

# Pepe Escobar: Ceasefire or Calm Before the Storm?

A fragile ceasefire between Iran and the U.S. is unfolding amid deep mistrust, conflicting demands, and ongoing regional violence. Mediation efforts, particularly through Pakistan, have exposed miscommunication and political manipulation on multiple sides. While negotiations begin, both camps appear to be using the pause to regroup militarily. Iran is seen as holding strategic leverage, especially around the Strait of Hormuz, while global powers like China and Russia play complex behind-the-scenes roles. Despite talks, a lasting agreement seems unlikely, with tensions, competing interests, and the risk of escalation still dominating the landscape.

## #Nima

The ceasefire — a two-week ceasefire — and the negotiations are going to happen. I want to know, what is your understanding of what has happened so far?

## #Pepe

Well, it's extremely complicated because the situation started unraveling the minute after the ceasefire was announced. In fact, it was blown up within the first ten hours, and practically everyone across the spectrum was convinced it was dead. But then, from yesterday to today, it somehow resuscitated. Very, very important — once again, the role of a go-between. In my latest column, I talked in some detail about the role of Pakistan, not as mediators or architects of the ceasefire, but as messengers, the go-betweens. They were passing messages back and forth, and this apparently led to enormous misunderstandings. The number one issue is the version in English that the Americans got of the Iranian ten-point plan.

Apparently, the original version in Farsi is quite different from the version in English that the Americans received. But assuming the people in the White House can read — that's not a guarantee. We know that the "baboon of barbaria" doesn't read anything, but he has minions who read for him. They could have gone to X — it was published there for days — the Iranian ten-point plan, in English. Very, very simple. And this was exactly the first version translated into English and available on X for everyone to read. So the accusation that Pakistan may have interfered and passed along a wrong or badly translated version to the U.S. doesn't hold. We know the White House lies all the time. And on top of that, they started lying immediately after the ceasefire — apparently, they started lying about Lebanon.

Prime Minister Sharif posted once again on X, in English, saying that Lebanon is included. Everybody can check that on X. But the Americans immediately afterward started saying, "No, Lebanon is not

included.” And the stupid blonde spokesperson for the White House said, “No, it’s not included.” On top of that, she said, “Ah, no, and the ten-point plan is absolutely ridiculous, etc. We threw it into the garbage.” So this was the White House already destroying something they had theoretically agreed upon before. Typical White House, right? Once again, Pakistan acted as a mediator. Between yesterday and today, the Pakistanis once again promised Tehran, “Look, the Americans told us they are going to restrain the genocidal war criminal in Tel Aviv.”

After, of course, he had gone on an absolutely demented rampage all across Lebanon, killing people everywhere — not only in Beirut, but all over the place. Something absolutely horrible, Gaza-style. And Iran was ready to respond immediately. Really, a highway to hell. So we were, thanks to the Pakistanis once again, saying, “Okay, we trust you — at least probably for the last time. We’re going to send our delegation to Islamabad.” They’ll probably be arriving tonight in Islamabad. I know where they’re staying — I stayed there, Nima. You know, the Serena Hotel in Islamabad. It’s a wonderful hotel, which, by the way, was completely evacuated. They expelled everybody. Now it’s a fortress because both delegations are going to be there. But Vance is going to be at the American embassy in Islamabad, with the war setup around the embassy. Typical. Well, that’s the substance of all that.

On the Iranian side, we’re going to have Araghchi and Qalibaf — that’s predictable. They’ve been leading these negotiations, the back-and-forth, including the subterranean ones. And on the American side, we’re going to have J.D. Vance — J. Palantir Vance. I was discussing this with you, Nima, before we went on air. He’s clearly thinking about his legacy and building his future as a presidential candidate, of course. He’d love to pose as the statesman who brought peace — whatever we can call it — between the U.S. and Iran. But we also have Dumb and Dumber at the table: Witkoff and Kushner. It’s absolutely impossible, off the top of our heads, to come up with a metaphor to explain the Taoist patience of the Iranians, who once again have to sit at the table with these two idiots who bring nothing whatsoever — no expertise, no diplomatic skills, no reasoning, nothing.

But it’s the official White House–designated delegation. So the real negotiation will be between Vance and Araghchi-Qalibaf, no question about that. What can they possibly achieve if we compare the Iranian ten points and the American fifteen points? Both sides are totally aware, point by point, of the other’s position. And as we all know — and our audience knows — everything is absolutely incompatible. So how do you bridge that gap? Okay, it could last a weekend, maybe go on a few days, but within a matter of days it would be practically impossible. Is Iran negotiating from a position of strength? I’d like to ask you, Nima, after I finish here — how do you see it? I’d say that for the moment, the landscape is quite muddy and fuzzy.

They didn’t need a ceasefire. Now Iran has the initiative on every front — especially on the most important one, the Strait of Hormuz, the real game changer. So they don’t need a ceasefire. They were starting to ramp up, I’d say, the next stage of the decentralized mosaic strategy, using their latest missiles, considering that Israel has practically run out of interceptors. They can bomb Israel

any way they want from now on. So why does the empire of chaos and the absent syndicate need a ceasefire? To redeploy. It's an operational pause. We have to see this from the operational point of view — the military operational point of view — much more than the geopolitical one.

What they can do in two weeks — not much, but something is already ongoing. They can pre-position all the assets they have, including 50,000 troops, to try once again a mini ground invasion somewhere in the Persian Gulf — Qeshm Island, whatever that is, or Kharg, which is still far away. But there's this American obsession that if they take Kharg, they cut off Iranian oil exports. So the whole situation, for the moment, ceasefire-wise, favors this American redeployment and pause. The Iranians are, as you know, Nima, perfectly aware of that. And when they say they have their finger on the trigger — yes, they know this thing can restart anytime. And they are ready. And of course, they are also redeploying their forces and reorganizing the decentralized mosaic.

But then there's something I couldn't confirm, and it's a very, very worrying development if it's true. It's absolutely impossible to confirm this with the Chinese, and obviously military sources in Iran won't volunteer this information. Apparently, there were three cargoes from China that landed in Tehran between yesterday and today — three huge cargo planes, probably bringing hardcore military material to Iran. There's a possibility that Iran was running out of essential munitions, and the Chinese are helping. We don't know; there's no way to confirm that. But this would explain why China, at the last minute, influenced Iran to take the ceasefire — because until literally the last minute, Iran was inclined not to take it.

Okay, what are we going to get out of it? After all that absolutely crazy back-and-forth in the Muslim world — WhatsApp messages, phone calls, discussions lasting hours, maybe more than a day — the Chinese, at the last minute, told Iran, "Okay, take it." There are lots of actors, intercontinental in fact, who will appreciate the fact that you're negotiating. So, in terms of increasing your political capital, it's a good thing. "We have your back" — that's the Chinese talking to Iran, the way we interpret it. But we don't necessarily know how deep China's support for Iran really goes. And considering that these decisions, Nima, in Beijing, are very opaque — you never know how they make them.

And especially for us foreigners, it's off-limits. It's impossible for us to know. So, considering our contacts or, you know, the analysts we talk to, we can have an idea. But there are many elements that favor China telling Iran, "Sit down and talk," while the Chinese are also coordinating with Iran militarily. At the same time, when it comes to the Strait of Hormuz — until one or two days ago — the Strait was closed again and open only for a few ships a day. The Chinese ships had no problem. And, very important for China, this toll booth is being operated in yuan, with payment through CIPS, the Chinese international payment system. This is the beginning of the petro-yuan, you know, taking shape.

So, from a Chinese point of view, this is steady, and it's not going to change. For instance, what will change is if major countries officially accept that the Strait of Hormuz is now managed by Iran —

that they submit to its rules. Then there's going to be a stampede of nations all over the world following suit. And guess who's on the front line? South Korea. They sent a special emissary to Iran, probably to discuss the passage of tankers going to South Korea. And of course, they'll abide by the new rules. So if South Korea officially accepts those rules, that's it — everybody else will follow. Iran is playing with that as well.

Because they know that a closed Strait of Hormuz, or even a nearly closed one, means Asia is bleeding — literally. So the number two victims are not the U.S.; they're Europe and Asia. And obviously, Asian nations are mobilizing — especially South Korea, much more than Japan. Japan is an extremely complicated case; it's an American vassal. South Korea has more leeway. So this is where we are at the moment. The way this whole thing is interconnected is extremely complex, and Iran has to juggle all these variables. At the same time, because Iran now has a different stature globally, it's starting to be seen as — I wouldn't say a big power, but an emerging big power on the global stage. They have to manage this new political capital.

So it's a very uncomfortable situation to sit down with these genocidalists at the same table for a ceasefire that mostly benefits the U.S. We're going to see — let's say — we're going to see the tenor and tone of the first day of negotiations, where this is going, or if it collapses immediately. Every scenario is possible. But I think, for most of us, the most important element in the big picture is how complex the chessboard is that Iran has to navigate — and they cannot make a single mistake. That's how difficult it is, right? Okay, Nima, now I'm asking you practically the same question. How do you see the pros and cons of Iran sitting at the same table in Islamabad, convinced by the Pakistanis that there's going to be some sort of meaningful dialogue with the Americans? And, of course, there won't be interference by the death cult.

## **#Nima**

I think those three cargoes you mentioned are basically related to the defensive part of Iran's military operation — its defensive capabilities. Because in terms of offense, they don't have any shortage. But it seems that, through some kind of behind-the-scenes negotiation, the Chinese government convinced Iran that they could make improvements in a short period of time. If the talks failed, they could still enhance their capabilities — in electronic warfare, for example, or in improving Iran's air defense system. I think that was the whole agenda: let's try to negotiate with the United States.

Let's give it two weeks of, you know, some sort of ceasefire and see what happens. On the other hand, Iran had these communications with the government in Iran — it's not something new, Pepe. What's been agreed on so far is a 10-point plan. If I'm not mistaken, four days ago Iran presented those 10 points. It was reiterated — it wasn't just four days ago; they've been talking about these 10 points long before that. But what's happening now is a drastic change on the part of the Trump administration as well, after that failed raid on Iranian soil in the southern part of Isfahan.

Because that gave them some sort of understanding of what a ground invasion of Iran would look like — what the reaction from Iran would be, and what the capabilities of the Iranian army are on the ground. I think there are many factors to consider. The way China was somehow promising Iran to improve its defensive capabilities, the way Iran saw that this short period of time might influence or even improve the whole conflict — the capabilities of Iran to sustain a war for such a long time. On the other hand, you see Donald Trump somehow failing in the latest attack on Iran. It was a raid; they wanted to do something on the ground.

It was a huge failure. We're going to learn more in the near future — I hope so — about the casualties from that operation, because we haven't heard anything about them. It's all about one pilot being rescued from Iran. That's a total lie; nobody would believe that. This is the calculation on the part of the Iranians. We know that the first point in this 10-point plan was that the war would end on all fronts. They're not going to talk about just Iran and the United States. That's why this Lebanese factor is coming into the equation right now — because without Lebanon, there's no ceasefire at all. Absolutely.

## **#Pepe**

Okay, I have another question for you. Do you see a split at the highest level of the government in Tehran, especially inside the Supreme National Council? Correct me if I'm wrong — there are 13 members in the Supreme National Council, right? Ghalibaf is one of them. That's very, very important. But there are some pro-possession people who are — we can say — the reformist, almost fifth-columnist camp. And they got a boost after Zarif published that ghastly opinion piece in *\*Foreign Affairs\**, which was basically a surrender manifesto. I read it again — I read it a few days ago, and then I think yesterday I read it again — and it still sounds like a surrender manifesto. And obviously the Americans loved it because it gave them an opening to start manipulating some figures close to the presidency. Do you see a split, or is this just superficial?

## **#Nima**

No, nothing like that is happening in the leadership. When we talk about Zarif — Zarif is not part of the leadership. He's on the margins of the reformist side of the Iranian political community in Syria. That's why what Javad Zarif was trying to do, I'd argue, isn't that important when it comes to domestic policy. In the West, they look at Javad Zarif as though he's the decision-maker, but that's not the case. That's not the case. He can explain how he sees the conflict, how he sees an end to the conflict, an end to this war — but that doesn't necessarily influence the decision-makers in Iran. You mentioned Pezeshkian and his team. They're not getting closer; they're very attached, very close to Ghalibaf, the head of the parliament. Very much so.

I would argue they're following the same kind of policy right now. That's why I think this attack has unified all the political parties in Iran. I'm talking about the people who are influential, who matter in the decision-making centers of Iran — they're totally unified. There's no gap, no difference between

them. You can talk about domestic policy — sure, they have their differences there. But right now, that's not the issue. Right now it's about foreign policy, about how to stand up to the United States. That's why they're completely unified, ready to go along with any plan that comes up. It's going to be a unified plan, not something separate from Ghalibaf and his team or different from Pezeshkian's side. No — they're all the same right now, in my opinion.

## **#Pepe**

So would you say the decision to accept the ceasefire and go to Islamabad was consensual at the Supreme National Council, or do you think there was a lot of friction before they reached a definitive conclusion? And listening to the street, right, Nima? Because the Iranian street is, I'd say, practically completely against any accommodation with the Americans.

## **#Nima**

Exactly. But what's happening, Pepe, is that there are a lot of discussions going on in Iran. Just imagine the communication between Iran and China, Iran and Russia, Iran and, domestically, even some coordination with Turkey and, I would argue, with Pakistan. There's a lot happening behind the scenes that we don't know about. We don't know exactly what's going on. But I can confirm that any decision related to this two-week ceasefire was made at the highest level of the Iranian government. I'm talking about the leadership — about everything. Everybody's involved. We're talking about Mostafa — exactly. They know what they're doing. Without the confirmation of the Supreme Leader of Iran, they're not capable of doing anything, and people should understand that.

Because when we talk about this, many people in the West just don't have a comprehensive understanding of the Iranian government. They don't know how it works. The Trump administration has no clue about what's going on in Iran. That's why they're miscalculating. They rely mostly on Israel and Mossad — and those aren't there to inform them; they're there to deceive them, to push them, to buy them into a new war. That's why they're failing, in my opinion — with the negotiations, with the war, with everything related to Iran. But after all, the leadership of Iran — the whole leadership and the Supreme Leader, together with the people below him — they're all, you know, when they go after such a decision of ceasefire and negotiation with the United States, they consider all of that. And it could be a unified decision on their part.

## **#Pepe**

Do you think this has been well explained to Iranian public opinion, especially over the past two days? Why are we going to Islamabad? From what you see on Iranian Twitter, where it's exploding against the decision — and in the Iranian media, for instance, Shariatmadari, Kayhan, that newspaper — I interviewed him, Nima, twenty-something years ago. As you know, he's an old fox. He's essentially against it, for instance. And Kayhan is a very influential newspaper in Iran.

## **#Nima**

And we have to understand, Pepe, that always, always the role of the leadership — the Supreme Leader of Iran — has been to stay right in the middle of these movements to the left and to the right, and to make the right decisions. That's why, you know, when you see Shariatmadari, as you mentioned, the head of the Kayhan news outlet — he's so important, by the way.

## **#Pepe**

He is, yes.

## **#Nima**

When it comes to the right, he's as influential as Zarif is to the left. You know, they're both influential in Iran when it comes to the left and the right. But what's important is the decision on the part of the leadership. The leadership lets all these sides talk the way they're thinking, the way they're feeling about the conflict. But the leadership has its own decisions, together with all the officials involved in the government and above the government. I think this is the reality of what's happening in Iran. Pepe, do you have any other questions?

## **#Pepe**

Maybe later, because I was struck by some things that—was it the Iranian ambassador in Pakistan, maybe?—who said that the Iranian delegation is going to Islamabad, even considering public opinion that's not exactly supportive. Well, he admitted it. And they have to, because if you follow the discussions in Iran, even from abroad, it's obvious that the vast majority of public opinion is against any accommodation. So this obviously had to be considered by the Supreme Security Council, and of course by the leader himself. So it's a very sophisticated, calculated bet that they can navigate the Americans at the same table. It's going to be very hard to extract any concessions. So maybe the best they're aiming for is to stop the bombing—and that's not guaranteed, exactly.