

Pepe Escobar: OFF-RAMP: Iran-Israel War Enters New Phase

This interview examines the expanding Iran-Israel conflict, arguing that the war is entering a dangerous phase with no clear off-ramp. The speakers discuss Iran's focus on strategic military targets, the risk of wider regional escalation, shifting power dynamics in West Asia, the Strait of Hormuz, and possible long-term consequences for NATO, Europe, and the global economy. They also explore how the conflict could reshape alliances, resistance movements, and the future balance of power in a rapidly changing world.

#Nima

The war, Pepe, so far—look at the targets the Iranians had. It was basically radars, gatherings of American soldiers, weapons, ammunition—everything they had in the region. Those were the main targets of Iranian attacks, not only in the Arab states but also in Israel. Right now, I think one of the reasons—if you look at the curve in the initial days of this war—you see the number of drones and missiles fired by Iran was very high. Then, as they destroyed everything in those bases, the number started to level off. I think the sustainability of the war was on Iran's mind—how to sustain it, how to continue as time goes by. But if the United States escalates—because Donald Trump is talking about four weeks—in the minds of the Iranians, it's not four weeks.

It's going to be a long, long game—a long war. Even Israeli media is saying that. Yesterday, more than 700, maybe 760 drones were launched at Israel, and mostly sensitive locations were hit by these drones. The Israelis estimate that the Iranians are producing a huge number of accurate and cheap attack drones, and that Iran is preparing for a long battle. This is the calculation on the part of the Israelis. I think that's the reality. From what I understand of the Iranian military and their strategy, this is the way they see it—they want to continue this war. They won't go up and down. If some escalation happens, as Donald Trump was talking about yesterday, they're going to respond the same way, even twofold—two or three times the way their own infrastructure is being attacked.

But we have to understand that all around Iran—from Iraqi Kurdistan going south—we have these American bases, these, you know, collaborators with the United States. So Iran has to take care of all these issues around the country. That's why I think even with the attacks on desalination plants, schools, and water resources, Iran keeps its focus on strategic targets. But as these targets are totally depleted, totally out of work—they're not functioning anymore for the United States—that could hugely influence the economy in the long run, as you mentioned, because it affects oil facilities, gas facilities, and desalination. These are huge escalations, as Donald Trump was talking about just yesterday.

#Pepe

Well, the most rational strategy for Iran now would be to raze Israel to the ground—much more than the Gulf petromonarchies. And the Gulf petromonarchies—the important sites in Bahrain and Kuwait—were already hit. They can hit them again. Saudi Arabia depends on how the Saudis are going to act from now on, of course. And the key target is the Emirates, because once again, the Emirates are de facto at war with Iran. So Iran should go after the infrastructure of the Emirates. And that's it. It's not very complicated to erase it, you know, because they already know what's coming from the Epstein–Syndicate combo, which is indiscriminate bombing nonstop.

So they have to respond in kind. And these are the two key targets: Israel and the UAE. This is probably going to be the logic from now on, over the next few weeks. And obviously, off-ramps are out of the question. You saw the attempted assassination of Kamal Kharazi—his wife was killed, and he's probably seriously injured. He was one of the last negotiators still alive. After Kharazi, there will be no negotiators left; it'll be IRGC hardliners. That's it. And they'll go all the way. So the possibilities of an off-ramp have diminished substantially this week, in the past 48 hours. That's it.

We are into the logic of—well, we are inside the inferno escalation machine, as I called it in one of my articles last week. We're right in the middle of a no-holds-barred escalation machine with no off-ramp. It's terrifying, really. At least from the big-picture point of view, we already have some of the results of this war, whatever happens next. Number one: the Empire of Chaos is never going to get its military bases in West Asia back. Never. They're gone forever. And that was one of Iran's demands. Number two: the new regime in the Strait of Hormuz. That's it—it's not going back to what it was before. It will be negotiated with Oman.

So the Iranians have already set up how it's going to work in Iranian territorial waters. And Oman can do the same thing if tankers go through Omani territorial waters. Same thing—but it's both of them. It's a different system, completely different. Half of it is already in effect. That's it. You need to pay the toll, you need to communicate your essential information, you need approval from the IRGC Navy. Then it's okay. There are different strata. You can have government-to-government deals. For instance, it already applies to Sri Lanka. Sri Lanka, Thailand, the Philippines, India—it already applies. It may apply to Iraq, and it may apply to others later. With China, no problem.

It's part of the strategic partnership. So, let's see—the West, especially the West that applies sanctions to Iran. These are completely red cards to all of them. So we'll depend on perhaps individual Western nations trying to strike deals with Iran. That's another story. But the new system is already there. It's been approved by the Iranian parliament, and that's it. It's going to become law, and there's nothing anybody can do about it. So these results are not provisional; these are long-term results of the war already in front of us. And the third one, which is more immaterial, almost metaphysical, is that the aura of invincibility of the empire—it's over, also forever. Forever.

And this has been seen by the Arab street, by the lands of Islam, by the Global South, by everybody who has eyes and a functioning brain. That's it. They will never recover from that. So, couple all of the above with the Petro-Yuan in effect at the most important choke point on the planet. That's it. You have, I would say, 70% to 80% of the most important consequences of the war already happening. So, what do they plan to achieve, Nima? Bomb Iran to rubble? Is this going to change any of the above? No. Absolutely nothing. The horror story will be, of course, for Iran as a nation and for 90 million Iranians. But they may rebuild. They have it in them to rebuild. And the example of a sovereign, resistant, civilizational state going head-to-head with the empire practically alone—and making the empire scream—wow.

This is the big lesson of the 21st century, which none of us expected would happen so fast. It's happening right now, right in front of us. This is how multipolarity begins—under fire. There's no other way. That's it. So obviously, Nima, we can't expect those barbarians to understand conceptually what we're talking about. They feel that everything they imagined—not planned, because they didn't plan anything—went horribly wrong. Now they want it to end, but they don't know how. And they know that if it ends, it ends with their defeat, their strategic defeat, which hurts even more. So there's no way out for them. This, in many ways, explains their blind rage.

So, you know, their blind rage is diverted to bombing civilian infrastructure. Is this going to change anything? No, it won't. And it will only harden Iranian resolve even more. Now, I have a question for you, Nima. It's a very sensitive one. Of course, it's speculative, considering it comes from different points across the Shiite world, across the Arab world, across Islam as well, and from some informed people in the West. Can we say that the IRGC is now in full control of the Iranian state, and that Ayatollah Mostafa Khamenei is more of a symbolic, referential, very important figure, but not the one making the final decisions? I'm asking for your personal analysis. You can give it as an Iranian—it doesn't have to be a geopolitical analysis.

#Nima

No, no. I think what's going on in the era of, you know, the new leader—the new supreme leader—is that the...

#Nima

He's going to have, in my opinion, pretty much the same sort of relationship with the IRGC. It means that he, after all, is going to call the shots. He's not IRGC, but he has a very robust and close relationship with them. In a way, we can say both are the same. I think the correct way to put it is that there's no gap between the two. That's why they're so united in their goals, their aims, their objectives. So there's no way to find something in between, some sort of gap. So, what would be

the strategy as time goes by with this war in the Middle East? In my opinion, the Supreme Leader of Iran, together with the IRGC, don't see these Arab states—the people living in these Arab states—as their enemy.

They see them as their brothers and sisters. This is the reality—people need to understand that. What's happening with the leadership in these countries is something totally different, and they recognize the difference between the people and the leadership. That's why I think, in the long run, the policy will be about getting closer to the people in the region—making the resistance, the whole movement. You look at the acts of resistance: they're not based on a few people running the show or being close to each other—the leader of the resistance in Iraq and the leader of the resistance in Yemen, for example.

It's about the people. You know, the whole Shia faith is bringing all of them together. I think that after what has happened in Gaza and the West Bank, it's bringing not only Shia Muslims but Sunni Muslims together. You know, that's a new sort of tone, a new sort of attitude—a new kind of movement happening from within the Muslim community. And many people in the West don't understand it; they don't appreciate what's going on. That's why Benjamin Netanyahu is talking about wanting to make some sort of alliance against the acts of resistance.

#Nima

God, this guy doesn't know what he's talking about.

#Nima

You know, if MBS or MBZ—Mohammed bin Zayed—decides to make some sort of alliance with Benjamin Netanyahu, it's going to be him, you know, MBZ together with his people, maybe 20 people, 80 people—that's all. It's not about the population in those countries. We have to understand that. We have to understand what's going on. You mentioned the case of Bahrain, the case of Kuwait. These are huge, you know, sort of changes happening in the region. And Iran understands that. That's why I don't see it, not only between the IRGC and the Supreme Leader of Iran, but even among those people, mostly the reformists.

You know, you see the way that, you know, Pazeshkian—just compare Pazeshkian today with how he was when he was elected. You can read his tweets from today or yesterday and the ones he posted when he got elected in Iran. The tone has changed. There's no difference now between the people trying to draw a line between the IRGC, the reformists, and the leaders—I think they're all coming together. Because this is Iran fighting the empire. It's not the IRGC fighting the empire; it's Iran—the whole country, the population. Iran as a nation is fighting the empire and its vassal, its proxy in the Middle East, which is Israel. That's the reality, I think.

#Pepe

Did you— I haven't seen this anywhere. Was there any direct communication between Ayatollah Sistani or Ayatollah Sistani's office and Ayatollah Mustafa so far? Because I haven't found this anywhere.

#Nima

They have close connections—very close connections. Actually, he was congratulating Mustafa Khamenei on his new position as Supreme Leader.

#Pepe

Sure, but I'm talking about the closer contacts, not just this formal acknowledgment.

#Nima

I see. People are talking, I imagine—they're talking all the time, 24/7, talking to each other. It's not just between Ayatollah Sistani and the Supreme Leader of Iran; the whole axis of resistance is communicating with each other.

#Pepe

That's for sure.

#Nima

That's a huge communication line that's happening. Yeah, yeah. Before, Pepe, when the war started, nobody was even thinking about the resistance in Iraq. They did everything. We were talking about the Yemenis and Salah, we were talking about Hezbollah, and you know how they were underestimating those two groups—the Yemenis and Hezbollah. They're totally different from how they were portrayed before in the mainstream media. And right now they know the reality of these two forces. The importance of Iraq, Pepe, is something else, because Iraq shares a border—a common border—with Iran.

And they are close to these Iraqi Kurdistan, these Kurdish terrorist groups. They're basically the front line against those Kurdish terrorists if they decide to do something. That's why I think Iran has totally dominated the region so far. Everything is under Iran's control. And that's why many people are so comfortable with the war they're in. They know what they're doing. They know what the long run is—what it would be in the long run. But Donald Trump is trying to disrupt everything by attacking civilians, by attacking and bringing pain to the people. That's what he's trying to do.

#Pepe

Yeah. Mm-hmm. Mm-hmm.

#Nima

And the other point, Pepe—my question to you is how Russia sees the whole situation right now. We had... That's tricky.

#Pepe

That's very, very tricky. Very tricky. Well, we were supposed to go there this month, but they canceled everything in Moscow. We were told there's total concentration on the war. So, you know, meetings or conferences—they canceled everything in April. But the debate now in Moscow is very sophisticated, very tricky, because a lot of people are making direct comparisons between the Kremlin's attitude toward the SMO and the Iranians' attitude toward the American war against them. And some of these comparisons are not very flattering to the Russians. We can imagine how. But still, these discussions are very, very tricky.

Because depending on how you frame it, you can instantly be branded as unpatriotic or even a traitor. So you can compare the methodology of the SMO, of the Kremlin, of the Russian Ministry of Defense, and the fact that they—why they haven't, I would say, gone for the kill, for the jugular of NATO so far. And we understand the long-term motivation. And of course, in the case of Iran, they needed to go for the jugular, like they started to do from the beginning, because for them it's an existential war. It's a war inside the Iranian nation. The war in Ukraine is different—it's inside the new regions of Russia, but it comes from outside.

It comes from another nation supported by NATO. That's a completely different story. But I'm very curious, next time I'm in Moscow, to dig deeper into it. Because there are some rumblings that maybe the situation is about to change—that perhaps Russia, this year, finally goes for the coup de grâce, you know. And the pieces of the puzzle are being moved in a way that suggests Russia has a very strong probability this year to go for the kill, if they choose to. Iran, on the other hand, doesn't have a choice. Iran has only one option: defend themselves and inflict maximum punishment on the Americans and Israelis. It's different. So... but in terms of support, for instance, what Lavrov said a few days ago was fascinating.

He confirmed that Russia is supporting Iran, but he didn't get into details because those are matters for the Minister of Defense and the big guy up there. It's a state secret, but everybody knows it's substantial—especially in terms of intelligence, and particularly precise satellite coordinates for the Iranians, so they know exactly what they're going to strike and can do it with maximum precision. That's the merit of Russian intel, no question about it. So this isn't going to change. And, of course, there are, once again, rumors—but okay, first we have to see where those rumors are coming from.

There was an unmistakable message from the Kremlin that if Israel tries a tactical nuke, or even a nuke, against Iran, there will be consequences. And I'm sure the Americans got the message. Obviously, those psycho killers in Tel Aviv don't get messages from anybody. But I'm sure the Americans got it and told the Israelis, "Go slow, because if it happens, it's not us—you're on your own." The situation, as we all see, is moving literally all the time. It's totally fluid; it can go anywhere. All the horrible options remain on the table. And, of course, because of that, all the possible rational off-ramps are not on the table—or they stay there for a day or two and then disappear again.

#Nima

I think, Pepe, the outcome of this war for Iran would be that they're going to withdraw from the NPT. Iran is not going to be part of the NPT.

#Pepe

They have to. They have to. They have to. There's no reason for them to stay in the NPT anymore. Yeah.

#Nima

And in terms of the nuclear program, Iran is not going to negotiate with the United States. Iran doesn't care anymore about sanctions or anything else. Because right now, with the Strait of Hormuz, their plan is shifting from the petrodollar to the yuan. They know how important that is.

#Pepe

It's already the petroyuan. And they found a source of income, so they don't even need to worry about sanctions. So what? Now we have our own income. We collect it in our own territory. This beats any sanctions. In fact, with one move—it's fascinating, Nima—they beat sanctions, SWIFT, and the petrodollar all at once. This is beyond clever. Obviously, they achieved that before; it was one of the first things they gained years ago, certainly. But that's what it took, and this is the move that destabilized the empire completely. Once again, because these idiots never—I'm not talking about the military-industrial complex as a whole.

I'm talking about the idiots around Trump—the three or four people he actually listens to. Obviously, they never planned it. They never thought this would be feasible. Once again, they thought they'd have a weekend war, that they'd win, and by Monday it would be "mission accomplished" and the markets would go up. And now it's too late. You can see the rats scurrying as the Titanic flounders,

right, Nima? He's trying to throw anybody in front of him under the bus—"Ah, it's not my responsibility." Now it's NATO's responsibility as well. So it's the planet's responsibility, except his. And he's the guy who gave the final order. Typical, man. Cowards. All cowards react the same way.

#Nima

I think NATO is done, Pepe, with what's happening in this war against Iran. Because Europeans are—somehow—even Austria came out today and said, "You cannot use our airspace or our bases to attack Iran." And this is the new reality that Donald Trump finds so difficult to digest, because for such a long time he was putting pressure on them—"from 2% to 5%." Now people in Europe are asking themselves, what's happening? If they can't defend Saudi Arabia, the UAE, or Bahrain, how could they possibly defend Europe? Or is it even possible anymore for the United States to help Europe? They've had those forces in Germany for such a long time—it's not something new.

In the aftermath of World War II, they're still there in Germany. You know, the head of the AfD is talking about how the United States should leave Germany. This is the reality. The new reality isn't just about leadership—the people are feeling that way too. What's the importance of the United States in Europe anymore? If Iran can push the United States out of the Middle East, then for Russia it's going to be easy to push the U.S. out if they attack. Europe needs to come to some kind of understanding of what's going on. I think with the Strait of Hormuz, they're starting to realize it. They want to make a deal with Iran—without the United States. Do you see that happening in Europe, that kind of understanding of the reality?

#Pepe

Let's say it took something like this—sooner or later, you're going to have zero energy—to wake them up a little bit. We don't know what's going to happen next. Another very important and, in effect, consequence of the war is the progressive dismantling of NATO. It's already happening. Many of us were saying, "OK, NATO and the EU are going to collapse. It's going to take a while—it'll be a parallel process." But it's happening much, much faster than any of us could have imagined. NATO is already collapsing now, in real time, right in front of us. And it's not because of Ukraine, not because of the proxy war in Ukraine. It's because of the empire—the war of choice of the empire against Iran—because that's where it touches Iran.

Of course, Ukraine has an energy component—no question. But this is much, much more serious. The Strait of Hormuz is the ultimate bottleneck. If you touch the Strait of Hormuz, the whole global economy is affected. And Europeans now see that they don't have energy—no extra energy from anywhere. No Russia, no Qatar, nothing. They have to do something. So maybe this is the beginning of... I wouldn't bet on it, Nima, considering the astonishing mediocrity of the whole European political class, with two or three exceptions. But obviously, they're already starting to think, "Okay, we need to do something. Okay, at least." But the process of the parallel collapse of the EU and NATO got a big boost with the war as well.

That's another positive consequence. How they're going to fare without the US—that's another story. It's their problem. They never thought this day would come. It's knocking on their doors now, and they have to come up with solutions. And of course, they'll never change their mindset from one day to the next. I was reading what the usual Polish or Baltic chihuahuas, or Finland, were saying: now we need to reconstitute our defenses against Russia. It's always against Russia, right? Okay— with their spectacular armies that couldn't conquer a hot dog stand— and they want to reconstitute their armies to fight Russia. Good luck.

#Nima

Amazing. Yeah, I think Donald Trump was asking Poland to send their Patriots.

#Pepe

He said, "No, we have one or two." Okay.

#Nima

After South Korea, now Poland—are you going to send everything to help Israel?

#Pepe

It's unbelievable.

#Nima

It is. People need to understand that the United States is prepared to sacrifice everything— everything—for Israel.

#Pepe

Of course. But now it's in the open. It's not unbelievable—it's believable, because now everyone has proof, in front of the whole planet, that the only thing that matters to them is that death cult over there. Everybody else is a vassal you can use, you can profit from. But, you know, when the going gets tough, that's it—you have to save the death cult.