapon they can really use from the air.

It can be carried by B-52s, B-1s, and obviously all kinds of F-18s and similar aircraft. You can't create industrial capacity even if you ask for \$400 billion. And yeah, it's essentially all about corruption in the military-industrial complex—it's about enriching people. The United States is now a generation or two behind the overall trends in industry, air defense, and strike weapons. And yeah, that's what we're seeing now. And Mr. Trump is just lost in his fantasies.

## **#Nima**

One of the crucial issues right now, Andrei, is that the escalation is reaching a point that's extremely important for the whole region—not just in terms of energy, but also food security. Everything is on the table right now. They've attacked one of the most important refineries in Iran, the South Pars, and then we saw a massive response from the Iranians against Saudi Arabia, the UAE, Qatar, Kuwait, and Haifa just moments ago. How do you see the escalation that's happening right now?

## **#Andrei**

Well, we know that Qatar is already down to almost 20% of its production, which is a catastrophe, and they've shut it down now. Essentially, they're not producing anything in terms of liquefied natural gas, and there are all kinds of, as you correctly stated, issues related to things like fertilizers—things that are critical for agriculture, especially in an area that's basically desert. It's a desert area, essentially. And yeah, Haifa—look at it now. Israel is being beaten into a bloody pulp, no matter how they try to cover it up. I mean, it's an absolute catastrophe there, and it's going to get much worse. So yeah, they wanted war. They got war.

And I'm talking about real war—not beating the crap out of the semi-literate, you know, pathetic Saddam's army in 1991, when you had a free hand to assemble yourself. No, this is a completely different story. And yeah, even Politico—as much as I don't like those shysters—you know, they brought up the issue yesterday that, oh yeah, he's losing control. I have news for them: he never had control. That's the problem they don't understand. Iran has escalation dominance. The only thing the United States can do—the only thing the U.S. military can do—is launch something, bomb something. That's it. If it comes down to boots on the ground, it's going to be a catastrophe.

They've basically already censored their videos showing the arriving coffins, because they can't show that. So we're looking at Trump being a political corpse. And who knows what's going to happen? The longer it goes on, the more issues there will be. First, the Pentagon is incompetent—we know that now. And especially with these fanboys screaming, "Oh yeah, they shot down an F-35!" Yeah, they shot down an F-35. What's the big deal? In 2017, Syrian air defense—and it wasn't even an S-300, it was a Buk-M1—shot down an Israeli F-35. But they've talked themselves up so much, and now they're losing reputation-heavy assets, which is catastrophic. I mean, remember THAAD? Oh yeah, the ballistic missile system—it's basically junk.

You know what? I mean, they don't understand modern war. They have no clue that Iran now actually has the capability of maneuvering warheads on their missiles. And yeah, Iran has good recon and targeting—wink, wink, if you know what I mean. It's a military catastrophe for the United States. The only thing they can do—because they're a bunch of cowards in Washington, D.C.—is worry about their political careers. Some of them, if it continues like this, who knows, the 25th Amendment may come into force. You know, that Trump is not adequate—which we can see every day—to run the country, or he'll end up behind bars, you know.

So don't forget, the Epstein files aren't going anywhere. They're still there. And this is, I mean, a cluster coitus, okay? That's what it is. The United States has no resources—I've been talking about this for the second decade now. The United States simply isn't in the business of fighting a real war. It can buy the president of Venezuela—sure, they'll sell out gladly—or it can beat the, you know, Iraqi army, whatever that was, which wasn't a real army. But fighting a real, serious enemy with deep culture, an ancient civilization—just, really, what the hell are you talking about, you know?

So, yeah, if you look closely—as I keep saying this non-stop—Iran is an ancient civilization, not just a country. You know it better than I do; they respect their antiquity. The United States wasn't even in the picture there for another two thousand years, to put it mildly. They respect their antiquity, their ancient Persian civilization. They still carry a huge influence from the Zoroastrian period, you know, and when you look at the structure of Iranian society, for all its flaws—so they killed Khamenei and Larijani. Well, guess what? That only mobilized Iranian society even more.

You can't explain it to Trump, because he's a highly uncultured man—very primitive in his real estate, New York estate, and showman ways. What he's dealing with is something the United States has never dealt with before. And if it comes down to boots on the ground, Vietnam will look like a stroll in the park by comparison. What can I say? Israel tried to bomb the Port of Anzali—Bandar Anzali—yesterday, on the Caspian Sea. Well, first, there are three other ports there that are beyond the range of Israeli weapons—whatever they have, which isn't really their own; it's all American-provided. So if it comes down to boots on the ground, guess what? They're not going to do anything about a possible supply line for Iran on the Caspian Sea. Because, you know...

## **#Nima**

Andrei, the administration is becoming a kingdom of lies. They knew that if they attacked Iranian oil facilities, Iran would respond—because Iran had already said, "If you attack our oil facilities, we're going to hit all the oil facilities in the region." So they knew exactly what the response from Iran would be.

## **#Andrei**

Knowing is not enough. You need to internalize it—that's the difference. I know many things. Am I guided by them? No. And especially when you look at the organism of state governance, you know, how it operates—it doesn't matter what they know if they don't apply it, whatever they do. And again, Trump is under huge pressure, and basically he's owned by Israel. OK, let's face it—it's terrible, but that's just the way it is. The American administration and military circles are infested with Christian Zionists and Israel-firsters, AIPAC people. And those people are extremely incompetent—militarily, strategically. They never were good to start with.

For example, Israel's military mythology has been very carefully constructed by the Israeli media—and by Israeli-controlled media, which is most of them in the United States. The same goes for American military mythology. They've basically become high on their own supply. My first thought about it was that they don't even understand what they're dealing with in the outside world. And again, it was done by carefully choosing weak, backward enemies like Iraq, you know, all kinds of them. And again, you saw it yourself—those idiots still celebrate this, which is a national shame for Venezuela. They're in the retail business of their presidents.

They've been, well, breakers all over the place, you know. So it wasn't really some special, horribly difficult situation, because they sold the president, you know. But in reality, Iran is in a completely different league. And now they run into this, and suddenly everybody says, "Oh, they miscalculated." Name me, basically, an occasion when they calculated it properly. I can give you one occasion—1953—when Eisenhower, being a man of true stature, of scale, and with a military background that was global in nature, understood that we had to stop the bloodshed in Korea. And he was the guy who stopped it.

But then again, comparing Trump to Eisenhower is like comparing me to Einstein or someone like that. It's not even the same galaxy, okay? So that's what you have—you have pathetic kindergarten kids with emotional issues running the United States today. And they're obviously guided by this basically fundamentalist ideology of the rapture, you know, the Israeli-forces version of this scoffed Bible heresy. And as a result... well, the bad cause seldom fails to manifest itself. That was actually stated by Thomas Jefferson, you know. So, what can I say?

## **#Nima**

Andrei, many of the issues they're facing right now are around the Strait of Hormuz. We've learned from the U.S. Treasury Secretary, Scott Bassett, that the interesting thing is they've unsanctioned Russian oil. And he said that in the coming days, we may also unsanction the Iranian oil that's already on the water. You know, this is somehow backfiring on what Donald Trump was trying to achieve.

## **#Andrei**

Well, I mean, today, from the latest reports, more than around 10 million barrels per day have been removed from the oil supply. It'll get even worse in the coming days. No matter how they unsanction—nobody cares, you know? Nobody cares what the United States does. Sanctions on sanctions. If India is afraid or China is afraid, that's their problem, okay? For example, Russia has enough to basically deal with people who aren't afraid and just do their thing. The problem is that it's going to get much worse, and the actual physical oil today—unlike this paper BS that's sold on all kinds of exchanges—is what really matters.

Even that, it's just gross nonstop. We're at about, what, \$127 or whatever on paper—for whatever the name of this UAE base oil crude is. But physical oil now is \$150 and above. So this is a catastrophe. And no matter how the United States tries, it'll sell to Europe, for example, gas and oil at five times the price, which will finish off Europe, which is already finished off. And I don't know. I mean, the United States is basically not only destroying Europe and the Middle East—it's destroying itself now. Because Europe... you know what? People out there aren't stupid, okay? They see this humiliation. We're talking about military humiliation.

People, you know, you have to understand what the propaganda machine in the United States is. Those spinsters spin everything—like, "Oh yeah, Prosperity Guardian." Yeah, it failed. They surrendered to the Houthis, essentially handed it over to the Houthis. So now you have this situation on an even larger scale—an order of magnitude larger. And they won't be able to unblock the Hormuz trade, no matter what they do, because they don't have the resources. The U.S. Navy already stated, "We're not escorting anything." And good for them, because they understand the situation. They have military professionals there who understand operations, who understand the risks. You can't explain that to Pete Hegseth.

He doesn't even have a basic mathematical background to understand how operations are planned. You know, he saw things—he saw those monitors—but he doesn't understand what happens behind those monitors and keyboards. You've got those guys with PhDs and master's degrees in military science and STEM fields operating there. Not that the Pentagon has too many of them, but they still exist. So you can't explain to him, "Dude, do you understand what's happening? Your idea about the rapture and, as you said, 'we're fighting for Jesus,' whatever..." The guy is a complete nut job.

And so Trump surrounded himself with these people because he was controlled—he's blackmailed by the Epstein files. And this issue isn't going anywhere. He's handing over, not victory—it doesn't mean the Democrats will win—but they may take their, basically, the House back, and maybe the Senate. And it would be a catastrophe for Trump, because there could be all kinds of things happening after that—impeachment, even the 25th Amendment, you know, or whatever. I don't know. So Trump wanted his buddy, you know, Lindsey Graham, to actually handle him.

Well, he got handled, all right. And again, you cannot explain to those people what they're dealing with. They're not competent. Take any one of them—they don't understand the military element. Because, well, if you look at military education in the United States, it's almost third world, with some input of funny technologies. But when you look at how the sea ramps are being taken out—not one, two, or three—from their embassy in Baghdad, that's it. Once it's taken out, what do you have? Nothing.

## **#Nima**

Andrei, Pete Hegseth was asked, "If you're so powerful and dominating everything in Iran, why aren't you able to open up the Strait of Hormuz?" Here's what Pete Hegseth—oh, good Lord.

## **#Speaker 04**

You've said the U.S. military has air and naval superiority over Iran, yet we're not escorting ships through the Strait of Hormuz. Why? How did you not plan for that?

## **#Speaker 05**

We plan for it. We recognize it, because ultimately we want to do it sequentially, in a way that makes the most sense for what we want to achieve, and to ensure we're sending the right signals to the world when we do so. So when Chris Wright speaks, or when we speak, it's based on a full assessment of what we're up against—what we want to say to the world, how we want them to see and understand the conflict. It's like this whole idea of the war widening—that's what the press wants to make it look like, like it's widening and chaos is ensuing. No, we're actually closing in on grabbing hold of and controlling the objectives we want to achieve, and how we want to achieve them.

It's called shaping operations—setting the conditions. But when you shape the environment, you don't always announce it. I mean, foolish political leaders and foolish military leaders in the past would hang an exact deadline on it: "Here's exactly when we'll do what we're going to do," or "Here's how long it's going to take us." And then, if you meet that, maybe you meet it—but if you don't, you fail. We know exactly what we're shaping and why. We're sending those signals, working across the interagency. The Strait of Hormuz is something we've paid attention to from the beginning, and the American people can rest assured we'll make sure our interests are advanced—no doubt.

## **#Nima**

Andrei, from the military point of view... is that making any sense?

## **#Andrei**

No, it's some kind of—yeah, it's gibberish. It's just a set of words, not logically or sequentially connected in any way. Semantic BS, semantic soup, you know—porridge, whatever. He just needs to say something. The problem is, Pete Hegseth wouldn't understand the basic salvo model, let alone the embellished salvo equations and how they shape modern missile exchanges. The United States simply has no experience with that. The United States doesn't know how to fight this kind of war. As I already stated, U.S. military doctrine is basically built on baloney fairy tales by Wehrmacht generals about Blitzkrieg. It's air-land battle, air-sea battle, you know. So the only thing, as I already said, they know is to throw as much as they can in terms of standoff weapons.

Tomahawks, JASSMs—you know, they go in, boom. There isn't a single U.S. pilot of the modern generation who ever flew against even the kind of air defense that existed, for example, in Vietnam. Today, again, we talk about this F-35. I don't see what the big deal is. I mean, you enter an air

defense zone, you're going to get shot down. That's what they don't understand. They talk to each other so much, they're so high on their own supply. They've never encountered real opposition. Maybe there's some flying over Iran, which is friendly—we don't know. So these people, I mean, they just don't get it. They don't understand what a modern missile exchange is. They don't understand how it actually works—well, they just wouldn't understand.

Pete Hegseth has no toolkit—like many other people in the Pentagon—for understanding how the Osipov-Lanchester model, which is essentially a Christian model, evolved and became part of what's taught in the real serious academies of the general staff. And how it is, you know, how many inputs you have to put in, so to speak—not some kind of garbage like with Ukraine. You put garbage into the model, you get garbage out. And that's what we have. That's why he has to come up with this set of words, you know, sounds that make no sense. While in reality, no ship goes in, because it would be targeted immediately. Targeting would be developed, and a firing solution would be developed—especially if we believe the circumstantial evidence, because the U.S. Navy, which is correct, is actually acting professionally here.

It keeps its assets about 700 to 1,000 kilometers away from the shores of Iran, because there's an assumption—one that may actually have some basis in reality—that Iran has anti-ship cruise missiles with a range of at least 700 kilometers. And some of them are supersonic. So, if you look at the width of the Persian Gulf and say, "Okay, they have a 700-kilometer-range missile," then look at the width—the widest part of the Gulf is, what, about 250 kilometers? I don't remember exactly off the top of my head, but it's simple geometry. Subtract 250 from 700 and you get 450. That's roughly 450 kilometers.

## **#Nima**

No, no, it should be.

## **#Andrei**

Yeah, it should be in the hundreds of kilometers, but I don't remember exactly. So you have, what, about 400 kilometers at least within Iranian territory, under the cover of whatever air defense Iran has. You'd get targeting, and you'd launch the salvo. Good luck doing anything about it. And, of course, then we have the minefields. We have all kinds of things there, you know. And we have the high-speed boats, which are, again, Trump lies as always—but, I mean, you know, they're hidden in their underground facilities.

And they—judging by the 18 tankers now burning in the Persian Gulf, 18 of them—Iran has no problem, you know, basically doing what it's doing right now and will continue to do so as long as necessary. And again, it's like the famous Russian anecdote: Nikolai and Pyotr went to hunt a bear.

Then Nikolai goes away, finds it, and yells to Pyotr, "Hey, Pyotr, I found the bear! I caught him!" Pyotr says, "Oh, bring him here." Nikolai says, "No, I can't. He won't let me." So that's exactly what's happening here. And now they are in deep— as our good friend Golan Nixon says—kimchi.

And the kimchi is very deep, you know. And—can I say—you have to have a real, serious general staff to understand this. The United States has only commands that plan for whatever they plan, but we know the U.S. Navy is doing the right thing because they need to preserve their assets. However obsolete they are for modern warfare, they need to keep them away. They might move some submarines there, since obviously Iran doesn't have full anti-submarine warfare capability. So they may launch more Tomahawks, whatever is left there. But that's about it. So everything is now back to the only thing the U.S. military knows how to do—the U.S. Air Force bombing something. And evidently, that doesn't go that well either.