

Pepe Escobar: Iran's Retaliation CHOKES Hormuz, DECIMATES Saudi Oil

Pepe Escobar discusses the breaking developments emerging from the wreckage of the Iran war, including Iran's bombshell strikes on Saudi Arabia causing a massive fallout for global oil, Trump fuming over Iranian moves on the Strait of Hormuz, and the ongoing desperation of Israel to keep a losing war going. Pepe Escobar is a geopolitical analyst and independent journalist. Follow him at Telegram: <https://t.me/rocknrollgeopolitics> and X: <https://x.com/RealPepeEscobar> LIKE the video and Subscribe for more in-depth geopolitical analysis! Leave your thoughts in the comments below! Support the Channel: Patreon: <https://www.patreon.com/dannyhaiphong> SUBSCRIBE ON RUMBLE: Rumble: <https://rumble.com/c/DannyHaiphong> Follow Me on Social Media: Twitter: <https://twitter.com/DannyHaiphong> Telegram: <https://t.me/DannyHaiphong> Support the channel in other ways: <https://www.buymeacoffee.com/dannyhaiphong> Substack: chroniclesofhaiphong.substack.com Cashapp: \$Dhaiphong Venmo: @dannyH2020 Paypal: <https://paypal.me/spiritho>

#Danny

Welcome back, everyone. It's your host, Danny Haiphong. As you can see, I'm joined by geopolitical analyst and independent journalist Pepe Escobar. Pepe, good to see you again.

#Pepe Escobar

Good to see you, Danny. Greetings from midnight in Buddhist Southeast Asia. Greetings to you and to our audience.

#Danny

Yeah, really appreciate you taking the time this early morning for you. Everyone, hit the like button—that helps boost the show. Pepe, let's get started with this debacle. Okay, we have a debacle now. Everyone—even the Western mainstream—everyone's saying the U.S. has suffered, at the very minimum, a strategic defeat. The very minimum. That's what we're talking about here. And we have a number of developments I just want to outline so people get a sense of what's going on. So, Donald Trump is still very much obsessed with the Strait of Hormuz. He's saying that Iran is doing a very poor job of allowing oil to go through it.

And that's not the agreement they had. Here's what Dropsite News had to say about what Iran is actually doing: it's asserting major control, and there are at least 2,000 ships still stranded. Iran has basically told every single tanker—except the ones it's giving permission to through its toll system—that they have to stay put. Now, this also comes, Pepe—I don't know if you saw the news—I found

this very big. There are reports that Saudi Arabia is accusing Iran, just hours after the ceasefire, of hitting their major oil pipeline, the East–West pipeline. That’s the alternative to the Strait of Hormuz.

Not only that, but there are other production facilities they claim were hit at this time—hours after the ceasefire—amounting to 1.3 million barrels per day slashed from Saudi oil production. Iran is saying they didn’t do that. But we do know that Iran did hit Saudi Arabia in the days before the ceasefire was struck. We also have news that Iran is holding out on talking to the United States at all until a ceasefire in Lebanon is reached and until frozen funds are released by the United States and Iran. So, Pepe, help us outline what’s going on here. It still feels like the U.S. is trying to force Iran to capitulate before talks even happen, and Iran has essentially said no.

#Pepe Escobar

Exactly. First of all, it was the Trump administration that was begging for a ceasefire—and not just in the past few days. They started begging for a ceasefire after three or four days of Operation Epic Fuck-Up. Well, before our conversation, just a few minutes ago, I was trying to find out where the Iranian delegation is. Nobody knows for sure. The Pakistanis are basically saying that an Iranian military plane arrived at a military airport in Rawalpindi. Rawalpindi and Islamabad are sister cities. Just to give you an idea, if you go by taxi from one to the other, it’s about 20 or 25 minutes. So they’re actually there. Theoretically, they’re at the Serena.

We could call the Serena Hotel in Islamabad and ask them, “Look, are they there or not?” Okay, nobody has done that so far. And then, when you look, the whole spectrum of Iranian official and semi-official media says they have not left Iran. Theoretically, they’re at Imam Khomeini Airport, and they’ve been there for hours. Now it’s around nine o’clock—8:30 or so at night—waiting. Waiting for these two points that Ghalibaf stressed in some of his recent posts. The first one is Lebanon—exactly, that’s the one—the ceasefire in Lebanon and the release of Iran’s blocked assets. These blocked assets are very, very important because it’s not an enormous amount of money, but it is substantial.

Seven billion dollars held in Qatar, but this was collected by South Korea and it’s related to U.S. sanctions. So now we have South Korean embassy staff with the banking people in Qatar scrambling in the middle of the night to unblock these seven billion dollars before tomorrow morning. I wonder if they’ll be able to do that, especially because Saturday morning is a bank holiday or something. So this is where we are. We don’t know if they’re in Pakistan. We’re not sure if they’re at the airport in Tehran. And these two items—they won’t be unblocked in the next few hours. So for this negotiation—and, of course, the Pakistanis—they staged a Hollywood-style spectacle at the Jinnah Center.

It’s a really nice, enormous setup in Islamabad—decorations, beautiful chairs, you name it, a space for the media and all that. But nobody knows if this thing is actually going to happen. So this is where we are at the moment—a major cliffhanger. Apparently, Vance is on the way. Vance should

arrive in the next few hours. Right. And the whole setup is already there. Like, wow—it's larger than life. You know, the usual scene when there's an American presidential visit anywhere in the world. So, Danny, this is all part of the information war, because we have an information war on both sides, and both sides are trying to pose as if they're in the driver's seat.

We all know who's in the driver's seat by now, in terms of inflicting a strategic defeat on the empire. We all know what's going on. But, of course, when you pay attention to what Vance said before he left the U.S.—the tone wasn't as much of a "barbaria-style" threat, but it was still threatening. And this is something I reconfirmed yesterday. Correct me if I'm wrong, Danny, and everyone in the audience, but right at the beginning, when Vance became vice president, he may have mentioned that we should bomb Iran. I don't know if that's true or not. So this requires a little bit of—well, I didn't have time to check this before. And obviously, he changed his mind along the way. Apparently. But, of course, that's also not confirmed.

He was against Operation Epic Fuck Up until the last minute. But that's if we trust the New York Times—and of course, we don't trust the New York Times. So it's all up in the air. What is clear is that there's a big power play tied to his presidential ambitions. He obviously wants to get credit as a peacemaker. His chances, I'd say, on a scale of 0 to 10, are probably about 0.5. But that's how he sees it, of course. This has everything to do with his own career path. So all these variables come into play, right? The Pakistani variable is immensely complicated but fascinating. For instance, I shared on my Telegram a brilliant article by one of my best friends in Islamabad, Junaid Ahmad.

Junaid is a professor of Islamic studies, but he's also a very, very good geopolitical analyst. Basically, he says that even if this is, to be very diplomatic, an unelected military junta in disguise—that's what it is—because the big guy in this government in Pakistan now is Field Marshal Asim Munir. He's not the prime minister, Shehbaz Sharif—definitely not. But they were very clever in positioning themselves, not exactly as mediators, but as go-betweens. The Americans basically chose Pakistan to be their main go-between to talk to Iran, because they knew Iran wouldn't talk to them directly.

And indirectly, they wouldn't trust Egypt. They wouldn't trust Saudi Arabia. They wouldn't trust Turkey. But Pakistan is a different story. So, obviously, the Trump administration has been using Pakistan. And the Pakistanis—very, very clever—they, you know, wow, they leveraged that to the max. And now their new geopolitical standing in the world has shot up like that, you know. And when you compare it to India, the Indians are basically crying at the moment. Nobody is even paying attention to India. But the problem is, once again, the lost-in-translation elements in this back-and-forth of passing messages.

We still don't know for sure if the Pakistanis sent the Americans the real Farsi translation into English of the 10-pointer, or if the Americans got it and are obviously lying. There are two possibilities. The Iranians got the 15-pointer—the translation from English to Farsi in the 15-pointer—they read it and

already knew it, right? But the 10-pointer, that's where there's this enormous discussion about what's really in it. But it's so easy—go to X. The 10-pointer was on X for days in English. Everybody knew what it was. So the White House can't just come out and say, "No, that wasn't in the 10-pointer."

#Danny

No, that's it. It's there.

#Pepe Escobar

So this is just, I'd say, two or three percent of the maze we're all in.

#Danny

Yeah.

#Pepe Escobar

And of course, without knowing, this thing is going to happen in Islamabad tomorrow.

#Danny

Yeah, and the same goes, too, Pepe, for what's going on in the Strait of Hormuz. How long has it been since Iran announced and started working with vessels there around this toll? You know, Fox News—here, I'll just play this—they're very surprised. They just found out this was going on, along with the president, and they're getting insiders telling them that the Strait of Hormuz is under effective IRGC control.

#Fox News

Did you know that?

#Danny

You'll see right now.

#Fox News

Incredible. Iran is indeed demanding fees from the few vessels it's allowing to pass through the Strait of Hormuz. This official adds that the Strait is effectively under full IRGC control. They decide who gets to go through—and, more importantly, who doesn't.

#Danny

So that's been going on for quite some time. But Donald Trump came out and said, "I heard that they're charging tolls." And as I mentioned before, that's not part of the agreement. So all these developments, though, Pepe, seem to point to the United States. Now, Donald Trump— I don't know if you saw— it's the same kind of game. It's the United States under Trump trying to look very big. We'll see in 24 hours what's going to happen. Maybe they're privy to the fact that the Iranians are just hanging out at the airport. We have a reset going; we're loading up ships with the best ammunition, even at a high level, to do a complete decimation. This doesn't bode well for talks. It seems like there's a level of ignorance—or maybe they're playing ignorant—and also making threats.

#Pepe Escobar

Both, Danny. Ignorance, feigned ignorance, or outright ignorance—which is even worse. And what's obvious is that nobody in that circle of sycophants, ass-lickers, and so on is passing real information to Trump. It's mind-boggling. And because he doesn't read anything, he obviously can't fact-check anything. This is extremely, extremely worrying. It proves once again that he has no clue about the overall big picture on the local chessboard—in the Persian Gulf and in the Strait of Hormuz. People in the middle of the Sahara Desert already know by now that there's a toll booth in the Strait of Hormuz. Many of us have explained how it works: you need authorization from the IRGC Navy, you have to pay the toll booths, and you can pay in yuan, in crypto, in petro-yuan—you name it.

Then you get the signal, then you cross and all that. And they are fine-tuning this. Every day there's a different set of regulations. In the past 24 to 48 hours, very, very few tankers have crossed through. There was a Russian tanker yesterday—this was immensely interesting. The Russian tanker was coming from east to west in the Strait of Hormuz, and it went all the way to Kharg, which is in the northwest, to load itself with oil and then send it somewhere else. It could be part of the Russian shadow fleet. It could be a totally illegal Russian tanker, but it's probably going to India on the way back. China doesn't need that from Russian tankers; they have their own, let's say, "China shadow fleet," which isn't really a shadow fleet. China has at least 26, 27, or 28 tankers that keep going back and forth with no problem.

And, of course, the fine-tuning of the toll booth is already a process. It started with what we're seeing now—very, very important—because Iran established a new navigational route for the tankers. Before that, they usually crossed the Strait of Hormuz in the middle of the strait, let's say equidistant from the Iranian shore and the Omani shore. Now they have to navigate very close to Iranian territorial waters, between Qeshm Island—the big one—and Larak, the smaller one. So these tankers are navigating not in international waters but in Iranian territorial waters, and that provides the legal framework for them to install a toll booth. Absolutely. This was brilliant. And why can't they go through the middle of the strait? Because it's mined. It's mined, so nobody can cross it.

#Danny

Wait, wait, wait. The Navy, though—Pete Hegseth and Donald Trump told me it was eliminated.

#Pepe Escobar

It was obliterated, and now there are sea mines.

#Danny

That's strange. How are there sea mines? You know, it's just... it's absolutely mind-blowing. Well, Pepe, I wanted to get into how we got to this point because, as you know, the Gulf countries—Saudi Arabia complaining about the damage to its oil facilities, the UAE and Bahrain pushing, pushing, pushing, saying that the Strait of Hormuz needs to be out of Iran's control—and we also have the report you referenced earlier, where Donald Trump, for weeks, the Trump administration was actually leaning on Pakistan to convince the Iranians to agree to a pause in fighting that would reopen the Strait of Hormuz.

Its crucial role was to act as an intermediary and sell this to Iran. And then you wrote, Pepe, about the conditions that led us here in your latest article, **"Barbarians Strategically Surrender, Civilization Wins."** How did this surrender come about? Because a lot of people are very concerned that what the United States is doing looks similar to the Ukraine situation—seeking a pause, getting a pause, and then rearming. Iran doesn't seem so concerned. Maybe you could talk about what you outlined here, given these conditions.

#Pepe Escobar

Yes, this "strategic surrender" is temporary. Obviously, if you put that in a headline, it sounds like it goes on forever, right? But if you read the article, it's clear. For the moment, they were desperate because of operational issues—running out of weapons. The Americans and their allies in West Asia needed an operational pause. This doesn't mean that in two weeks they'll be able to rearm completely. These weapons aren't available anywhere, for that matter. And of course, they'll never have what it takes for a ground invasion of Iran—whether that's Karg Island, the Strait of Hormuz, Qeshm, the southeast, Balochistan—no. But they could try, they could try, of course, to establish a beachhead somewhere.

Let's say, for instance, on Qeshm Island. How this thing would survive, nobody knows. And every serious military analyst says, no, this is absolutely suicidal. But considering that we have the push-up clown Secretary of Forever Wars over there, never underestimate his stupidity. For the moment, he's leading the Pentagon—until the moment he's thrown under the bus by Trump. Everybody knows that, probably sooner rather than later. So the problem is, everybody also knew that the Americans were trying to find a messenger, and they settled on Pakistan at least two weeks ago. At least. Because this back-and-forth started with a few messages, and it picked up speed when they had that first meeting in Islamabad—the four Muslims.

That was early last week—Egypt, Saudi Arabia, Turkey, and Pakistan. Obviously, nothing happened. So the next day, the foreign minister of Pakistan had to get on a plane and go to Beijing to talk to Wang Yi. And the Chinese were saying, “Okay, you didn’t do anything. Fine, let’s release a statement.” Very vague, very bland, but at least there was a statement, and they could keep working in the background. So they released that bland statement. Nothing happened, but the back-and-forth continued behind the scenes. The Pakistanis and the Chinese were only operating in the background. But then we had that absolutely ghastly moment—something that’s going to be in the history books until the end of time—the threat to erase a civilization, and the new deadline.

This is when the Chinese, at the last minute, picked up the phone to talk to Iran. Up to that point, it was basically the Muslim countries talking to each other, but not to Iran. The Chinese—this was confirmed to me by a Chinese military source—did something they almost never do. And that shows you they took an enormous risk; now they have skin in the game. Why? Because after all these negotiations among the Muslim countries, they still couldn’t offer anything serious to Iran, and Iran wasn’t even paying serious attention to it.

They started to pay attention when they saw the possibility of a deranged baboon of barbaria actually bombing Iran to smithereens. And that’s when the Chinese also started to pay attention directly. So they told the Iranians, “Look, we will be your guarantor, whatever happens from now on.” What we don’t know, Danny—none of us, and nobody anywhere knows—is how deep these Chinese guarantees go. What do they imply? We don’t know. I was trying to find this out from some of the best Chinese analysts over the past two days. Nobody’s talking about it. So that means there’s an order coming from Beijing: no, we cannot talk about this, because it’s a national security matter.

And they consider Iran a national security matter because of the strategic partnership, because of the deal they made on infrastructure and energy, because they’re a top member of BRICS, and because they’re the most important corridor in Central Asia. There are zillions of reasons. So obviously, the Chinese have to secure their own interests—both Iranian and Chinese. So this is where we are in this. I would say this is a key turning point, because it was the number one argument to convince the Iranians to go to the table in Islamabad. And then there’s another very complicated story, which I’ve been losing sleep over trying to get the real version—and it’s practically impossible.

The best I can tell you, Danny, and all of you, is that there’s no split at the top in Tehran, within the Security Council. There are 13 members on the council—only two are considered reformists. One of them is the president; the other 11 are IRGC-aligned, resistance, and that’s it. They’re going all the way with their war. So there is no split. This is bullshit. This is Zionist propaganda everywhere. Of course, there were a lot of very serious discussions—should we go to Islamabad or not? Is this a trap? In the end, the deciding factor for them to go to Islamabad was China.

But then, when they settled on it—okay, we’re going to send a high-level delegation to Islamabad—they decided to send Araghchi, who was already in negotiations, and Ghalibaf himself. And the

Americans know Ghalibaf; they'd been trying to seduce him these past few months as well. But then, at the last minute, there was another plot twist: Lebanon. When I say "we," I mean the whole planet now knows, because you can actually go on X and see it posted there by the prime minister of Pakistan. Lebanon is included in the ceasefire, in English, for everyone to read. So obviously, immediately afterward, the White House started lying, the Israelis started lying, and the Epsom syndicate conglomerate started lying.

And of course, from the beginning, because the Deep State hated the possibility of this ceasefire table in Islamabad, they went on a mad rampage in Lebanon that shocked the whole planet, literally. But the problem is, once again, they do these things because they can get away with it. Nobody's going to say anything. Can you imagine the UN condemning what they did in Lebanon? No, it will never happen. But that changed the game once again, because the Iranians said, "Ah, we had agreed with everything. We agreed to something we would never have agreed to before. After all, we're in the driver's seat. We were convinced by our allies that we should give it another try and go to Islamabad."

And you change the rules of the game only a few hours after we agreed on the possibility of a ceasefire. And that's where we are now. I'd say these two small items are just details compared to the enormity of the whole thing, you know. It's very, very easy—unblocking the money in Qatar takes a phone call. And to make Lebanon part of the whole thing takes another phone call. Apparently, there was a phone call, but the desk guys don't follow through. We all know they don't follow anything. So how do you rein them in? Yeah. The Iranians have a point. They're playing it very cool. In fact, they agreed to the framework of the ceasefire, which they didn't have to.

#Danny

No, no, they didn't have to. And I guess I'm curious about this—what I've been thinking about, Pepe, in terms of, you know, there are many who are, you know, your informed assessment of what happened with China and Iran contradicts what some people believe happened, which is that China forced Iran. No, no, no, no.

#Pepe Escobar

Never do that.

#Danny

No, no.

#Pepe Escobar

This is not the way they work. Yeah.

#Danny

Yeah. And then the other part of this is, why would Iran do this at all if they don't have to, if they're in the driver's seat? A lot of people who watch the show ask that. And I want to ask you about the idea of diplomatic capital, because in this driver's seat, in this position of strength, they now have an opportunity to go forward internationally through these meetings, with a cessation of hostilities and fire, without giving the collective West the chance to say, "Look at what Iran is doing militarily." Instead, they can say, "Look at our points, look at what we want." What do you think about that? Because I don't think they believe the United States is positioned, or wants to, or would even consider meeting a lot of these demands.

But now it seems like Iran has the opportunity to show who it really is to the rest of the world. I think that's an interesting point. I'm wondering—that's what I've been thinking about when I ask, well, why would you pause? They have the ability to restart, you know, without, as you said, the United States having the capacity to truly rearm. Maybe here and there, but to truly rearm takes years for some of this stuff to be built, produced, and then sent over. So, you know, I'm curious what you think about this idea of diplomatic capital at this stage of the war, with all these other variables, including the prospect of it just restarting anyway.

#Pepe Escobar

They're playing it diplomatically in a very meticulous way, so we can get a sense of the tone of the conversations among the thirteen top figures. It must have been quite something. These are very well-educated people—some of them are military commanders. Ghalibaf is a former IRGC military commander as well. So these people have both military and philosophical education, and they've become high-ranking politicians too. They probably see it in parallel. Number one, they've accumulated an absolutely astounding amount of political capital all across the world in just a little over a month.

They won't stop. They're not going to waste it. On the contrary, they have to build on it. Can you imagine that there are discussions virtually on every continent, even across the West, that Iran is now becoming—or returning to—the status of a major power? Can you imagine something like this only forty days ago? This is already a game changer in itself. So, from the point of view of what we can call global public opinion, there's a consensus—maybe in seven-eighths of the planet—that Iran is not only winning the war but staring down a superpower on its own.

#Danny

Right.

#Pepe Escobar

Can you imagine this in terms of accumulated political capital? Nobody has this nowadays, anywhere—not even in the past few years. China is different; China is a geoeconomic power. But Iran is gaining this political capital on the battlefield, under attack, under fire. Wow. This is the number one test for their emergence. So they're already now not much more than a mid-ranking power—it's between mid-ranking and big power already. The top three are still there, but Iran is ascending, almost reaching their status. They could reach it if they have, let's say, an economic revolution in the next few years—which they might, because they have the manpower, they have the intelligence, and they can rebuild very, very fast, especially with the help of their allies.

So they have to pay attention to this long-term picture and, of course, their new role internationally. At the same time, when they look at the degree of devastation inflicted on them by the Abstan syndicate—which is immensely serious—they have to think about their domestic problems. And, of course, because they know the war isn't finished, this is just a pause. The war will be back. And when it comes back, there will be even more devastation, especially in their civilian infrastructure. So can you imagine how difficult it is for these thirteen guys to put all that in perspective and figure out, okay, where should we calibrate this thing?

How far can we go here? How much can we defer? If we play this diplomatically, are we going to increase our political capital everywhere? The fact that they're going to Islamabad is already being seen all over the world as, yes, they're going there just to show once again that the Americans don't respect anything. So that's very, very good. The problem is what happens after Islamabad, because then the war will be back. And obviously, Baboon of Barbaria already told everyone, yes, we'll be back with all the missiles that nobody has seen—all that crap, right? But the calculations for the Iranian leadership are extremely complex.

From a military point of view, they're not extremely worried because the invisible cities—most of the underground cities, probably 80% of them—are still underground and invisible. So everything is still there. Their missile capability is practically intact, contrary to what Push-Up Clown is saying in D.C. There was a message from the Iranians to the Pakistanis two or three days ago. They said, look, we still have 15,000 missiles—probably more—and 40,000 drones. And these are the latest-generation drones, which are incredibly lethal. They're the Shahids that became Gerans in Russia and are now back in Iran, so they're a hybrid of Shahid and Geran with the latest equipment—jamming devices, you name it.

And, you know, they have warheads with about 90 kilos of explosives. These are absolutely lethal, so they're not worried. And, of course, they can reposition a lot of stuff for the restart of the war. Considering that the war is practically certain to restart, the destruction of Israel can now move to the next stage, since there are no more, whatever—TARs, David's Sling, Arrow, whatever. That's it, it's over. They practically don't have anything left. Their main concern, of course, is how much extra they're going to suffer in this next stage of the war. So that's probably the number one military calculation. Are they expecting anything from Islamabad? No. First of all, because when you compare the 15-pointer with the 10-pointer...

#Danny

I mean, it's like... rated on different planets, I think. Yeah.

#Pepe Escobar

Planets, exactly, exactly. For instance, there's a psychological element to all this. Apparently, they're not going to be in the same room again. They'll be in separate rooms, with separate tables and go-betweens, just like in the previous two negotiations. So nothing has changed. But the fact that Vance is going to be there—and if Vance thinks he has an absolutely mega Netflix photo opportunity, or even a dialogue on the sidelines with Ghalibaf—this might happen. And that would be a face-to-face dialogue that changes everything. Changes everything.

Just like it changed in the past when the Pakistanis were the go-betweens preparing Nixon's trip to China—when Kissinger met with Zhou Enlai in person first, setting it up. And Kissinger was like, wow, because Zhou Enlai was on another level, you know. And then when he came back to the U.S., I said, look, you have to go there, you have to talk to these guys face-to-face. We're in a completely different situation now. But if Vance—after all, apparently he studied at Yale—let's see if he learned something. I'm sure if he learned even a little, he'll understand that he can come out of this with a new stature.

Are the Iranians betting on it? No. But this is something that might happen. And, of course, are they going to deviate from the ten-pointers? No. So this means it's going to be a very, very, very tough game—indirect dialogue again. Are the Americans ready to compromise? From everything we've been hearing, Danny, I don't think so. They might compromise on alleviating sanctions at the UN, because that's not directly an American decision. It's a UN Security Council decision. If the Americans don't vote, okay—no more UN sanctions. But American sanctions, they're forever. We all know that, right? Please, go ahead.

#Danny

Great points, Pepe. The United States has been massaging the idea of sanctions relief in other instances, I feel like, maybe to prepare the way to give a little. It really feels like an image problem for the United States, because in the back rooms, they don't know what they're saying, but they're probably saying something to the extent of expletives about some of the things we talk about and how they can't change that. But in public—this is the empire. They cannot be made to look like it's losing. But there's some breaking news, Pepe, we can react to. Yes, go ahead. Our friend DD Geopolitics, following flight radars, said that two Iranian Mahan Air passenger planes are now en route to Pakistan, likely carrying the Iranian negotiating team, although we don't know. Meanwhile, Israeli media reports say that a ceasefire announcement in Lebanon is expected, although I haven't been able to track where that is. So maybe we're getting closer to this.

#Pepe Escobar

This means the Pakistani media was lying.

#Danny

That's not good.

#Pepe Escobar

It's not good at all. The Iranian official and semi-official media were all saying the same thing: they're at Imam Khomeini Airport and waiting. So apparently, that was correct.

#Danny

Yeah, and I guess we'll have to see what transpires from here, Pepe. But, you know, on another note, maybe you could talk about the position of the Gulf countries now. We see the media—they've anointed Iran. I mean, we've seen The New York Times, everywhere you referenced it—Iran is now a global power, a regional power. It has, from this war which the United States has said it has won, come out stronger. Even the most anti-Iran commentary is acknowledging this fact. For example, The Guardian said Iran is wounded but, you know, strategically strong.

You know, there are all these comments about this, but the Gulf countries are still taking a very hard line right now. It seems like they feel embarrassed. I see it all over X—analysts from the UAE, and you see it in the statements from the governments of the UAE and Bahrain. They're all taking a very hard-line position against Iran. I'm curious what you think is at play here for them, given that a lot of these demands Iran has affect them quite seriously—for example, getting rid of the U.S. military presence in the region, which is at the top of that list.

#Pepe Escobar

Well, the first thing—which is already immense—is that the GCC is basically broken. We have two GCC members, Qatar and Oman, who have already declared themselves to be, if not pro-Iran, at least not anti-Iran. They're neutral, and they want an accommodation. This is already huge and very complicated. Kuwait and Bahrain—well, Bahrain is essentially collapsing. Everything of value there, in terms of American installations, is practically destroyed. Our Iraqi scholar friends have been saying for quite a while that this might happen sooner or later: Bahrain will be absorbed by somebody, probably Saudi Arabia, or it could even be reincorporated into Iran. After all, it was part of Iran before. The big, big "if" is Saudi Arabia.

The UAE is practically at war now—against Iran. Not all the Emirates, though. For instance, Sharjah—no, nothing. I'm talking about Dubai and Abu Dhabi. So the Iranians are going to go all out on the

UAE, no question about that. Probably not immediately, but soon. After all, they've already managed to destroy the Dubai business model. The next step will be to hit Abu Dhabi's oil revenues. So this leaves us with Saudi Arabia. Nobody knows exactly what they're planning, and if MBS has already made up his mind to try to diversify his interests and step away from the Abraham Accords, IMEC, all that convoluted stuff—if he does that, it's an enormous risk, because he may lose all his money, which, as we all know, is in London and New York.

The relationship between Saudi Arabia and Russia and China is very close with both. So, certainly, the background talk is heavy, and the Chinese and the Russians are probably telling MBS, "Pay attention to which way the wind is blowing," right? So they're still hedging. What they published officially, I think one or two days ago, is a list of all their installations that were hit and what they're losing. Apparently, the figure is that they're losing the export of about 700,000 barrels a day. So it's not over a million, 1.4 or anything like that, but still—700,000 is a lot. And we still don't know for sure.

#Pepe Escobar

Who attacked the east-west pipeline that goes to Yanbu and bypasses the Strait of Hormuz? That's still not clear. No, no— not at all, not at all.

#Danny

Yeah, Saudi Arabia says it's Iran. Iran says it's not.

#Pepe Escobar

No, the IRGC said, "No, it wasn't us." Yeah.

#Danny

Yeah, and Iran—I mean, Iran has hit Saudi Arabia, and when they hit the refineries, it affected that whole area.

#Pepe Escobar

But not strategically, it seems.

#Danny

Yeah, and it seems strategic, the way they were hitting it, rather than this attack, which was, I mean, crippling.

#Pepe Escobar

Danny, the big joker is, OK, which way Saudi Arabia will lean. Mid-term. Short-term, nobody can tell. Mid-term, right? And, of course, in terms of the Strait of Hormuz—if this new mechanism holds. Will the Emirates resign themselves to paying the toll to export their own oil through Iranian territorial waters? Definitely not. And that's why they are...

#Danny

They're seething.

#Pepe Escobar

Yes. Yeah. They're sitting on a time bomb. Absolutely. And this might explain, from the beginning, why they chose a position of basically aligning with the U.S. and being at war with Iran. There will be serious consequences for MBZ, no question about that. For the moment, this is not the number one priority for the IRGC, but soon it will be. But, you know, the bottom line is: GCC, bye-bye. Internal collapse. Split from the inside.

#Danny

Yeah, now it's looking very bad for the Gulf, especially considering all these talks are going to revolve around issues that affect them—none of them, I mean... It's so interesting what you said earlier about Qatar and Oman. Oman isn't much of a surprise, but it's interesting that Qatar changed its tune so quickly after what Iran did to its energy sector.

#Pepe Escobar

Yeah, hyper-opportunists. When you go to Qatar and interact with some of these people—and I have some friends who've had interactions with members of the royal Al Thani family—they're hyper-opportunists. So that's it. They saw which way the wind was blowing.

#Danny

Literally, in their own country, after Iran hit them there.

#Pepe Escobar

Literally.

#Danny

Iran really, really hit their—uh, I forget the name of the company, but the facility—yeah, they damaged it quite significantly. Rasnafar? I think it's Rasnafar. Yeah, the Rasnafar Energy facility. Yeah.

#Pepe Escobar

So they lost 17 percent of their LNG export volumes.

#Danny

This is immense.

#Pepe Escobar

And, of course, the ripple effects everywhere are gigantic. So after that, of course, that convinced them. Yeah, a little bit of a disappointment. They know what's happening with Dubai Airport. They don't want the same thing to happen to Doha, which now is going to be the number one airport in the Persian Gulf, period. It's already the most modern. It's quite pleasant as a huge airport. And it's going to be number one, even for Qatar Airways' premium business. Emirates—oh my God—and Etihad, they're in deep, deep trouble, both of them.

#Fox News

Yeah.

#Danny

Yeah, I guess, Pepe, as we get toward the hour here, maybe you can talk about how, now that the balance of forces is where it is, this impacts the Russia-China-Iran kind of ascendancy. You've got major power brokers within the decaying collective West anointing Iran as being in this position of global power now. How does that change things overall? Because a lot of people were, I think, pessimistic before February 28th about the multipolar world. Then they saw what happened to Iran on day one, and now, six weeks later, the mainstream media can't stop talking about Iran being a global power. So how does this change things for the rest of the world, really? Because there's the Strait of Hormuz, and then, of course, the bigger developments surrounding these big changes—Iran being part of this, now a major part, maybe one of the leading parts of this changing world.

#Pepe Escobar

Well, it's another history lesson, isn't it, Danny? The multipolar world would never be born in BRICS meeting rooms. It's what they've been talking about over and over again at all these summits, with the Sherpas and all that. Well, I've been following this closely. I was a firm believer that this would

happen. I made a lot of effort to explain the importance of the role of BRICS in the multipolar world, but no—the multipolar world has to be born through a major conflagration, on the battlefield, under fire, against all odds. And then you turn the game around in 40 days. This is what nobody expected, but it's exactly what's already happening.

And of course, behind several levels of support, are Russia and China. It's crazy, because I'm in the last stretch of my life as an analyst, a reporter, a nomad, and all that. I would never have believed—could never have believed—that one day I'd be talking about the actual primacy of a new Primakov Triangle: Russia, Iran, and China. Primakov's original triangle was Russia, India, and China when he coined the term at the end of the millennium. So now we have in front of us this new Primakov Triangle as the real driver of, or on the way to, a more solid path toward multipolarity. And it has to be under fire. The only language the empire understands is force, and they will never admit resistance—sovereign resistance.

For instance, in the case of Russia, they have to respect Russia because it's a nuclear power. The Americans never see Russia as a country of sovereign resistance against the West, which every century tries to go there and smash Russia to bits. But in the case of Iran, it's much more complicated because it's not a nuclear power. The Americans said, "We'll just go there over a weekend, finish it all," and look what's happening. So, in terms of a historical game changer—okay—people will be studying this until the 25th century. And it happened so fast. Until a few weeks ago, we could basically agree with the judgment of Emmanuel Todd, from two years ago, when he published his book **The Defeat of the West** in France.

The main thesis of the book was that Trump would have to manage the strategic defeat of the U.S. in Ukraine. Now, wow—Trump will have to manage two strategic defeats: one in Ukraine and another in Iran. It's too much for the brain of a four-year-old, you know? He doesn't even understand the dimension of the whole thing in front of him. So what do we have? We have these childish outbursts, these tantrums. But the big picture is that even people who are part of the Western system are saying, "Look, now it's another story. Now we have another big power emerging." Yeah. Danny, how can he possibly sell this to domestic public opinion in the U.S., not to mention the rest of the planet? He can't.

#Danny

No, not only can he not, Pepe, but I don't know if you saw the reports about the domestic situation in the United States because of this war. Inflation—well, I saw Melania saying, "I had nothing to do with Epstein." Oh, yeah, people were joking, saying Trump lost to Iran so badly that now he's trying to bring up Epstein again to distract people from it.

#Pepe Escobar

There's a degree of truth to that, by the way.

#Danny

Every consequence has come from it, and one of the biggest consequences for people in the United States has been the 3.3 percent increase in inflation over the last month. Gasoline, in this inflationary environment, has seen a whopping 21.2 percent increase. So people are— I mean, China was sharing videos of a young girl just crying her eyes out because she had to pay something like five-plus dollars a gallon for gas and didn't have money for rent. I mean, this is the environment that the Trump administration's—uh—decision created. People call it a war of choice. I don't know. I think the United States empire, at the end of the day, doesn't really see war on Iran in general as a choice, but certainly the timing and the way it happened were definitely a choice.

And that's what has led to these disastrous blowback conditions. I don't know how the Trump administration comes back from this as an entity, or politically in the future. Nonetheless, it seems like Trump and his team want to really supercharge these so-called negotiations to get whatever they can from them. I just don't see that. This could go on for a very long time, or it could just not happen at all. I don't think there's an in-between. I don't think there's an in-between.

#Pepe Escobar

Let me ask you, Danny Haiphong, as the host: what do you think the Trump administration could actually get, considering they have zero cards in their hand?

#Danny

The only thing the Trump administration can get is if they have—well, I don't know, I haven't seen it yet in two different terms of Donald Trump—but if the Trump administration can hire someone who can make a defeat look like a victory through some kind of PR spin, that's the only thing, I think. Because they're going to have to. I can't imagine Iran is going to—uh—even forget capitulation, but even concessions. I don't know why Iran would consider conceding anything other than some version of what it's already laid out to the United States. Maybe it could be written differently, but nonetheless, the tolls, the Strait of Hormuz, all of this—I don't see Iran, uh, the military presence in the region—uh, they'll be like, "Oh, you can spin it however you want, but you've got to do it."

And Iran is not going to stop demanding it or stop talking about it that way. So really, the United States has nothing—other than maybe, hopefully for them, for the Trump administration—they better hope they can find a way to actually communicate that they've somehow won from a massive defeat. But we haven't seen that. All they can do is thump their chests and talk about how big and powerful they are, and everyone kind of side-eyes it because it doesn't make any sense. I feel like we're going to get a lot more of that coming up. And who knows? We could very well be in a military situation again—a hot war—soon. I tend to think, though, you know, Scott Ritter and Larry Johnson, they were on my show, and I tend to believe them when they say it's unclear whether the U.S. even has anything left to target.

And if they start targeting what they claim they're going to target, well, it's kind of game over. Personally, I believe that's part of the reason why China entered and Pakistan entered—because they saw the writing on the wall. If the United States even hit one iota of Iran's infrastructure that it said it was going to wipe away, then Iran would have done the same thing back to the Gulf countries. And then what do you have? You have a complete disaster for not only the global economy but for the players involved—the United States, Pakistan, who knows. Some people were saying, and I believe this too, that they were scared Saudi Arabia was going to invoke the mutual defense pact, and they don't want any part of that. So, um, anyway, it's a very bad terrain. I feel like from the United States' perspective, it's just a bad situation.

#Pepe Escobar

What you just mentioned, Danny, is part of Pakistan's calculations. They cannot allow anything to happen that would force Saudi Arabia to call their mutual defense pact. We're terrified of that possibility. Absolutely.

#Danny

Yeah, I mean, how—yeah, well, I mean, it's a disaster to have to dive into. It was for the whole Gulf countries, you know, these countries run by monarchies that just sit on top of their main global commodities—the oil and the gas and all that—and they don't have anything else. They barely even have any domestic support, and they rely on chaos, they rely on the U.S., and they rely on Israel. Very, very bad position to be in when the U.S. and Israel did this with Iran.

So overall, yeah, from the U.S. perspective, it's not spin. It's not like, "Oh, this is trying to say that Iran has just absolutely bludgeoned the United States." The truth is, the U.S. kind of did this to itself, and Iran just had the capacity to make it happen—to resist. Yeah, to resist, and they did. And now the U.S. has to face and bear the fruits of what that means, which is trying to weasel its way out of a mess it made on its own. But I don't see it. I don't see it. That's why the next few days to a week or so are going to be very interesting, I think. But any final comments, Pepe? I know we're over the hour.

#Pepe Escobar

So, any final comments? No, no, that's about it. We just have to wait and see if something comes out of Islamabad. None of us is betting that anything will, but maybe a rabbit out of a hat at the last minute. Yeah.

#Danny

Yeah, I'll just put up some of these super chats. You should add Iranian Lego videos to your intro and outro. Yes, Lego videos—you bet I would, but I heard people are getting censored for putting them up on YouTube, so that's why I haven't done it yet. Yeah, apparently they censored the Lego guy's account somewhere—I don't know if it's on YouTube or somewhere else. So everybody on YouTube—on YouTube, everywhere—the Lego videos, right? Right, right. So thank you all for the generosity. But without further ado, everyone, I want you to know that you can go to the video description and find Pepe Escobar's Telegram and X, as well as a link to the article we shared today. And be sure to hit the like button, be sure to subscribe—all of that. Check the video description to support this channel and find all the sources. I'll be back, but I'm traveling soon. I'll let you know what's going on, and I'll publish some interviews in the meantime.

#Pepe Escobar

Are you heading to Asia?

#Danny

Yeah, yeah, yeah. And I'll announce what's going on when I arrive. All right, everybody, hit the like button as you go—that helps boost the conversation. I'll see you all again soon. Bye-bye.

#Pepe Escobar

Thanks, Nate.