

John Helmer: Russia Issues Warning as US–Israel Strikes Escalate

#Nima

Hi, everybody. Today's Tuesday, March 31st, 2026, and our dear friend John Helmer is here with us. Welcome back, John.

#John

Thank you for having me, Nima.

#Nima

John, let me start with the latest news. As you mentioned before coming on, and as you wrote in the Wall Street Journal, there's a new article about this new move—or maybe a new mood. I don't know if we can trust Donald Trump in whatever he's talking about, but how do you see the situation with the war between Iran and the United States? It seems the main issue for Donald Trump right now is the Strait of Hormuz, which wasn't the case before this war started. It's so, so much... Looking at the whole situation with the war, it really shows the insanity of what Donald Trump is doing. But what's your understanding of what's happening right now?

#John

Well, you made the point—the insanity of what Trump is doing. It's an important question, a psychopathological question, and I'd invite our audience to do the same: go to rollcall.com and just go backwards in time. Look at Trump's tweets, look at his statements, and this is basically what you get. First of all, just in summary, the man is now cracking up—cracking up because between March 28th and today, and tomorrow being April Fool's Day, he may reach a certain peak. He changes what he says and doesn't appear to understand the difference between what he says on day two and what he said the day before. What you can also see is that there's no longer any discipline creating consistency in what Trump is saying. So, on the one hand, you get an interview that was given to the Financial Times.

Now, why does the President of the United States call a British, Japanese-owned newspaper that's basically the European business paper of record—more influential in Europe than the Wall Street Journal is in the United States? Why does he talk to them? Because it's, in a way, a statement to Europe, not just to the British. It's a statement to the money markets and the oil and commodity markets, which are reacting to Trump's—let's call it what they call it—volatility in the money

markets. You called it insanity, a psychopathological diagnosis. They're the same thing. Now, what Trump said in the Financial Times interview is—and I'm looking down to quote, to give you and everyone a sense of the way the man's talking—

"My favorite thing is to take the oil in Iran. But some stupid people back in the U.S. say, 'Why are you doing that?' But they're stupid people. Maybe we take Khargai, maybe we don't. We have a lot of options. Now, you could call that an escalation. The market immediately reacts when the FT posts it—they react by driving down stocks, by driving up oil and metals. Then he talks about the waterway, the Hormuz problem. What's he say? He was asked whether a ceasefire deal could be reached in the coming days that would reopen the Strait of Hormuz. Trump declined to offer details. I'm reading from the text of the FT—March 29, the interview was taken. Quote: 'We've got about 3,000 targets left. We've bombed 13,000 targets, and another couple of thousand targets to go.'"

Note, in one sentence there's a difference between 3,000 and 2,000. In other words, the man isn't remembering too well what he just said. A deal could be made fairly quickly, he says, and it was noted in context that the Iranian regime—the new regime for the Hormuz—is in effect. And this is how he describes it: they, meaning Iran, gave us 10, meaning tankers. Now they're giving 20, and the 20 have already started, going right up the middle of the strait. Now, in answer to your question, that's the man describing essentially what the Iranian regime is. Practically speaking, the 20 he's talking about are the Pakistan-negotiated tanker group that was allowed out by Iranian permission for an ally.

Not the Indian government. No, no, no. And yet Trump claims that the 20 is a gift to Iran from him. Now, that's entirely back to front, but it does show the importance of Pakistan to both Iran and the United States as the intermediary in this kind of indirect negotiation. So, in a sense, what Trump's saying is, "I might be able to agree to the Iranian concept of a control regime for Hormuz, but whatever we come to, practically speaking, I'm ready to delegate—or leave—to Pakistan, the Europeans, and everyone else, including the Indians, to negotiate." So the Strait of Hormuz opening is no longer something Trump's going to force.

Now, that's something the Wall Street Journal reported—we're skipping from March 21 to today, March 31. The Wall Street Journal has been fed the line that, and I'm quoting, President Trump told aides he's willing to end the U.S. military campaign against Iran even if the Strait of Hormuz remains largely closed, administration officials said. In other words, administration officials are now leaking to a U.S. financial markets paper, and that's important. These folks are now speaking through Trump's mouth to the markets. They're worried about the markets. Trump is losing, as it were, cognitive control. But the message is coming through from others into the market through the Financial Times and the Wall Street Journal. Hormuz is off—off the negotiating, as it were, diktat of the United States.

Now Trump is saying—because his people are saying—we can, as it were, hit another 2,000, maybe he means 200 targets, and then we'll pack up and go home. That's what it's beginning to look like.

In between that, he held a little airplane press conference, I think on the way up on Air Force One from Miami to Washington. And then—so to come back to a specific answer where he's responding to your question, Nima—he says on the airplane, March 29, after the FT interview: "Has the Iranian side made concessions? Can you identify those?" was the reporter's question. Trump: "They're agreeing with us on the plan. I mean, I'm quoting his exact words. We asked for 15 things, and for the most part, we're going to be asking for a couple of other things. And just to prove that they're serious, they gave us all these boats." He means the tanker exit for Pakistan.

#Nima

Hmm.

#John

When I talked about four days ago, a present—I said they gave me a present—but I didn't think I was at liberty to say what it was. What it was, was eight plus two—ten massive boatloads of oil. And today they gave us another present: they gave us twenty boatloads of war. And I'm just quoting what he said. That starts being shipped tomorrow. He got "oil" and "war" mixed up. But we're having very good meetings, both directly and indirectly, and I think we're getting a lot of very important points.

Now, Trump isn't talking to the market. He's arranged with his aides to go back to the plane and talk to the American press. Why? Because public approval in the United States is falling sharply for Trump—mainly because of his handling of Iran and inflation. So, short answer, summing up: Hormuz no longer appears to be the choke point for Trump to exit. And then the question becomes, what are the other terms—what he called "the fifteen," and what Ayatollah Moshavah Khamenei called "the five points."

#Nima

Yeah. John, the other reality of what's going on in this war is about the ammunition and the air defense system of Israel. It seems that Israel is under a lot of pressure, not only from Iran but also from Hezbollah. When Donald Trump decided—he's asking, by the way—he's asking Poland to send their Patriot missiles to defend Israel. And Poland's refusing. Poland is refusing. Exactly, Poland was refusing to send them. It seems they're literally running out of air defense systems, you know, interceptors. That's why Donald Trump is changing his attitude. It's not because he's in a comfortable position to go to war with Iran. The numbers just aren't there for him. That's why he's changing his mindset. Is that the case?

#John

Yes, that's the case. But let's add more to what's going on. It's becoming a catastrophic mix of factors working against Trump, Netanyahu, and their calculation that they could win a short, ruthless decapitation war. It's hard for me to remember—maybe there are those on your lineup who can. I won't say who's the oldest member of your team. Is Charles Freeman older than Ray McGovern, or me, or whatever? Let's put it this way: I cannot remember a miscalculation as strategically large as the one the United States has made in this particular short war. The calculations that went into the Vietnam War, the calculations that went into MacArthur's overconfidence in Korea—they took time to evolve.

They were very costly—we know that. We also know how the Vietnam conflict ended in defeat for the United States, and how the Korean conflict ended in a stalemate, which was not a victory. I cannot remember a president, his staff, his ministers, and the Joint Chiefs of Staff imagining and calculating that they could, within three to five to seven days, destroy the Iranian leadership and the regime's capability for air defense and retaliatory attack—missiles, drones, and other weapons. They have totally miscalculated. Let's leave aside the calculations they advertise: "We've hit 13,000 targets." We just quoted that. Hegseth goes on with it. Cooper at CENTCOM gives you a daily update, and so does General Kane at the Pentagon.

The miscalculation is of strategic enormity. Since they've been surprised—even Trump admits to being surprised by the failure—the others don't admit to any mistake. They don't acknowledge that Israeli superiority has been, as you say, destroyed by the collapse of their air defense. All the evidence shows they made a huge mistake and can't achieve their war goals. And that's happened in an incredibly short period of time, as wars go. Let's put that on the table. But what are the other factors? Yes, you're right—they're desperately short of the capacity to withstand, to defend. Not to attack anymore, but to defend. And Poland is saying no. South Korea said yes.

But once Poland says, "We need this stuff to defend ourselves," as if the Patriot system has a proven record of defense next door in Ukraine—it doesn't. People will follow the Polish lead, not the South Korean. But in any event, what else is happening? Well, as I mentioned a few minutes ago, Trump's job approval rating in the United States has begun to significantly worsen. There were three days from the start of the war, February 28th, when there was just a two-percentage-point increase—very tiny by American presidential war-making standards of approval. But it's now moving into disapproval. We're now up to—well, I'm looking down at my RealClearPolitics summary of all the polls.

We're now up to a gap between negative disapproval and positive approval that's risen to 16 percentage points. When we started a couple of weeks ago, on February 28th, we were down at 12 and 11. We're now way beyond the margin of statistical error. So if you're a technician advising the President of the United States—the Chief of Staff responsible for that—you'd say, "Heavens, we're losing in the polls. We're losing the next election." The job approval rating shows—well, the specific polls on the Iran war, and I'm flipping the page—action against Iran disapproval is now minus 13%.

It was around plus three, minus three in the first three days. So the American people have lost patience with their leader.

He has begun to fail in their eyes. What does a politician understand to be failure? Not just the military scores—not 13,000 targets, not the claim that all of Iran’s Navy, Air Force, Army, and military production capacity have been destroyed. The U.S. voter doesn’t think that’s what’s happened. True or false, whatever Trump says, he’s failing in the polls. And the approval—well, the disapproval on inflation—I’m looking carefully at my paper—it’s now minus 30 percentage points. In other words, reality is not just the numbers on the battlefield that you described, Nima, and that’s one of the key factors. The other factor in the U.S. is war weariness after less than four weeks, or approximately four weeks. War weariness—war defeat—in four weeks.

It's extraordinarily fast. And that's why this is the combination—plus something similar inside Israel. Both the technical stuff that Ted Postol is showing on your program, and his analysis of the incapacity of air defense—you can see it, you can hear it, you can read it: war weariness, no longer the capacity to fight two wars, the Lebanon war and the Iran war, at the same time. And now they're facing the Houthi war from the south. So when you add all these up, the arithmetic is now at a 14-year-old's capacity, like President Trump's. The arithmetic is overwhelmingly minus. He's got to get out. He's got to do it quickly. And he does it by making himself sound violent and aggressive and ready to do the opposite. That's how he goes. That's how that man retreats.

#Nima

Yeah, I think these are not good signs for Donald Trump. When you see people at CPAC, the crowd responding to the question of whether they want an impeachment—the crowd chanting, reacting positively, responding that way at CPAC—is this something important for Donald Trump to consider?

#John

Yeah. I'm the Russia correspondent. I'm not the Texas correspondent, and I'm not an expert on the Republican Party—never was. I'm from the state of Massachusetts, not a Republican state. From what I read, from what I understand, I don't have any relatives in that state or in that political lineup. What do we understand? First, there's been a breakup in the so-called MAGA coalition. We've seen some MAGA enthusiasts go the other way. I don't take too seriously a resignation here from one MAGA type or a speech by another. The underlying problem is the votes. When those people speak that way—at the convention you just mentioned, or on U.S. media platforms—what they're doing is appealing to others to vote the way they think. And the arithmetic adds up. Yes, but it's not adding up very quickly.

You've got to look at the Republican Party—votes for Trump remain pretty firm. The size of the undecided block of voters is growing. It's not a sudden switch to the Democratic Party; that's not what's happening, as best I can tell. And others out there who are experts on state-by-state partisan

politics in the United States can correct me if I'm wrong. What's happening is a slow disillusionment among the serious fellow travelers on the Republican side with Trump—people looking to their own future, their jobs, their money, their political prospects, their electability. They don't see Trump's endorsement as being as beneficial as it used to be, and they want to remove the negatives from that endorsement so they can still enjoy the positives before he becomes a lame duck, if that's what happens in November.

#Nima

John, it's not only Poland. We've learned what the response was from Spain and from Italy. Italy said, "You cannot use our bases or our assets to attack." Basically, what Europeans are doing so far is trying to defend Europe—to help the United States defensively. But offensively, they've said no to the United States because they don't feel comfortable with Donald Trump's attitude. And, you know, even with Venezuela, I'd argue Europe wasn't really there. They warned the Trump administration, but after all, when Donald Trump achieved something, Europeans decided not to go against him, because he was doing something in Venezuela that Europe couldn't really oppose the United States on.

They have no leverage in Venezuela. But when it comes to Iran and full participation in an offensive—for example, in the Strait of Hormuz—that would be hugely important, consequential for Europe in the long run. That's why they've decided to choose a different path from what we've seen so far elsewhere. And it's not going to end in West Asia, because he's talking about Cuba, he's not getting out of Iran, he's having this long war, in my opinion, with Iran, and he's talking about Cuba. These are huge questions for the Europeans—what do they want to be? Are they going to be, you know... even we had AfD, the far-right party in Germany, asking the United States to withdraw its troops from Germany. These are important changes happening in Europe as well.

#John

You're right. And each country is different. I can't say that I have any confidence whatsoever in the Prime Minister of Italy to do what she says she means. The same, actually, with the Prime Minister of Hungary, the same with the President of France, the same with the Prime Minister of England, and so forth. I know a little bit more about Greece, the UK, and France. But I think what we can say is that these are, basically, at bottom, strategic allies of the empire—of the United States—and they don't want to be members of a losing empire. First, they do not want Trump to run a war and lose it. Frankly speaking, I don't think they give a damn about Cuba.

I think they would sacrifice Cuba with a blow of their noses. They have no interest in Trump's extension of the Monroe Doctrine—forcing it on Venezuela or Cuba. Russia does. China does. Those Europeans don't. On the other hand, they basically don't want Trump to run wars that he will lose, number one. That's strategic and valuable. On the Ukraine battlefield, and now on the Iran battlefield—it will become so if Trump escalates toward China. Okay? Second, each of the European

states has its own special relationship with oil from Iran, or oil through the Strait of Hormuz, or oil and gas and other financial relationships, let's say, with the sheikhdoms, with the Arab monarchies.

So they don't want a losing war to damage their particular economic, financial, and supply relationships—especially since they're busy sanctioning the supply of Russian oil and gas. That's pretty obvious. So they have their own, as it were, bilateral interest in negotiating an exit from the Strait of Hormuz, with less damage to the Saudi oil fields, the Kuwaiti oil fields, the Qatari gas fields, and so forth. Each of them has a bilateral interest—that is, they have to negotiate bilaterally—and they don't want Trump ruining the capacity of each of them to make their own, as it were, economic relationships with each of those countries. And if the price of that is a deal with Iran, they want to pay it as quickly as possible.

I'm trying to summarize a group of people who don't agree with each other, who fight each other, who are weak and fighting with their own voters. Rather than seeing a general trend against the United States, they're desperate to make sure Trump doesn't lose the United States in the areas where they want to have both bilateral and multilateral influence and benefit. They don't want to take losses. So it's a standard political stunt on each of their parts. Italy—Meloni is about as active a supporter of Trump as it's possible to be for NATO purposes. She doesn't have a problem with the Sigonella air base being used for all sorts of intelligence targeting operations out of Sigonella and other Italian bases.

If our audience wants to understand how deeply complicit and culpable the Italians are, you can go to Italmilradar—italianmilitaryradar.com—and they'll give you daily rundowns of everything coming out of Italy or Greece or from the United States in the Mediterranean, the Black Sea, and that region. You can see complicity, you can see culpability, you can see alliance—an active operational alliance for the United States. If we go northward into Scandinavia, you see the same level of operations with Finland, Norway, Poland, Germany, and the Baltic states, and so on. So I don't see them breaking away from the empire. That's not what they're doing. They're trying to save the empire and save themselves.

#Nima

Yeah. John, what you've learned from Russia—Russia's position so far—is important, because we know that the partnership between Iran and Russia, because of the war in Ukraine and the war right now in the Middle East, is somehow changing. The nature of this relationship has been shifting for quite a long time. And the way Russia sees the conflict now, both in Ukraine and in the Middle East, it seems they're coming to some sort of understanding that Donald Trump is incapable of, you know, reaching—an agreement with any party when it comes to Russia, Iran, or even China. Here's what Lavrov said. Mm-hmm.

#Speaker 03

President Trump said some time ago that he's not interested in international law. He has his own morals and his own understanding of what's right and wrong. Some elements of international life harken back to times long past, when leaders of certain countries were abducted in broad daylight, city blocks were wiped out with biblical cruelty, and children's hospitals were targeted—hundreds of children dying in an instant. Nuclear power plants are being bombed, plants that are supposed to be defended and protected by international law, along with other facilities. And in this situation, nobody but us and our allies seems to care about international law.

#Nima

Yeah, and I think he's so direct—he really hit the target when it comes to your understanding of how Russia sees it, but...

#John

Well, look, you picked exactly the right excerpt to run. Bear in mind, he's reading from a speech, okay? So when a minister reads from a speech, it's been prepared by staff. And the staff have put in some rather fine, interesting, and even funny phrases. When he talked about biblical cruelty, he's not talking about the New Testament—he's talking about the Old Testament, about the Judaic provisions for killing the Amaleks. That's what he's referring to. It's very subtle, but it's there. It's not meant to be funny; it's meant to be serious and critical of Israel. But it isn't said quite that way—not quite. Second, what he's saying is also an address to Russian politics. So when he speaks of the incapacity of the United States to act as a serious, consistent, honorable negotiator, it's an attack on Blinken and Kushner.

It's an attack on their role in camouflaging their negotiations, their so-called goodwill—the plan of attack on Iran last June and the plan of attack on February 28th. And in Russian political terms, in Kremlin politics, Lavrov is attacking Kirill Dmitriev, who is President Putin's specific representative, for negotiating with the United States not simply on economic and investment relations, but on a whole range of issues. Dmitriev keeps negotiating with those Americans. What Lavrov is trying to say in Russian politics here is, "Believe me, don't believe Dmitriev." And that message is directed at the key voter in Russia—the president of the Federation, Vladimir Putin. What he's saying is that you can't rely on those negotiators.

Therefore, you can't listen to or rely on those Russians who tell you—and that's Kirill Dmitriev—that the strategic objective for Russia in negotiating peace with Ukraine is to negotiate peace with President Trump. And so, if you follow, if our audience wants to take a glimpse of the way Dmitriev talks, go to his Twitter account. You can see a stream of posts each day—more than one, more than two, more than three, sometimes half a dozen tweets—in which he's endorsing President Trump as the savior of Russia, President Trump as the savior of common sense in the world, President Trump as the champion of sensible relations with the world, in contrast to the Baltic states, the European Union, Ursula von der Leyen, the Prime Minister of Britain, and so on.

What Dmitriev is saying each day is exactly what Lavrov is opposing. Now, what did he also say in the part you quoted? He said—and I'm looking at the text here—no, I'm sorry, it wasn't the same speech. The previous day, he told French television that their primary focus was on upholding international law, not so much on defending Iran, which is more than an ally but a strategic partner. You made a very good point, Nima. As it's understood in Tehran, the Russian side is changing its attitude toward Iran as it watches how Israel, the United States, and the Arab monarchies have behaved. So I don't think there's any doubt—though it's not a matter of public debate—that the foreign minister is reflecting a change in sentiment.

The view is that the Arab monarchies allowed themselves to be complicit in the attack, in the war. They don't say it. In fact, Lavrov goes further—in a meeting on March 30th, the day after the speech you just mentioned—when he met with representatives from the GCC, the Gulf Cooperation Council, the Arab monarchies. What he said was, and I'm quoting because it goes to your question: Russia calls for an end to the unprovoked and senseless aggression of the United States and Israel against Iran, and wants an outcome with due regard to the legitimate interests of all the states in the region. Russia calls for an immediate cessation of hostilities that are causing destruction and making civilians suffer.

In this context—speaking to the Arab monarchies—Lavrov said that Russia reiterates its unwavering support for the sovereignty and territorial integrity of the friendly Arab monarchies. Note he says "monarchies," not "states," relations with which are of a strategic nature. The unacceptability of embroiling these countries in a war and attacking their civilian infrastructure, including energy facilities, was emphasized. Now, what's going on here? Who in Russia—in the foreign ministry, the general staff, the defense ministry, or even in the Kremlin—thinks that the Arab monarchies were "embroiled," in the passive sense, in this war? It's obviously not the case.

They actively endorsed the war that they thought—like the Indian government thought—would be quick, dirty, but final. It would mean a defeat of Iran. They thought that and failed. The counterattack from Iran against these Arab monarchies, to call them what they are, is the result of Iran's defense strategy. And Russia is assisting in that process. So Lavrov is telling the Arabs of the Gulf Cooperation Council, "We want to be your friends." But there's no doubt that being partners with those who are party to a war against what Lavrov has called our strategic ally is not the way to be our friends, and not the way to solve the region's security problems. So you have a funny combination—I say funny, peculiar. It's contradictory.

Lavrov, on the one hand, wants to tell the Arabs, "We too favor a ceasefire," but the Iranian side doesn't. It wants fundamental, root-cause solutions. "Root cause" means guarantees against the resumption of war, which they don't have. Iran cannot allow the Arab monarchies to go back to the old plans of attacking Iran in alliance with Israel and the United States. Russia is beginning to understand that, and that sentiment is now emerging in a far more supportive way toward Iran than before this war. Why? Because Iran has demonstrated the capacity to win—by defense and

counterattack. The Arab monarchies, Israel, and the United States have demonstrated the capacity to lose. And the effect of their losing is global. In consequence, as we all understand.

#Nima

Yeah. John, just looking at the situation in Ukraine, we know the whole agenda—the whole objective—of the Russian army, the Russian president, the Russian government was to remove the United States from the neighborhood. They didn't want the United States there. They're basically talking about NATO, but NATO is the United States putting its weapons in Ukraine. And when it comes to the Middle East, it's the same. Iran doesn't want the United States in the neighborhood. And we've learned from the Chinese that Xi Jinping has invited the opposition leader of Taiwan to go to China to talk with them. It seems they're on the same path—to talk with the opposition, to bring them to China's position. And here's what Lavrov said about what's going on overall, in terms of how the world is changing.

#Speaker 03

We are in the middle of a reshaping of the world order that will, hopefully, lead to the formation of a stable and fair multipolar world. But right now, this restructuring looks more like disruption in all spheres, and the fight for power across the world is fierce—political scientists in Russia and around the world say so.

#Speaker 03

Point to a whole range of developments that show just how challenging the history behind today's situation really is.

#Nima

Yeah. What do you make of what Lavrov is talking about, and how deep is this change, in your opinion?

#John

I don't want to disappoint our audience who want to believe that this war is a demonstration of a multipolar coalition of forces defeating the hegemonic empire. Unfortunately, that's not what's happened. Why? Because India took Israel's and the United States' side in this war, and because the Arab monarchies quietly took Israel's and the United States' side as well. They've been defeated. India, the chair of BRICS this year—Lavrov will be visiting India in another month, in the middle of May, after the May 9 celebrations in Moscow—has lost its capacity to represent its long tradition of non-alignment. It is no longer neutral. It's a fundamental mistake, a fundamental change introduced by Prime Minister Modi and Foreign Minister Jaishankar.

And they've been blocking, since the war began on February 28th, any collective condemnation of the Israeli-American attack from BRICS as a group. So India has undermined BRICS as a collective. The Shanghai Cooperation Organization, the SCO, which is much more strongly dominated by China and Russia, has issued a collective condemnation. Iran is a member of both. But Iran—its performance in this war, taking terrible punishment, yes—but the result is a demonstration that a relatively weak state can defend itself effectively against such a powerful coalition. That has seriously undermined one way of developing the multipolar world that Lavrov is talking about, the one Russia and China want to endorse. So, out of this conflict, you have Russia and China as the—let's call them—the superpower pillars of opposition to the empire.

What we see is a disappointing performance on the part of BRICS—no doubt about it. And for those who want to dramatize things for podcast purposes, let's say that BRICS has sunk under the sea this time around. So let's call it the Global South. The African states are now aligning increasingly with Russia and China, not with India, and are looking to the technology of weak states defending themselves against superpowers. That's the Iranian lesson being taught here. It's a completely different lesson—same military technology, drone warfare for example, as used on the Ukrainian battlefield—but a new lesson for the Global South. And it's a lesson coming from Russia and Iran, financed by China. That's a rather different way of expressing the diplomatic or political science theory that Lavrov spoke of. But it's different, and very important things have changed dramatically.

#Nima

Yeah, John, because you mentioned how Donald Trump—right at the beginning of this podcast, you said Donald Trump, as Walter Jones reported—wants a way out of the conflict. But on the other hand, we've learned that the Arab states in the Persian Gulf are forcing him to stay the course, to continue the war. It seems that Caroline Levitt was asked again whether they would charge these Arab states to pay for the war against Iran.

And she said, yeah, Donald Trump is positive—he's going to do that. You know, it's not just about paying for what Trump is trying to do; it's about producing the means. As we talked about before, the numbers are important right now. How capable is the military-industrial complex of continuing this war? It doesn't matter how much money you have, and it doesn't seem that these Arab states appreciate or understand the reality of what's going on. That's why it's a huge miscalculation on their part.

#John

Well, they have hugely miscalculated, exactly as you say. And it's the future of Iranian–Saudi, Iranian–Emirati, Iranian–Qatari diplomacy to, first of all, secure Arab reparations for the damage that was done. They're the ones most capable of paying for it, with the biggest long-term interest in repairing the damage in Iran in order to have a stable peace with Iran, and for the Arab monarchies to have more internal security—less threat of Shiite rebellion, which obviously drives Saudi

nervousness, Emirati nervousness, Qatari nervousness, and so forth. So the money aspect is part of the long-term Iranian reparations demand, which is one of Moshe Bachman's five points.

There's no reparations issue in Trump's fifteen points, but it is one of the five Iranian ones. Then there's the lifting of sanctions against Iran, which would revive the Iranian economy and bring Iran back as an oil supplier. Those two changes—reparations and sanctions relief for Iran—would, if implemented, mean a dramatic shift in the alignments of the Arab monarchies. There's no doubt about that. If we're heading for a situation in which Trump will agree to the JCPOA—the Joint Comprehensive Plan of Action with Iran—that he previously rejected as a bad Obama plan, minus the snapback sanctions provisions and the other elements Iran was too weak at the time to negotiate, then what are the Arab politics of that situation?

Well, it's got to be a new level of entente—cooperation, money transfers between the Arab side of the Persian Gulf and the Iranian side of the Persian Gulf—in return for more internal security, the kind the Arab monarchies are nervous about. In that situation, is there any reason for the Arab states to welcome back a reinforcement or repair of the U.S. bases that the Iranian side has attacked? No. The Iranian position is: no room—and that's where you began your question, right? There's no room for the U.S. to have bases in Saudi Arabia, the Emirates, Qatar, or Bahrain. How they would exit from this war is something still to be worked out. Let's put it this way: they've evacuated, they've suffered damage.

If they don't return those evacuees to those bases, if they don't repair the facilities that were damaged—in short, if the U.S. withdraws its bases to the only Middle Eastern territories that would welcome them, that would be Jordan and Israel—then the situation in the Persian Gulf would be very different. That would bring us much closer to what the Lavrov plan for mutual security in the Persian Gulf proposed several years ago. I think—tell me, from an Iranian point of view—do you think Iran, after this war, would be more capable of reaching security arrangements with the Arab monarchies without the U.S. bases? Would that be the case, in your opinion?

#Nima

I think it's still difficult to move forward because of the positions of the UAE and Iran—well, and Saudi Arabia. These two players are just so unpredictable. There's no logical line of thinking, in my opinion, in these two countries. When it comes to Qatar, Oman, and maybe even Bahrain or Kuwait, I'd say something in Kuwait could happen, might happen. But overall, I see the situation worsening in West Asia between Iran and these Arab states. Maybe in the long run, when things calm down and the reality becomes clearer, it could change. But right now, there's so much uncertainty. I really don't know what's going on in their minds, because so far, if you try to be logical—look at the numbers—it just doesn't add up.

They haven't benefited from this war, nor from what's happened so far with Iran hitting all these American bases in their countries. They've been paying for these bases for such a long time—not

just for the bases, but for the American forces, for everything, for everything, John. When you add up all the payments they've made over the years and look at the result, what it's done to their countries—it's just amazing to me. What else do they need to realize that this attitude isn't going to help them? It's really hard to understand their kind of, you know, calculation—their policy when it comes to the region's security as a whole.

Because after all, just remember what Saudi Arabia was trying to do. He was saying to us—all of us—“We want something like Europe. We want to be prosperous in this region. We don't want war.” So who's doing this? Who started this war? It wasn't Iran. Iran was negotiating. If he just followed what he was talking about before, the outcome would be clear: the United States and Israel are making this region unstable, creating new problems, devastation in the region, in the infrastructure, in the oil facilities. Nothing is improving as long as they keep making this kind of miscalculation. I understand it.

#John

And you don't see, as an outcome of—let's call it—a medium-term peace, not an immediate ceasefire, that's off the table, that's not going to happen—a medium-term peace. In that kind of situation, do you see Saudi Arabia and the Emirates paying reparations to Iran? And if they stop doing that, do you see the prospect of improved reciprocal security along the lines of the Lavrov plan?

#Nima

I don't see these two countries being willing to pay anything to Iran—nothing, in my opinion. But Iran would force them through the Strait of Hormuz. I think that would be the plan, to force them somehow to pay. Yeah, this is the plan. I don't see it happening, because the United States isn't going to pay anything. These Arab states—they're not going to pay. And that's the plan right now with the Strait of Hormuz. That's why they're saying the Strait of Hormuz will remain under Iranian control. It doesn't matter whether it's a long war, a short war, or something in between—the Strait of Hormuz will remain under Iranian control.

#John

Right. Yes. So that, by extension, an Iranian toll system for the Strait of Hormuz would have special exemptions for poor countries—for friendly countries that are poor. The toll system would be extended, you think, backward, so that you might get a kind of reparation system—you'll pay to prosper in the future.

#Nima

They may add a fee, because they already have a list of what would be charged in the Strait of Hormuz. They may add a line about the war—the reparations that Iran needs to fix everything. They may add a new line to charge the countries that were involved in this war. Yes, yes.

#John

That's my understanding of it. And presumably, one of the conditions would be not rebuilding or replenishing the base in Bahrain, the bases in Saudi Arabia, or the bases in the Emirates, right?

#Nima

Yeah, yeah, I think so—yeah, yeah, yeah, and yeah. Let's see what happens. We're living in interesting times, tragic times. And unfortunately, what we're witnessing, John, today—just yesterday—they targeted another school in Iran and killed twenty kids along with the teacher. This is so ugly. It's tragic, what's happening right now. But let's see what happens. Next week, I'd assume we'll see some new changes on the battlefield, because Donald Trump is just at the end of his capacity to continue this war, while Iran wants to keep it going, in my opinion.

#John

I agree. I think we have to be patient. We have to, let's say, caution against those who want to see quick victory parades or exaggerated collapses. There's no "quick." No, there's neither quick nor an actual victory parade. There's patience—and let's see, by next week, how our patience is rewarded or confounded by surprise. Yeah.

#Nima

Thank you, John.

#John

Thank you. Great pleasure, as always. See you next week—see you.