

John Helmer: Iran Just Did the Unthinkable – US & Israel Respond

#Nima

Hi, everybody. Today is Tuesday, April 7th, 2026, and our dear friend, our brother, John Helmer, is here with us. Welcome back, John.

#John

Thank you for having me back, Nima.

#Nima

John, let me start with what's happened with the American, the U.S. operation in Iran. They were talking about two other provinces in Iran—Khuzestan and Qalqilya. Then we saw the operation take place in the southern part of another province, Isfahan, in its southern area. We've seen the destruction of airplanes, along with fighter jets, Black Hawks, Little Birds, and various other pieces of military equipment destroyed at the scene. But the operation, the way Donald Trump described it yesterday, was "successful." What's your take? What do you make of what's happened in Iran?

#John

Well, several points from the Moscow end, if you like—which is a little further away, but still very important. I think it's important for our audience not to get mesmerized by the military jargon, by the lists of names or code names of U.S. airplanes—let alone the code names that were used, like Dude 44 Alpha and Dude 44 Beta, the ones General Kane mentioned in the press conference yesterday. What's happened in Isfahan should be understood politically in the United States as a very, very serious problem for President Trump. And if you see what's happening as evidence of his political problem, go back to his press conference and look at what he said he was doing on Saturday night and Sunday.

What you get is a very interesting insight, I think, into Trump's fear—what was happening politically for him. It may have been the first time in his presidency, either in the first term or now, that he thought this was going to be a winning operation. And bear in mind, the calendar shows he wasn't having any official meetings on Saturday or Sunday. He stayed in Washington; he didn't go to Miami. I've done an analysis on **Dances With Bears**, so people can look at where he was when he was tweeting and where there's no record of his location. I think we can now say he was in the Situation Room, watching very carefully.

He reveals he was watching much of the, quote, "action" on Saturday night and on Sunday. What he must have understood were the catastrophic losses of the two C-130 transport planes and the destruction of at least two—maybe three, maybe more—helicopters, not to mention the loss of another aircraft, the A-10, I believe it was, which was acting in support. So imagine yourself, for our audience—imagine you're in the Situation Room, and you think you are the commander-in-chief of the greatest military machine ever in the history of the world. That's his language. And suddenly you see the possibility of what has been a two-pronged operation.

That's the significance of Major Amanda Ryder's papers—that she left behind not only her ID and her Israeli visa (we'll come back to that in a minute), but also a packet of operational documents. You can see it in the video: their maps, their orders, their codes. There it is. Those are top-secret operational details—names, destinations, orders—the entire story of what that operation was about. Somehow or other, Major Ryder left it behind. Now, in the latest **Dances With Bears**, for those who want to—ah—she's got a platinum American Express card. That's interesting. I hadn't spotted that before.

Not your regular American Express card, but a platinum card. Okay. As a major, you earn about \$110,000 a year. What we need to see here is what the evidence she left behind reveals about the nature of the operation. Then we go back into the Situation Room and put ourselves at the table where Trump is understanding two things. One, there's an operation to attack the nuclear facilities in and around Isfahan—capture nuclear material, kill everybody around, and then destroy the interiors of whatever storage facilities or bunkers they come across. That operation, if it was designed—and it's in those papers, in that package you just saw—that has totally failed. Second, they're trying to rescue the second crew member, who Trump spends a lot of time describing as having dragged his wounded leg up, scaling down cliff faces into a cave on a mountainside, and so on and so on.

He's reporting what he was seeing on TV—he thought he was in a great adventure show. He talks about it like that. The problem is that suddenly, with the Ryder evidence, we're looking at the possibility that's dawned on everybody in the room, especially Trump: they're looking at a Jimmy Carter-sized catastrophic failure of a hostage rescue mission. Two planes—big transports—and several helicopters destroyed. That's even more than Carter lost in May of 1980. Now, Trump remembers—and everybody in U.S. politics remembers—that Carter and Brzezinski thought they'd be giving themselves a tremendous political advantage in that election year, from May to November, if they were able to pull off a military rescue operation of the U.S. Embassy hostages.

Instead, they blew it in a very big way. The mission—you can look it up on Wikipedia, folks—I won't bore everybody by retelling it. But the political risk to Trump was huge. He couldn't cope with the possibility of another one of those, especially not when you look at the polls. You look at the polls right now for Trump and you see a steady increase in disapproval—it's going up like that—more

disapproval, and approval going down, but slowly, with about 16% to 20% undecided. If there had been a disaster of that kind, it would have been disastrous for him. You'd suddenly see all the undecideds joining the disapproval, and instead of it being 54%, it would be 70% or more.

#Nima

Sorry for interrupting, John. It was called Operation Eagle Claw.

#John

That's right. Great bird names—Epic Fury, Eagle Claw. They never name operations "Operation Sparrow." But there you are. That was what happened. But the politics—and that's what I'm emphasizing—go back from the military risk to the politics. Just bear in mind another thing that Trump admitted during the press conference. He was asked, "Has anybody opposed your operations against Iran?" And he admits, yes, there's military opposition. He says—Trump says in the press conference—that there were military objections, people in the military objecting to the rescue mission. What he really means is there were military objections to the attack, the mission, the operation to seize the nuclear material.

That was an operation the military thought was too risky, too potentially dangerous, too likely to lead to a Carter-like disaster. And it did. It did—except that, by Trump's luck, they recovered the second crewman. So what we have in the press conference is a demonstration that Trump inadvertently gives when he offers his thank-yous and answers press questions: a clear sign of a significant split in the White House and Trump's fear of a major catastrophe. Let me put it another way and sum it up quickly before getting back to your questions. When Trump's afraid—when he has that fear of losing—he becomes even more violent than he was before.

And that's exactly what happened coming out of Sunday. First, he celebrates the capture—two tweets—or the recovery of the crewman. Then he gets even tougher, nastier, using swear words again against Iran, talking about bombing them back into the Stone Age—plural. There you go, there's the swear word. You'll find more swear words from Trump, new ones, in the press conference if you look hard. So politically, what we have here is something I'd like to call the Jewish faction, which is in favor of escalation, and the Christian faction, which is against it. Who are they? Trump thanks Vitkov and Kushner. Why are they involved in a military operation?

Why were they in the room? Trump wants them there. He relies on them. He relies on Hegseth and Kane—the two military types—Kane, the chairman of the Joint Chiefs of Staff—to take orders. But we already know that the chief of the Army staff has been forced to resign. We know from Trump that there's military opposition to his adventurism. They don't want to lose people. They don't want a military catastrophe. Trump doesn't listen to them; he's listening to Trump—Vitkov, Kushner, and Netanyahu. They want to annihilate. They want genocide against Iran. They have wanted, if necessary, tactical nuclear weapons.

Trump thinks—and the U.S. military is against this for all sorts of good reasons—that he can pull off brilliant operations without resorting to nuclear weapons. So he's persuaded the Israelis to join him in this Isfahan operation. We find that Reuters papers show she was ordered into Israel on March 20. That's when her visa entry begins. She's to be there until June 20, 2026—three months. The planning for her trip started at least a month earlier. So we now know, in retrospect, from that small amount of evidence—and the Iranian side has much more—that Trump and Netanyahu were planning this operation before the war started on February 28.

There's quite a lot one can learn from the catastrophic outcome of those two fixed-wing aircraft and three helicopters burned up on the ground. Politically, in my opinion, what our audience has to do is put themselves in the room and understand that when you're the president of the United States, you're facing not only defeat on the ground but humiliation—a political loss on the scale of Carter's. And what that will mean for Trump is personal. If he loses control of Congress in November, he faces the likelihood of a coalition to impeach him. He knows that impeachment will lead to prosecution—for himself, his family, his sons, the whole group.

So he knows what that's like. He's just come out of that after many years, right? So the stakes are personal for Trump—on Saturday night, Sunday—personal. Therefore, he projects himself, and he says it; you can see from the words in the press conference, he's projecting his own fate in the movie he's watching of these operations. So I think what we have to do is wait, learn more, and understand that Trump's apparent loss of mouth control, loss of anger management, his increasing escalation of threats—all relate to his fear on Saturday night, Sunday, and his determination to absolutely crush the source of his fear in Iran, now, today, 8 p.m. tonight.

#Speaker 03

Yeah.

#Nima

Yeah. Here's what Lindsey Graham said about tonight at 8 p.m., John. Yeah.

#Speaker 03

Yeah.

#Nima

This is Lindsey Graham's understanding, but what we've just learned from the Iranian president—he tweeted moments ago—was that over 14 million proud Iranians have, up to this moment, declared their readiness to sacrifice their lives in defense of Iran. And he's one of them; he registered his name. For many people talking about the war in Iran, it's not just about the war—it's about

everything right now in Iran, John. It's about everything: the future, the history, what Iran is today, what Iran represents today. It's about everything. That's why I don't see anybody backing down in Iran.

#John

And Lindsey Graham's just made it clear that it's capitulation or destruction. He called capitulation a diplomatic solution, but he means capitulation. And the giveaway in the press conference—the psychological, psychopathological giveaway that Trump mentions—is that they've humiliated the Iranians with their rescue mission. This is back to front. In fact, he's afraid of being humiliated. And without too much psychoanalysis of Trump—his niece, Mary Trump, has written a whole book about that—I can hardly bear to read it. But it's there to understand that the man is psychologically very dangerous right now, and we have to be very serious about that. So the Iranian side, as you've just described, both people and government, have to understand that capitulation or destruction amounts to the same thing.

#Nima

Yeah, John, when it comes to the situation right now, we know that Donald Trump is somehow coordinating. In my opinion, he's putting himself in a trap by sending these kinds of ultimatums to the Iranians. That's not going to help him if he really wants to resolve the problem. That's what we learned from the Iranian side yesterday. They responded to Donald Trump and his administration in a letter sent through Pakistan. It's ten points, and they were talking about everything. I think that's the main objective on Iran's part. It doesn't matter if Donald Trump decides to attack Iran or continue this war—Iran is prepared, from what I've learned and from what we've seen so far. But if Donald Trump is serious, he has to seriously think about those points that Iran sent to the United States through the government of Pakistan.

#John

Well, we can go through it. The reply involved ten points. We talked last week, and then the week before, about what we might call the evolution of the Iranian position—from Ayatollah Khamenei's five points to Ambassador Jalali's statement in Moscow, which amounts to four points. And now we're back to ten points because the Americans threw fifteen points at them. Basically, I use the word "evolution," but the Iranian position has been very consistent; it hasn't changed. Still, the ten points have some interesting angles that a rational U.S. side might consider.

The most interesting thing—let's just remind everyone—is that Mojtaba Khamenei and Ambassador Jalali's statement in Russia involved reparations, removal of U.S. bases, and permanent solutions so that it wouldn't just be a ceasefire, meaning Iran wouldn't be exposed to another round of Israeli-American planning to attack again. It also included preservation of control over the Strait of Hormuz, lifting of sanctions, no limits on missile capacity, and readiness to accept nuclear enrichment at

civilian, not military, levels. Those were the main points in the past. The new ten-point reply that came from Islamabad has a couple of additional interesting issues.

At the beginning: a permanent end to the war, lifting of sanctions, and an end to regional conflict—in which Iran links the conflicts in Gaza and Lebanon to this war and this negotiation. Guarantees against future attacks—we've just covered that, you did too. Reconstruction and reparations, a Strait of Hormuz protocol, and a transit fee proposal. The wrinkles here are—I calculated this in a tweet this morning—if Iran sets up a toll system, which is the proposal, there are about 120 average vessel transits every day, half of them oil and gas, half bulk and container ships, box trade. At roughly \$50,000 a year, a \$2 million toll per vessel adds up to about \$100 billion.

Now, suppose Iran gives itself a free pass—sanctions off—and gives friendly and poorer states significant discounts for their own cargoes. Let's basically say a \$50 billion discount. Then you take off 50% because Iran's promising to share the Strait toll with Oman, and you come up with approximately a \$25 billion discount for Iran's reparations, which in the ten-point answer is committed to restoring and repairing war damage, nothing else. So there's a proposal—it's got arithmetic, it's got numbers—intelligent, reasonable people could negotiate it. When Trump was asked about this yesterday, you know what he said? "To the victor go the spoils. I'll take the tolls," he said. "Why should they have them?"

Now, the man's mentality is absolutely dominated by Kushner, Vitkov, and the other Jewish member of his circle, Stephen Miller. "Violence makes victory, makes spoils, makes ours"—that's their line. You don't see any sign of the so-called national security advisor, Marco Rubio, either in the Situation Room or at the press conference. He's gone. You only see the two military yes-men. And we have the opposition—the opposition based on polling, that's Fabrizio in the White House—legal issues, war-crimes issues, future-immunity issues, and the military-risk issues. You just don't see on the U. S. side any shaping up of diplomatic negotiations. There's nobody there. There really isn't. Vitkov and Kushner are not diplomatic negotiators. They're not going to negotiate at all. So what's left? Answer.

Iran is having its effect through its capacity to retaliate with more violence than the U.S. expects and to inflict more damage than the U.S. and its allies, including Israel, can tolerate. The U.S. can tolerate some of it. Israel can't. Kuwait can't. Bahrain can't. Saudi Arabia, and so on. So it's only by preserving and replying tit for tat—symmetrical and asymmetrical violence—that Iran can persuade the non-negotiator in Trump and his faction that the risk, which the Christian faction and the Pentagon generals are warning him about, isn't worth running. Does that answer the question? As far as I can see, there's no negotiation. There's an exchange of papers. And until Trump exhausts his fear and can be persuaded that he's won, we'll see continuing escalation. I don't see an alternative to that, no matter how reasonable the Hormuz Strait toll system might turn out to be.

#Nima

John, my understanding is that Donald Trump is trying to destroy everything before leaving—everything he's achieved—and get out of the Middle East. He's doing this because, as we speak, they're bombing Kharg Island, hitting the defensive facilities. The Israelis are bombing railways across Iran. And here's what's amazing: people should see this picture—you see the rabbi, the head of Iran's Jewish community, visiting the synagogue that was destroyed by the Israeli attack.

You know, this is significant, I think, after all, because when it comes to a ground invasion—I think the incident yesterday with the raid, if we assume that was a raid and not a rescue operation—that has totally failed. And Donald Trump knows that if he decides to go in that direction, it's going to be hugely, hugely consequential for his presidency in the United States. You know, right now, as we speak, Democrats are talking about the impeachment of Pete Haxett. These are huge repercussions from what's happening right now between Iran and the United States.

#John

Well, we can't really talk about impeachment until the Democrats win control of both houses. They can talk as much as they like—they're simply running for office at this stage, and they haven't won it yet. But it is a fear on the Republican side, especially in the polling department, the chief of staff, and so forth—those sections of the White House. But for the chief rabbi of the Iranian Jewish community to be looking at the destruction of the synagogue, it's important to understand how religious Trump is, and how his people are in their sense that God is on their side. I mean, I do recommend, if anyone can bear to read the press conference, you'll see Trump claims that while he was watching the operation to rescue the weapons officer—the highly respected colonel, as Trump calls him—he apparently used his transmitter to send a message to the CIA and then to the Situation Room: "God is good."

And then Trump goes into a whole riff about how good God is—on Trump's side. There's a sentence or two, I won't bother quoting it, where Trump sort of confuses himself with God. "God's uncomfortable with what's going on," says Trump, talking pretty familiarly because it's Easter. And then he says, "I'm pretty uncomfortable." The combination of Trump, God, and the particular Chabad version of Judaism that Kushner follows, along with many elements of the Netanyahu government in Israel—and Gruenbaum, who's also part of the Kushner-Vitkoff negotiating team—these are Chabad ideologists. These are people who think that God is theirs, that they and God are holding hands. And everybody else can, as it were, be eliminated because they're evil—a term Trump uses repeatedly.

These are religious, doctrinal terms. Now, look—not even Hitler, not even Mussolini—had to use such a sense of exceptionalism as a religious doctrine. The state of Israel is founded on such a doctrine. It's now part of the President of the United States: some combination of the Christian God, evangelical mission, Armageddon coming up, the Messiah arriving. Trump's got all this running around in his head. And it's a bit of a mistake to view him as purely the stooge of all these people—all the State of Israel, all the Zionist lobby, all the faction fighting. He's not just the stooge; he articulates for them.

He chooses between them and the alternatives that are presented to him. He actually has some sense of a God-given mission.

These are serious problems, which can only—well, I mean, we can talk about them. We can try to be reasonable about it. We can explain. We can be horrified and resist. The problem is, there's only one way of resisting this problem, and it's not rational talk. It's war. And when the talk is exhausted, only the Iranian capacity to survive, retaliate, survive again, and inflict a level of damage that forces negotiation remains. It seems to me we've reached that terrible point—and it is a terrible point. There's nothing, no fun and games, about it. This isn't a video game. For Trump, it's a kind of religious video game. That's what he went through on Saturday and Sunday. He thinks he was resurrected.

#Speaker 03

Exactly.

#Nima

John, when it comes to this rate of remorse and the payment system, I think it's very problematic for Donald Trump and for people like Lindsey Graham. Here's what Lindsey Graham said about the payment system and this rate of remorse.

#Speaker 03

Right now they're charging ships—the IRGC, the Iranians—to go through the straits, and they're taking the yuan, not the dollar. One threat in this whole debacle is that if we start allowing the Chinese currency to be traded in oil, it will hurt the dollar. In 1974, every barrel of oil sold and traded in the world was traded in dollars. Now, what are the Iranians trying to do? They're trying to change the currency from the dollar to the Chinese yuan, and that's an attack on the dollar. And that needs to end, too. So I'm very optimistic that President Trump's going to bring this regime to an end one way or another. I prefer diplomacy. But this time tomorrow night, they're either going to do a deal that makes sense for the world, the region, and for Iran itself.

#Nima

John, what is happening? I think the use of the petroyuan, or as they call it, an alternative currency, is one of the most important parts of this new movement to get away from the dollar—getting away because the dollar is not going to help Iran. They've been under tremendous U.S. sanctions for more than 46 years. That's why Iran doesn't want to get back into that cycle of using more U.S. dollars, because it's not going to help them in the long run. I think the tone is—well, let's assume—it's not just about Iran. The whole Global South, I'm talking about Russia, China, Iran, and even India, which recently bought a new tanker of oil, 600,000 barrels, from Iran in rupees, in Indian currency.

This is the reality of what's going on right now. I don't know what's going on in the minds of these people, that they think they can somehow force other countries to use the dollar. That's not there anymore. That's not the logic for them anymore.

#John

I can only agree with you. I'm not as optimistic as some are that this is a war that will end the U.S. empire. On the contrary, what I see happening in the United States today is the potential for Trump to blow up, in a sense, by overcommitting to wars he will lose—particularly in the Middle East. Then Vance could come in as a potential alternative and strengthen the U.S. empire in the Americas. The U.S. empire would run from Greenland through Canada, down through Mexico, and simply dominate all of Central and South America.

It will be an American empire anchored in the Americas, led not by Trump but by Vance. The sequencing of wars we've talked about before—part of the more rational members of the Pentagon staff's doctrine—would mean moving away from this level of violence in the Middle East, moving away from the level of violence on the Ukrainian battlefield, and concentrating on containing China and rebuilding a kind of North and South American empire, which would be dominated by the dollar. The U.S. would actually strengthen and control all of the Americas. That's not the end of the U.S. empire; it's not even the end of the dollar.

But with the attempts by Russia and India to use rupees and rubles, and with the efforts of BRICS to find bilateral and multilateral payment mechanisms outside the dollar system—to avoid the way the U.S. can use sanctions to track dollar-based transactions—all of that's in flux. I'm not confident that, as a result of this particular war, from tonight on, from 8 p.m. on, we're going to see the U.S. empire collapse. It's significantly weakened in that region, no doubt. If they escalate—and our colleagues here, Ted Postel and many others, have pointed out that with Iran retaining the capacity to retaliate—any escalation against Iran threatens the survival of the state of Israel.

Any nuclear attack—and I'm glad Ted Postel spelled it out—has very grim numbers. In a nuclear attack that Israel launched against Iran, Iran would survive, but the retaliation would end Israel. This isn't me saying it; it's someone who's looked at this from a nuclear engineering, warfare engineering point of view for a very long time. And that's clearly what's at stake. There are U.S. policymakers in the Trump administration who understand that risk. They don't want to go over that precipice. Trump himself simply doesn't understand the precipice. He's got God for his parachute. He's got a sense of... he's got an eleven-year-old's English vocabulary.

He's got serious psychopathological problems, and he thinks that out of the disaster of the weekend, he wins a victory. So this is an individual who actually dominates—dominates, not is simply manipulated. And he's going to overstep his capacities. And Vance is waiting there to take advantage. Now, exactly how that will play out, I don't know. It remains to be seen. There's simply nobody left in the U.S. press capable of analyzing the signs anymore. Trump doesn't allow anybody

in press conferences to get near him to ask unpleasant questions. The New York Times, the Washington Post, the Wall Street Journal—they've all discredited themselves. We're the alternative now. I'm not proud of it.

#Nima

I think, John, the outcome of this war—it was unthinkable before it happened. What does it mean? It means that, you know, what's happened in the war in Ukraine—you see destruction. I would say after Ukraine came the destruction of Germany. You know, look at the German economy, look at what happened with the North Sea pipeline, and the presence of American forces in Germany. What was the outcome? Right now, Germany is suffering from the problems with Nord Stream and from the repercussions of what's going on in the Middle East. There's some comparison between Germany and what's happening in the Middle East. These Arab states are somehow in the same position as Germany was, and has been, during the conflict in Ukraine. They're losing a lot. For such a long time, they were paying the United States for all these beautiful, big bases in their countries.

And right now they're getting devastated by that policy. They were, you know, they were paying for everything related to these bases—everything. And, you know, somehow you can compare these countries to Germany. But do you think, as we talk—you mentioned before, coming up to this live—you mentioned Bahrain has a request at the UN, which would be voted on today at 11 a.m. Eastern time. How do you see these Arab states, the GCC countries? Because they're losing everything, and they're coming to the—well, I would say they're coming to a solution. You know, in Germany, the head of the AfD was talking about how the United States should leave Germany, that they have to withdraw their troops. These are huge, unthinkable consequences of what has happened in Ukraine, together with what's going on right now with the war in the Middle East. What's your understanding of that?

#John

Well, let's get to the general part, because that's really important. Remind me if I wander off. Let's just go quickly to what's about to happen. It's about 8 o'clock Eastern Standard Time right now, and in three hours, on the same clock, the UN Security Council will meet again to vote on a heavily amended Bahraini resolution. As you said, it's supported by all the Gulf Cooperation Council members, but the dominant one, as always, is Saudi Arabia. So this is essentially a Saudi-American resolution, put forward through Bahrain because it's the nominal chair of the UN Security Council at the moment. What's happened is that this resolution was intended to legalize war in the Gulf against Iran—to provide a mandate for all defensive measures deemed necessary.

The language keeps changing, but it clearly meant a mandate to use force if the Arab states—principally Saudi Arabia, the Emirates, Qatar, and Kuwait—were to combine with the United States to force the Strait of Hormuz open. Now, China, Russia, and France have all indicated, in the negotiations in the corridors and back rooms of the UN, that they will not vote for it. They may even

veto any language that creates a legal mandate for force. That's what they've said. Macron has gone somewhat further than the other Europeans you mentioned—certainly further than Germany, and much further than the UK and Italy. Italy is negotiating now with Iran.

So France, then Macron—who's himself almost as volatile and unpredictable as Trump—became the target of personal insults from Trump, aimed at both Macron and his wife. I'm not here to defend Macron, but the fact is that in the narrow, pressure-cooker politics of the UN Security Council, three veto-wielding powers have said no to a force resolution. Now, what we don't know—because the exact terms of the resolution aren't public until they're voted on—is exactly what the language is. What we do know, because Mr. Arachi, the Iranian foreign minister, and Foreign Minister Lavrov had a telephone call yesterday, and I've just reached for their communiqué, is that they discussed this subject.

I'll just say, paragraph three makes it very clear that, in agreement with the Iranian side, the ministers—Arachi and Lavrov—called for the avoidance of actions, I'm quoting, "including those in the UN Security Council, which could undermine the continued chances of promoting political and diplomatic efforts to resolve the crisis." Well, that's one or two cheers for the Russian position. It's not clear from Representative Nebenzia or the deputy representative whether they're getting ready to veto. Remember that when they faced an Arab consensus in the UN Security Council in the past, they've abstained.

This time, though, it's clear what this is. It's like the UN resolution that authorized force against Libya. Back then, President Medvedev didn't veto that resolution, and the outcome was the assassination of Gaddafi, the destruction of the Libyan state, and all the troubles of the Libyan civil war spilling out across Europe, right? So Russia's very clear—it's opposed to any attempt to legalize American force. You asked, what do the GCC, what do the Arab sheikhdoms think they're doing? Good question. It's not for me to get back into Arab politics, which I left many years ago. You're in a better position to say.

But the sheikhs have long lived on wishful thinking. They've long been dominated by the idea that they could use their growing wealth to buy U.S. protection—saying off camera how much they dislike the Americans, and on camera how reliable the American protectorate is. They're duplicitous, yeah? However, the bottom line has been that they've relied on an American protectorate—Patriot missile systems, THAAD missile systems, and radars—that have ceased to be a deterrent, have been penetrated and destroyed by Iran. So, for the first time, the sheikhs are looking not at an enemy that cannot penetrate U.S. defenses, but at one that has.

Now, how can they think they can mobilize the remnants of U.S. force to force open the Strait of Hormuz? It seems unlikely they have any confidence in that. And it's clear that Egypt, Turkey, and many Muslim states don't support the sheikhs. So this is the last stand of the sheikhdoms—the Arab monarchies. I'm reluctant to use the word "monarchy" because it has a very long history, which these sheikhs and their families do not have. They don't have even the pseudo-legitimacy of

European monarchies, you might say. What they've had is reliance first on British protection against the Ottomans, then on U.S. protection—and now, who's protecting them? That's a problem they've yet to face.

And I... This resolution, which will come up in a couple of hours' time, will, I think, have no practical effect. The battlefield is being determined by the balance of forces, and the sheikhs are on the defensive. They are defeated in their defenses. The alliance between Saudi Arabia and Pakistan is dead as a doorknob. The alliance that was written in January between the UAE and India—dead as a doorknob. The Houthi threat to close Bab el-Mandeb, the gateway to the Red Sea, is the last potential resource Iran has not yet mobilized against the Saudis' effort to use Yanbu port and the diversion from the west to the east to get half their oil—or about, let's say, a third of their oil—out in lieu of what they can't get out through Hormuz. There are lots of fantasies about how they can build alternatives to Hormuz.

Force isn't an alternative now. So whether Russia and China agree to veto, or whether they're satisfied that the resolution is so watered down they can vote for it or abstain, we'll know in a couple of hours. But the practical outcome—Russia's committed, with Arachi, to say this doesn't help. And the Russian commitment to help Iran put force and deterrence behind their diplomacy is proving to be modestly effective. So, well, I don't know. It's a long-winded way of saying I don't know why the Saudis think this helps. Nobody else thinks so. And Trump himself has said, "To the victor go the spoils. I'll take the toll of the Hormuz." Trump has said, "We don't need the Hormuz oil." Actually, he's not quite right about that—they take Saudi and Iraqi oil.

But he said it's up to the Europeans to negotiate. Well, the Europeans are not Lindsey Graham's idea. The Europeans are ready to make bilateral agreements and, essentially, in principle, will agree to some form of Hormuz Strait toll system, which would give more than a nod to Iranian sovereignty. In any case, the Iranians are not going to negotiate this ace in their hand without significant elimination of sanctions. After all, why should Iran open the Hormuz to others—all of the others, including its enemies—when the Hormuz Strait has been effectively closed to Iran itself by all the sanctions against it? This is a paradox. The only way to solve this paradox is by winning this war, acting with sufficient force to deter any further attacks. And the resolution, I think, will go nowhere.

#Nima

No. John, you mentioned earlier the situation with France. What's happening with the gas there, for example? And how is that affecting Emmanuel Macron's decisions?

#John

Well, I have a particular personal connection to rural France, and I can tell you right now—and that's what we were saying before we came on air—there's considerable fear about the closing of petrol stations. Fuel is now not only expensive, about double the price, but it's often unavailable. You have

to go to a website to find out where there's any left. If you're in the French countryside and you depend on your car to get around, to get to the doctor, or you need your truck to run your business, you can't get diesel. You can't get normal petrol products because the stations are closed; they have no supply. Also, cooking gas—in remote areas, container gas is essential for all sorts of purposes—that's short as well.

But Macron isn't introducing an equitable rationing system. He's letting a distorted market draw supplies all over the country in a way that maximizes the vulnerability of the rural population already severely hurt by everything Macron has done. I'm not sure Macron gives a fig for rural France. And I'm not sure the political dynamics will put pressure on him. What's putting pressure on Macron are the French oligarchies, or business oligarchies, around him—and the French military, who understand they might be drawn into a Ukraine battlefield situation, which they don't want. But just by the way, let's remember that the French general staff have been mighty helpful to Israel in Lebanon.

Let's not forget that the French behavior opposed to Hezbollah, in support of Israel, is largely secret and undocumented. But one can find plenty of evidence for it in the resistance journalism that exists in France. So you have tremendous stress that everybody's feeling. You mentioned Germany—it's getting equally dire in England, wherever you go in Europe. And this is a direct result of the sanctions. Therefore, governments like Meloni's in Italy are trying to negotiate bilateral special agreements. They'll pay the toll as they look forward to some withdrawal of U.S. forces. And once U.S. forces are withdrawn, the sheikhdoms have a new problem: how to negotiate with Iran.

#Nima

Thank you so much, John.

#John

Great pleasure, as always. Thank you, Nima. We've got, as I said, two deadlines to look at—the 11 o'clock one in New York and the 8 p.m. one when Trump's "bridge day" ultimatum comes. Well, as you pointed out, they're already bombing the infrastructure—the railways, the power plants, and so forth. So the ultimatum is already being violated by them. They're not holding back. The only thing we'll have to see is what happens after 8 p.m. And we'll also learn in the coming days what happened with the Isfahan operation and what became of Major Amanda Ryder, and all the things she helped us understand about the U.S. military failure at that spot over the weekend. So thanks for having me.

#Nima

My understanding is that Donald Trump is going to declare a tactical attack.

#John

He thinks he'll back down.

#Nima

Because he has no other solution. He has no other option than that, because they're already attacking everything in Iran. That doesn't change anything when it comes to the reality for the Iranians. They know they want to fight—they want to fight back—and they're prepared for that. That's why I think Donald Trump goes with the tactical option today. Let's see. Let's see. Thank you. Bye-bye. Bye.