

# John Helmer: US-Israel Attack Could Trigger Regional DISASTER

**#Nima**

Hi, everybody. Today's Tuesday, March 24th, 2026, and our dear friend John Helmer is here with us. Welcome back, John.

**#John**

Thank you, Nima. Thanks for having me.

**#Nima**

John, let me start with Donald Trump and the way he was talking about war yesterday. He said that we're negotiating with the Iranians, which was rejected. Iranian officials said nothing of that sort is happening. And here's what Donald Trump was asked by reporters.

**#John**

Iran's foreign ministry says you're not telling the truth about having productive conversations to end the war.

**#Speaker 03**

Well, they're going to have to get themselves better public relations people. We've had very, very strong talks. We'll see where they lead. We have points—major points—of agreement. I would say almost all points of agreement. Perhaps that hasn't been conveyed. The communication, as you know, has been blown to pieces. They're unable to talk to each other. But we've had very strong talks. Mr. Witkoff and Mr. Kushner had them. They went, I would say, perfectly. I'd say that if they carry through with that, it'll end that problem, that conflict. And I think it'll end it very, very substantially. We have very much in mind our partners in the Middle East. We've had great relationships with a lot of them, as you know. A lot of them were surprisingly hit, and I was surprised to see it—and so was everyone else. But we have that very much in mind in the discussions. The discussions took place yesterday; they went into yesterday evening. They want very much to make a deal. We'd like to make a deal too.

**#Nima**

John, what do you make of what Donald Trump's doing?

## **#John**

Well, the most important thing is that he's trying to restore escalation control. You heard him say he was surprised that Iran hit the Arab states, the Gulf states. It's impossible for a president of the United States—given the kinds of intelligence briefings he gets, even if only weekly—to have been surprised. What we know, and what our colleagues on your program and you yourself have pointed out, is that there was no shortage of warnings for weeks and months. The real surprise was their failure—their inability to destroy Iran's capability to retaliate. Principally, their war aims—regime change, decapitation, replacement of leadership, chaos in the streets, failure of anti-aircraft defense, failure to retaliate with missiles—all of that has failed.

And as Ted Postol said a few hours ago, Israel's air defense is now simply non-functional. You can see that in the videos of the sky. So what Trump is doing is trying to say, "I'm in control," and to reassert escalation control when they've lost it. They've lost it in several key areas, and we'll get to those. First, they've lost the Hormuz Strait regime. They've lost the ability to prevent Iran's retaliation, both against Israel and against U.S. bases. The interesting part is, what is he talking about when he says that Witkoff and Kushner were having talks? Now, the hint there—despite Iranian denials that there are direct negotiations, or negotiations "with quotes" of the top man, which was an expression Trump used in that particular set of remarks—is that, on balance, they're indirect.

They're indirect—either through Pakistan, which now plays a very significant role, putting India completely in the shadows—Pakistan or Turkey, possibly Oman, possibly Egypt. Those are the four contenders. They've all raised their hands as mediators. Lots of people do that to gain reputation, to make money. And as we were saying just before we came on a few minutes ago, the \*Financial Times\* in London did the research showing that that speech and the tweet that triggered the so-called elimination of the 48-hour deadline led to nearly \$600 million worth of insider trading on the New York stock markets—both in oil futures and in the stock market index futures.

So Trump is talking to the market—talking to the money—and the money's making money on what he says, as speculation about what happens next or what doesn't happen next. Escalation control here is a military aim, a political aim, and a money aim, and the money gets delivered to his supporters. His supporters put some of that money back into his election campaigns, and so the cycle goes. That's how I would read the first set of remarks. We can come to it in a minute, but the question is: who talks back to him? Iran, on the one hand; Russia, on the other; China, on the other. In what ways are they addressing what Trump said? We can come to that in a minute.

## **#Nima**

I think, John, you've mentioned Turkey, Egypt, and other countries. How do you see the way Russia views the conflict so far? What's the understanding from Russia's side—or maybe from China?

## **#John**

Well, let's take them separately, because they're different—importantly different. Let's take Russia first, because it's complicated, or rather, easier. I know a bit more about Russia. What's emerging is a kind of two-track Russian policy. Let me put it this way: the way to measure China–Russia is to start with what they know—what we all know—are Iran's terms for ending the war that was forced on it, yes? So if we go to Iran's terms, as spelled out very clearly by Ayatollah Khamenei and repeated in statements from the IRGC—let me just run through the main points. You know them very well, but just to remind our readers.

And let's then apply your question to what Russia is doing about—and saying about—those terms. What are Iran's terms for ending the war? First of all, no ceasefire. That's not the issue. It's what we've called, in the Ukraine–Russia negotiations, “root causes.” You've got to address the long-term danger to Iran of a genocidal, expansionist state—Israel—and the Jewish community worldwide that supports it, especially in the United States. Iran can't simply have an immediate ceasefire and then wait for the next round. That's not on. And right now, given the change in the balance of military force and the shift in political power that Iran has enforced in the Middle East, let's say the first term is: no ceasefire; must address root causes.

Second, Ayatollah Khamenei's speech referred to reparations that must be paid for the damage inflicted on Iran. And if reparations aren't paid, then Iran will inflict damage equal to the damage done to it. That's basically a task for the Arab sheikhdoms to pay. They're capable of paying, and they're capable of suffering the destruction. So, reparations or destruction—tit for tat—is the second major strategic aim of Iran in this case. And it's implementing that tactically and operationally in a very careful way, as you can see, for each attack by the Israelis or Americans on targets in Iran.

It then selects a comparable target in Israel or in the Arab states—U.S. bases or facilities, banks, and so on. So, tit for tat: reparations or destruction is number two. Number three, Khamenei said, is revenge. Now, that's very important. It's not often discussed, but obviously, revenge for the death of Ayatollah Khomeini. What's comparable to that? Well, possibly the removal of Netanyahu. And we talked last week about how Netanyahu had an enforced disappearance—he lost control of the prime ministry and still doesn't appear to be in control the way he was before. Now, in the Israeli parliament, he's not dead—that's clear. He's not even wounded—that's also clear.

However, he may have lost power. Would removing Netanyahu through Israeli elections constitute an adequate outcome that Iran might accept? The Knesset elections in Israel must occur by October of this year. We see elections in Ukraine as one of the terms of the Russian negotiation. So, is an electoral removal of Netanyahu one of the possibilities that would amount to something less than

capital punishment—the third term? The fourth term has evolved from Moshe Dehghani's speech to now, and that's a new regime for operating the Strait of Hormuz, so it cannot be used against Iran. Iran has the capability to use that strait, and possibly Bab el-Mandeb, which is controlled from Yemen, to bring the rest of the world that consumes energy products to an understanding that a root-cause solution for the Middle East cannot involve unbalanced support for Israel.

So, a new regime for Hormuz is the fourth term. And the fifth term, Moshe Bachman was very clear about: it's the end of U.S. bases on Arab territory because they threaten Iran and unbalance the region. All right, so now, if we say there are five terms—no ceasefire, reparations, revenge, a new regime for Hormuz, and an end to U.S. bases—we go back to your question: what's Russia saying about these things? Then we'll come to China. Answer: next to nothing. Yesterday, there was a telephone call between Minister Arachi and Foreign Minister Lavrov, and in the communiqué—I'm looking down at the text so I get it right for you—Lavrov, this is the Russian summary that was published about two o'clock yesterday afternoon.

So Lavrov pointed to the, quote, "categorical unacceptability of U.S.-Israeli strikes on Iran's nuclear infrastructure, including Bushehr, which create unacceptable safety risks for Russian personnel—not just Russian personnel—and are fraught with catastrophic environmental consequences for all countries in the region." Well, yes, that's a warning to Israel and the United States: don't hit Bushehr, which was partially struck nearby the other day. Then Lavrov says he noted—and this is the important part—the need for an immediate cessation of hostilities and a political settlement taking into account the legitimate interests of all parties involved, primarily Iran. Well, what does that mean?

Does it mean Russia wants an immediate ceasefire? I'll come to that in a minute, but China seems to think so. Well, if Russia is saying something vague, it ought to sharpen up its terms. Iran's very clear on its terms—we just spelled them out. They couldn't be clearer. If Russia is responding at the ministerial level after a conversation with Arachi, why are we talking about an immediate cessation? An immediate cessation without addressing the root causes is impossible for Iran. So what, then, is the phrase Lavrov has used—and he's used it before, as have other Russian officials—"legitimate interests of all parties involved"? Does that mean Israel? Does that mean the United States?

And what's a legitimate interest? Then the question becomes, if we go back to the Iranian terms, they're not connected. They're vague assurances that aren't properly linked. Then the last point Lavrov and Arachi made was that Arachi thanked the Russian leadership for significant diplomatic and other support provided to the Islamic Republic, including the supply of humanitarian assistance. Well, here's the two-track—and Israel's already warned about it and attacked. The first track is the Kremlin's relatively noncommittal approach, leading the foreign minister to state things like this, which don't address the specifics of the Iranian terms.

Well, when Russia's negotiating with the United States, with Ukraine, and with the Europeans over the Ukraine war, the terms are specific. Why are we fuzzy now? Second track—that's a presidential

idea, that's Putin's idea. Let's have ambiguity, because it's in Russia's interest, since it's at war with the United States and Ukraine, and a major offensive is coming up. Let's note that—not to antagonize Trump so severely that negotiations for peace in Ukraine would be damaged. That's a Russian interest. So let's call the first track fuzzy diplomatic language, unclearly addressing Iran's terms. The second track is military, intelligence, and secret. It involves resupply down the Caspian.

That's why Israel attacked Bandar Anzali, the Iranian port on the north shore of the Caspian Sea. That port has been used by Iran to ship drones and other military equipment to Russia for the war against the United States and Ukraine. It's quite possible the flow has now been reversed, with Russian military supplies moving south along that route through the port. Israel attacked the port. Zelensky has publicly said that the route has been reversed. But let's just say it remains entirely secret—and should remain secret—that Russia is not only aiding Iran for humanitarian reasons, which is clear. There have also been airplane shipments through the Ministry of Emergencies.

Intelligence sharing—sharing of data, live data related to detecting incoming missiles, Israeli and American tech, and so forth—and assisting Iran in retaliation. That's the second track. It's not discussed publicly, but we can discuss it here. It's best not to exaggerate it, though we don't have to downplay it either. The Israelis have made their position very clear on that matter. They believe Bandar Anzali is a significant element of Iran's capability to fight back, and that depends partly on Russia. Of course, there are land corridors through Turkmenistan and Tajikistan, which the U.S. is actively working to block by discouraging those governments from cooperating. That's a secret element. I'm not able to talk about it, but let's... so where are we then?

The answer to your question is, what's Russia doing on Iran's terms? It's assisting secretly—that second track. It's helping to reinforce Iran's ability to negotiate. That's crucial. It's adding to the strategic balance that makes negotiations viable. It's both viable and a deterrent for the long run. But on the first track—presidential statements, whether from Putin himself, Dmitry Peskov, his spokesman, or, better put, from Lavrov—they're ambiguous. They don't say, they do not say, why any negotiation with Iran must address the root causes. Easy to say. It's said about the Russia-Ukraine negotiations, but it's not said here. So we have ambiguous talk that can mean everything or nothing. Now, should I go on to how China responds to this, or would you prefer to ask? Yeah, go ahead.

## **#Nima**

Go ahead about China. It's good to connect both Russia and China, to understand what's going on.

## **#John**

So, just to repeat, we've got Iran's five-point terms. Would we agree? Does our audience agree? Do you agree? They're clear—they couldn't be clearer, right? So... then I went through the Chinese Foreign Ministry's daily press briefing by Lin Jian. I'll just tell you quickly: he was asked questions

about Trump's 48-hour deadline for reopening the Hormuz Strait, and was asked, what's China's comment on that? And then Lin Jian—I'll read it to you because the language is important to understand, for what it means and what it doesn't mean—said: \*The conflict in the Middle East is still spreading and spilling over. If the conflict continues to expand and the situation once again escalates, the whole region will be plunged into chaos. Force will only lead to vicious circles.\*

China strongly calls on the parties to the conflict to immediately stop military operations, return to dialogue and negotiation, and not continue a war that should never have happened. That was said yesterday. I can tell you, Lin Jian repeats himself day in and day out. Let me go through some of that language. The Chinese position, as stated by the Foreign Ministry, often refers to the region being plunged into chaos. "Force will only lead to a vicious circle." Now, this is China speaking. Chaos is not the outcome of the use of force. Do the Chinese remember Mao's famous expression? "Power comes out of the barrel of a gun." Meaning, force changes the balance of power. The balance of power is decisive. Changes in the balance of power—revolutions, wars—do not produce chaos.

They produce winners and losers. I invite any Chinese expert, if there is one in the audience, to explain to me why the Chinese official statements keep referring to "chaos," which is a very non-Maoist term. Second, you notice they're addressing the Iranian terms by calling on the parties to the conflict to immediately stop military operations. That sounds like an immediate ceasefire—it sounds like the antithesis of Iran's terms. Now, we know that China also has a two-track approach. It is assisting Iran in all sorts of ways—in secret, militarily, infrastructurally, and financially. Yes, exactly how? We don't exactly know. But why is the diplomatic statement, as it were, so contrary to the Iranian terms? I can't tell you why, but that's the most important thing I can see in the Chinese response.

So let's leave out India, the third founding member of BRICS, because India has totally compromised itself by aligning with Israel and the United States. We've talked about that before. India is incapable of acting as a mediator any longer; it's not neutral anymore. And worse, India has, behind the scenes, blocked a collective BRICS resolution condemning the attack on Iran. Remember, India's a member of BRICS, Iran's a member of BRICS, but India, behind the scenes, is blocking collective condemnation from BRICS of the attack. So India is not neutral—it's on the Israel-U.S. attackers' side. Russia and China are the principals supporting Iran, and we have this two-track approach, as I've just explained. John, India was somehow convinced that the war was going to...

## **#Nima**

You know, in a short period of time, it seems that someone in the Trump administration—the Israelis—was capable of convincing not only the United States but also all these Arab states, together with India. Correct? Is that your understanding, that they were all together?

## **#John**

It's my understanding that Prime Minister Modi and Foreign Minister Jaishankar were persuaded, first by the Israelis and then by Indian business circles deeply invested in the military relationship between Israel and India, that the war would be short and successful.

## **#John**

And that's reflected in Modi's decision to go to Israel, because there were others arguing it should have been postponed—the timing was wrong. It's also reflected in the language of his speeches, particularly the Knesset speech, which was endorsed by the Jaishankar line: support the United States, support the Jewish lobby, and improve India's bargaining terms for a trade agreement. All of those things have thoroughly compromised Modi and Jaishankar with the Arab states. In addition, the Emirati rulers—particularly Tahnun bin Zayed al-Nahyan—had a particular role to play after the president of the UAE flew to Delhi to sign some defense and other memoranda of understanding with Modi.

In January and February, the Emiratis made a particular effort to convince India, first, that the Indians understood Arab politics; second, that Tahnun understood American politics; and third, that if India aligned in a security relationship with the Emirates, they could, as it were, trump the Pakistani-Saudi relationship and build on the long-term trade corridor across the Arabian Peninsula toward Europe. We've talked about that before. In other words, the Emiratis generated a level of confidence that the Indians fell for—hook, line, and sinker. And then some very, very unfortunate things developed. I'll be writing about that tomorrow.

There is Indian complicity. I'm convinced by the evidence, and I'll put it in writing tomorrow. Modi and Jaishankar were deeply involved in the planning to sink the Dena, the Iranian frigate, which was sunk just 18 minutes—18 minutes—sailing time out of Sri Lankan territorial waters. That was a cold-blooded murder, and the Indian side was not only involved in the planning but also deeply involved in the cover-up of what happened. But that's a smaller issue. It's a serious issue in long-term internal Indian politics—between the military side and the honour of the Indian military, especially the honour of the Indian Navy in such an event—but that's for tomorrow.

That's in writing because the evidence is complicated, and I want people—readers—to understand it and think it over. But in terms of what we've just been saying, India has discredited itself by falling for, as you said, the short war theory. And now they've got to recover. The recovery will cost them more than 1% of their GDP—from the losses of oil, fertilizer, and remittances from the Gulf—at least 1% of GDP. That's \$45 billion at least this year. The costs to India are very serious, and there'll be political punishment for Modi in the state elections, which are coming up in a matter of days, in April—five states.

## **#Nima**

John, yesterday Donald Trump was bragging about winning the war—he's winning the war, he's doing everything. But you can see something happening within the administration. I don't know if you saw the footage of Steve Miller sitting there when Donald Trump was talking about the United States announcing its victory over Iran. And here's the reaction of Steve Miller.

### **#Speaker 03**

There's something going on within the administration. They're trying to cover it up, you know.

### **#Nima**

It doesn't matter how hard they're trying to do it. Donald Trump himself is trying to do his best, you know, to call. But how do you see the administration—the unity within the Trump administration?

### **#John**

Well, I'm very glad you caught Miller blowing. Who among us doesn't do that—out of frustration or just out of breath? I don't think he was bored. It doesn't look like a gesture of boredom; it looks like frustration. The problem for Stephen Miller—and we've talked about this before—is partly his ambition and partly his loyalty. His main loyalty is to the Jewish community he belongs to, and to Israel. The second is his doctrine, which is that Trump wins by achieving effective violence—effective violence internally—by directing ICE into the Democrat-controlled cities, showing force as an effective political tool.

He's failed at that domestically. It's been his ambition to both succeed at using violence internally through ICE and, second, to use violence effectively abroad. Remember, the position of national security advisor in the White House—which occupies a ground-floor office in the West Wing right next to the president—is more or less vacant. The secretary of state, Marco Rubio, occupies both positions, but in my understanding, Miller has had ambitions to take that job from Rubio, leaving Rubio across the road at Foggy Bottom, the State Department. I'd say he's losing his chance to be national security advisor. One doesn't get promoted for losing a war as big as Trump is losing to Iran.

So, second, the ICE expeditions into the cities have been failures and have had to be pulled back. We've talked about that before, and our U.S. listeners understand that very well. For Trump now to do what Miller has recommended—put masked ICE agents at border control, at airports—means that no one wants to fly into the United States anymore. For Miller to have suggested or endorsed Trump doing that is mad. And that comes back to your question. When presidents and their staffs begin to lose their grip on domestic policy and foreign policy at the same time, and they're facing an election—what are we, November 3rd? I can't count—April, May, June, July, August, September, October, November—we're nearly seven months away.

And the campaign isn't showing the kind of presidential leadership in the approval ratings that it should. It should. If everything that Trump says is believable, there shouldn't be this very high degree of fear of inflation—which there is—and that's the main driver of disapproval of President Trump. He doesn't gain anything by persuading people to rally around the flag of a losing war. Most Americans do not support this war, and the polls Trump puts up are rigged so that they exaggerate the MAGA constituency inside the Republican Party.

So Miller's on a losing streak, and I think you caught him blowing over a losing streak. What happens to individual staffers who lose their ambition, whose boss loses his power and becomes a lame duck? The staff of a lame-duck president—believe me, I was in those shoes—you look for another job. You have to. You look for another job. Now, how do you do that if you're Stephen Miller? Well, he can't be promoted to something the president can dictate—president of the World Bank. He doesn't want to go abroad. He couldn't bear being sent to Israel as Huckabee's successor ambassador. No, he can be sent somewhere to make money. But making money in the Trump way requires inside knowledge and belonging to one of the family gangs.

And it doesn't appear to me, as close as Miller has been to President Trump over the first and second terms, that he's especially close to the son-in-law, Kushner, or the sons, or to the Vitkoff family or the Lutnik family. In other words, when a president begins to lose his grip, when he faces lame-duck status, all these families pull apart. The gangs look for different turf. They start to cash in and monetize their returns on power as quickly as they can. I don't know—and others listening may know—what Miller's business future is. But if he's looking at lame-duck status after November, he's looking for a new job, and there may not be too many opportunities. So right now he's blowing hard because he's seeing his ambitions go up in smoke.

## **#Nima**

John, the Wall Street Journal reported that Saudi Arabia has quietly allowed U.S. forces to use King Fahd Air Base, you know, to attack Iran. And in their assessment, Saudi Arabia, sooner or later, is going to join the fight—and they're going to announce it.

## **#John**

That's back to front. Sooner or later, the Saudis will try to pay their way out. They'll keep buying from the U.S., they'll keep paying Iran—they'll figure a way out. And so will the Zayed family. That's how it'll go. And Iran, for the first time that I can think of—maybe you can think of another time—in modern Middle Eastern history, let's say, dominates the success, to put it unpleasantly, of liquidating all the secular Arab leaderships: ending with Gaddafi's murder in 2011 and then the attempted overthrow of Assad almost two years ago. That ends secular Arabism—ends it—and it's left Iran as the last powerful man standing against Israel. The dynamics will be the same for Iran as the sheikhs once exercised toward Saddam, toward Gaddafi, toward the Arabs.

They try to buy safety, buy protection. And I think that, as we began, they will pay the reparations. There's no way, in my view of Arab politics—and I've been out of Arab politics for quite a while—that I can see any capacity to join the fight. And Iran's already shown its ability to neutralize their capacity to do business, their capacity to load ships. All Iran has to do is increase the pressure on Bab el-Mandab and the Yanbu pipeline, and the loading of ships going out of Saudi Arabia with oil, or the unloading of ships coming into Saudi Arabia with food, ends. So I should say the confidence of the sheikhs has been broken in a way that's unprecedented in recent Arab politics.

## **#Nima**

It's not just going to be Saudi Arabia. If they announce that Saudi Arabia and the UAE, together with Kuwait, are going to join the fight, I think that's the way the Yemenis and Saleh will join. They're going to come into the game, they're going to come into the war. That's going to be hugely, you know, influential, in my opinion, for all these Arab states. But on the other hand, John, we have another mood in these Arab states—the mood coming from Qatar. What they're trying to do, just moments ago, they were urging everyone to stop everything immediately, because they're getting hit from right and left. They don't want this war. They don't want to be part of it. And they were not part of that war Saudi Arabia and the UAE had, together with the United States, against Yemen. You understand the background. On the other hand, you see the Omanis. The Omanis are trying somehow to mediate. You see two sorts of moves on the part of the Arab states. Is that your understanding? Yes.

## **#John**

Well, in general, yes. Each state's different. There's always the possibility that the United States could use ground forces to capture the Tunb Islands, which are part of a long-standing territorial dispute in the Gulf between the Arab states and Iran. I don't think that will happen, but I find it odd, as you said, that anyone would report that these Arab states are thinking of joining the fight. They've been in the fight from the beginning. They believed that by joining the fight in the ways they did, they would succeed in destroying Iran semi-permanently. Instead, it would be better to say that, having joined the fight from the start, they're now finding themselves, just as you said, counting the costs of having lost the fight they thought they were winning.

And there are only, as you say, a few ways out of the fix. The only weapon they have left is money. Buying protection is what the House of Saud has been doing—first with the British, and then with the United States at the end of World War II. We could go through each state one by one. Buying protection and counting on protection is what they do. Behind the protectorate's back, people like Mohammed bin Zayed and the others all say to their friends that they look down on the United States. They try to show, at least verbally, how independent they are. They aren't. And Iran has just demonstrated how dependent they are today—just as Gaddafi, Saddam, Hafez al-Assad, and Nasser said about them years and years ago.

## **#Nima**

John, you mentioned the Strait of Hormuz. I think the Strait of Hormuz is going to be the center—the center of gravity for the region's security. How do you see the thinking of these Arab states? Because, after all, they're so dependent on the Strait of Hormuz. They have to understand that, eventually, they'll need to reach some sort of agreement with Iran. Do you think that's part of their calculation right now?

## **#John**

Well, forgive me—I'm just the Moscow correspondent, right?

## **#Nima**

Because they're communicating with Moscow as well.

## **#John**

Sure they are. And Moscow's been rather quiet on the issue of what the regime should be for Hormuz. The structure from Moscow has been—and we've said it many times—that there's a framework of mutual and reciprocal security for the Persian Gulf, which the Russian Foreign Ministry spelled out, I don't know, three or four years ago. The problem with that has always been that reciprocal security in the Middle East requires Israel to come to reciprocal security arrangements with the Arab states and with Iran. And Israel will not. We've seen the Israeli response has been to expand, attack, destroy. So the mutual and reciprocal security pact that the Russian side has been proposing lacks the balance of forces between Iran and Israel that's required.

That's where we are when we discuss nuclear weapons and missile capabilities, which is what Trump has said Kushner and Witkoff are discussing right now. On the Strait of Hormuz, what we see is really an interesting breakup of interests. On the one hand, Iran has achieved a two-channel regime. Clearly, Pakistan, India, Iraq, Malaysia, China, and Indonesia are all discussing directly with Iran—permits, tariffs, navigation courses through the Hormuz Strait, with declarations of identity, vessel registration, and so forth. Some of those vessels, according to the maritime media that I monitor, agree to go into Iranian territorial waters between Qeshm and Larak—I believe those are the names of the islands.

So they actually enter a narrow channel that's Iranian national territorial waters, broadcasting the permit number that the IRGC has sold them for a fee or a favor. So you have a safe shipping corridor that the maritime media are already discussing, and that safe shipping corridor includes the main allies—Russia and China, Pakistan, the Muslim allies or Muslim states—Malaysia, Indonesia, and

Pakistan, with some token offers to India to behave themselves. There are roughly twenty-two Indian tankers—gas and oil tankers, and bulk cargo fertilizer carriers of Indian origin—locked in the Gulf, and I believe four vessels have been allowed out. So you have a friendly corridor.

You then have Iranian vessels that can go down the middle—down the middle because the guardians of the straits accept that Iran's vessels must go out. Then you have the problem for everybody else. It's clear that the European allies of the United States would mostly prefer to negotiate with Iran for safe passage rather than join the United States and Israel in any attempt to force the straits open. We'll see the breakup. I believe Bahrain has just proposed a draft resolution for the UN Security Council to authorize the use of force—I think they call it "necessary means," but it's really a camouflage for force. Bahrain has proposed that the UN Security Council vote on it. Now, let's see if it comes to a vote, and which countries on the Council vote in favor.

I'd be surprised to see anyone French voting for it. The French, the Italians, and the Germans are opposed to using force and seem willing to negotiate with Iran for a safe corridor for their vessels and supplies. That would leave the U.S. It's unclear who else on the U.N. Security Council the U.S. could recruit. But I think, politically, it's too revealing to bring it to a vote, and too likely it would be vetoed by the Chinese and the Russians. Though, as we mentioned earlier, the Chinese and the Russians have been reluctant to cast vetoes against the consensus of the Arab states. This one doesn't have Arab state consensus, but it's a test of who's in favor of force. So, I think that answers your question, doesn't it?

## **#Nima**

Yeah, John, it did answer my question. But the other part of the issue is Donald Trump trying to put a lot of pressure on the Europeans. You know, on one hand, he says that Europe doesn't matter, that NATO means the United States, and they're not really capable of doing much. On the other hand, he's urging them to join the fight in the Strait of Hormuz—by the way, not outside of it—because they're part of the operation. But he wants them in the Strait of Hormuz because, in my opinion, he doesn't want to get Americans killed there. That's why he wants to send Europeans in, to deal with the repercussions, because that's going to bring a lot of problems in the United States. He's heading into, you know, the midterm election. What's your understanding of that—the situation where he's somehow desperately asking Europeans to join the fight?

## **#John**

Well, I think he's just blowing wind, as you showed Stephen Miller doing. It's clear that the European allies—Britain, Spain, Germany, Italy, France, and Greece—have extended their force umbrella to the limit of Cyprus. That's where they've moved their fleets, their arms, their intelligence services, and their commitment. Their commitment is to defend Cyprus against a Hezbollah or Iranian drone attack on the British base areas and on Cyprus, as it's becoming a new Israeli colony. That's the limit of the European allied force. It won't go further.

Because it's already been proved that they couldn't—an alliance involving, again, the Greeks and almost all the NATO countries—they couldn't succeed in keeping the Red Sea open from the Bab el-Mandab coast, a gateway or choke point for running the gauntlet of Houthi attacks. They failed at that. I've forgotten the name of the operation, but they failed at it. They didn't lose any casualties; they just wasted a lot of money, but they proved their incapacity. The British, on the other hand, continued to provide base support, and that's why Cyprus is important. That's the limit of their extension of force. It's easier for them and also more likely to succeed. Each of them faces short-term electoral calculations—they're all political weaklings.

So it's easier for them to negotiate with Iran, and that's what they're doing. I don't see the politics of any of those countries favoring a display of force loss—losing as badly as they now see Israel and the United States losing. They're not mad; they're not irrational. They're trying to calculate, with relatively limited force capabilities, in a situation where they're watching those with maximum force capabilities being reduced to air defenselessness. Well, why would they expose themselves if the U. S. and Israel have already failed? They won't. Exactly what terms they can strike with Iran remains to be seen. But obviously, the more they get involved in that, the more it upsets the United States, and the angrier Trump becomes—for obvious reasons.

## **#Nima**

Yeah. Thank you, John. As always, we learn a lot from your understanding of Russia, China, and the Middle East, and we really appreciate this kind of information that no one else is able to provide us with. Thank you so much.

## **#John**

It's a nice compliment, Nima. But the fact of the matter is that the situation changes pretty dramatically—and that's what revolutions do. Iran is achieving a revolutionary outcome in a war that was meant to destroy it. A revolution, in Middle Eastern terms, takes us into a realm we haven't been in before. We simply haven't been there. I look forward to next week. I think our risk levels—because in the last two episodes we were increasingly concerned that the Israelis, in particular Netanyahu, would attempt a nuclear strike—have shifted. My own view is that Netanyahu has been put under U.S. and local control.

But that doesn't mean he won't try again. The level of risk that I was most anxious about last week and the week before is, I think, now reduced. That doesn't mean the level of destruction and suffering Iran is taking has gone down—that's not so. And I hope our audience appreciates that the second tracks of Chinese and Russian assistance aren't being reflected publicly, and we're nowhere near reducing the level of suffering for Iran or achieving the five Iranian points. Let's see if next week we're a bit closer.

**#Nima**

Yeah. Thank you, John. Thanks. Bye-bye.

**#John**

See you next week. Bye.