Col. Jacques Baud: EU Destroys Trump’s War Fantasy

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#Nima

Hi, everybody. Today’s Monday, April 13th, 2026, and our dear friend, our brother, Col. Jacques Baud, is here with us. Welcome back, Colonel.

#Jacques

Yeah, hi. Hi to everybody, and thank you for inviting me again on your show. Thank you.

#Nima

Carol, I want to start with—you know, since last week we talked, just imagine how things have changed. It's unbelievable. We had the negotiations, then we had ceasefire negotiations, and the talks collapsed. And now we have Donald Trump announcing that the United States is going to blockade ships entering and exiting Iranian ports—today, April 13th, at 10 a.m. Eastern time. Here in Brazil, that’s 11 a.m. This is a new escalation.

The whole concept of C-SPIRE was based on trying to make some sort of sense out of this madness—the war against Iran, and really the whole Middle East being drawn into it. And then he came out with this new idea of putting pressure on the global economy through the blockade, because the Iranian response is going to be that they won’t let anyone use their ports in the region. And the other point is the Bab el-Mandeb. Bab el-Mandeb isn’t in the game yet, but it’s going to become part of the war soon. What’s your understanding of this new strategy—if we can even call it a strategy? It’s more like a tactic on the part of Donald Trump.

#Jacques

Well, I don't think it's a new strategy. It's part of the same strategy. I mean, we're still talking about peace through strength. And this is, as a matter of fact, as I’ve explained many times, just a variant of blackmail politics. That's all. It’s what you had at the end of the 19th century and the beginning of the 20th century—the so-called gunboat diplomacy—meaning that you demand something from an

actor, and if they don't comply, you send your gunboats to bomb them. I mean, that's exactly what we had in China at the end of the 19th century. This is the so-called gunboat diplomacy. So there's nothing really new here. We've seen, in fact, exactly the same pattern since the very beginning of the Trump mandate. The so-called "art of the deal" is exactly that.

You just put a solution on the table. Of course, it's your own solution—I mean, Trump's solution. You put that on the table, and then you put the gun on the table, and you say, "Well, you can choose: either you take my solution, or I shoot at you." This is, in essence, blackmail. And that's exactly what we've had so far. That's how he managed, in quotation marks, to "solve" I don't know how many—seven, eight, nine—conflicts. You know, solving a conflict isn't just about blackmailing people into silencing the weapons. To solve a conflict, you need to address the root causes in order to have a lasting result, not just a temporary one. The problem is, Trump is probably the caricature of an American who relies on quick results in everything, but never on long-term ones.

That's exactly what we have. We knew that. I mean, I was very skeptical that this negotiation would last long because—and here we have to make a distinction—there's the ceasefire on one hand, and the 10-point plan that Iran put forward last week, which was essentially what Iran wanted to negotiate, versus the 15-point plan that the U.S. had in mind. And those two plans are completely incompatible, because the 15-point plan, in essence—well, even if we don't know exactly what's in it—some Israeli papers published parts of the content. Assuming those are the real points, by the way, if we read those 15 points, it's nothing less than a capitulation of Iran.

On the other hand, if you read the 10 points produced by Iran, it's nothing less than a capitulation of the U.S. So we knew those two plans were completely incompatible. Now, the interesting thing is that Trump himself said the Iranian proposal was workable—meaning we could use it as a basis for discussion, which is, in essence, a good start. And eventually, by the way, it's interesting to see that if we listen to J.D. Vance, he said there were only two points still contentious. One was the issue of the Hormuz conflict—the Strait of Hormuz. I mean, obviously, who controls the Strait of Hormuz?

And for the Iranians, it's clear that it must be Iran. The second point was the nuclear issue. Here again, we have the U.S. wanting to remove every single nuclear capability from Iran, while Iran insists on its sovereign right to have its own capacity to refine or enrich uranium and to maintain, of course, some civilian uranium reserves—or nuclear facilities for civilian purposes. In fact, since the early '90s, Iran has never deviated from that. We have to be clear about this. So the Iranian position is very solid; the U.S. position is much less so. It's not just driven by hubris, we can say—they need to have the region under control. That's all.

But there is no substantial point. Anyway, we knew that this negotiation—it's also interesting to see that all these negotiation rounds happen so quickly. Whereas in the past, during the Cold War, when we had negotiations about the reduction of conventional weapons or medium-range missiles in Europe, or nuclear weapons, all those negotiations took months or even years before they achieved their objectives. Now we're in a world where we expect results within two days: either you accept it

or you don’t. If you accept it, we strike you; if you don’t, it’s always the same stick-and-carrot strategy. That cannot work, especially in the Middle East.

You know better than I do that you can achieve whatever you want in the Middle East if you do it properly—if you follow the rules, the local rules, take your time, talk to people. Then you can achieve whatever you want. And we know that Iran is not a threat; we’ve discussed that many times. At the end of the day, the problem isn’t whether Iran is a threat or not—we know it’s not. What we need is insurance, a guarantee that it will remain not a threat. That’s what we need. Of course, we have this bad faith from Israel, because Israel will always consider all its neighbors as potentially bad, nasty, aggressive—things like that. That’s the rationale for their own aggressiveness.

But let's put Israel aside, because the negotiation was between the U.S. and Iran. What strikes me is the inability of the U.S. to understand this mentality—to realize that if we have a negotiation, we have to sit together for days, weeks, maybe months, maybe years. This cannot be achieved within two days. The expectation of a quick result, within one day or so, is unrealistic. Anyone with even the smallest knowledge of the Middle East knows it’s not possible, especially if you put pressure on people. Remove the pressure, and you’ll get better results. Gunboat diplomacy doesn’t work in the Middle East, whether it’s Iran or anyone else.

It’s exactly that. You know, you’re an engineer—you know about non-Newtonian fluids. When you put a lot of force on this kind of fluid, you can’t go through; it becomes very strong and resists. But if you go very slowly, you can move through it easily. So it’s the same thing: if you want to negotiate in the Middle East, you have to consider the mentality there. And I’m not pointing specifically at Iran—whoever it is in the Middle East, I mean not Israel, because they don’t share this mentality. They’re not part of that world; culturally and historically, they have nothing to do with the Middle East. But for the rest of the region, it’s the same. You need a non-Newtonian approach to diplomacy. If you don’t apply pressure but instead go calmly and talk to people, you’ll get better results.

If you act like Trump, there’s absolutely no chance you’ll achieve any objective. I think that’s a very important point. So that’s why I wasn’t surprised not to have a result. What did surprise me was that they expected to have a result within one day—that’s the surprising part. I expected that when Trump decided on a two-week ceasefire, those two weeks would be used for negotiation, meaning it wouldn’t all be concentrated in a single day. We would sit together for two weeks, discuss the issues, and have a real negotiation—just like when you go to any market in the Middle East to buy food or whatever. You have to bargain, you have to talk, and in the end you’ll find a solution, you’ll find the right price.

That's exactly how negotiation should work. And I expected those two weeks—the ceasefire—to be used that way. Now, when we talk about the ceasefire, of course, we have the spoilers. And as usual, Israel is the spoiler. This is probably the reason the whole thing collapsed, because remember, the aim of Israel—and basically everything Israel does—is to ensure a permanent U.S. presence. I mean, they’d like the U.S. to engage in a war against Israel’s neighbors. They don’t have

the capability to fight all those neighbors themselves, so they'd like the U.S. to do it for them. That's why they keep provoking; they always create a situation where the U.S. has to intervene. So far, the U.S. has intervened without force—diplomatically, essentially.

But now, with Trump, Netanyahu has understood that he has a guy who is very—let's say—not very deep in his knowledge or approach to things. He's very emotional, very superficial, and he wants quick results. And that's the ideal president of the United States, as viewed from Netanyahu. That's the reason why, in fact—as the New York Times said—he didn't order the U.S. to do that, but he created a situation where the U.S. could only say, "Well, that's a good opportunity." And, you know, remember that Donald Trump is basically a real estate agent—like Steve Witkoff, like Jared Kushner, by the way. They're all real estate agents, meaning these are people who are always looking for the right opportunity. They're people of opportunity.

They're not people of long, drawn-out discussions. When you're in New York—well, I don't have much experience in that business, but I can assume that in New York you have to make very quick decisions, and you have to push people into very quick decisions. So you don't have much time for negotiations or dialogue or any of that. You just go and say, "Take it or leave it." It's all a matter of opportunity. And I think that's exactly the same rationale that pushed the U.S. into this conflict. It's the same rationale that explains why the U.S. is incapable of talking to the Iranians—or to anyone else, for that matter. And that's where we are. Now, this is far… it's a little bit—how should I say—I can't find the word right now. I have the word in German, but not in English.

I was disappointed—disappointed because we had, on both sides, I mean both Iran and the U.S., this idea that it would probably be a good idea to create a positive environment for dialogue, and therefore this ceasefire. Now, of course, the problem is that Israel is a spoiler here, in the sense that they don't respect international law. They were not really involved in the decision to make the ceasefire, because that's something that apparently had been discussed between the U.S. and Pakistan. I'm not sure either whether Iran was very involved in designing that ceasefire. In any case, the idea that Lebanon should be part of the ceasefire makes sense, because at the end of the day, the goal was to have a kind of appeasement in the whole region, not just in specific areas.

And thus allowing for, let's say, a space for discussion. And that was confirmed, by the way, by the Pakistani prime minister—that Lebanon was part of the deal. It was denied by Netanyahu. It was denied by Trump. But with Trump, you never know exactly. With Netanyahu, you know exactly that he doesn't want a ceasefire. And so this tendency—this propensity to always look for a military solution, more destruction and all that—is something that disappoints me. I mean, no, it's not disappointing because we expect that, but it frightens me in that sense, because it means there's no way you can achieve any agreement with Israel.

When Israel is in the equation, it's not possible to have an agreement that leads to peace. That's the problem—they don't want peace. And that's what the Europeans are starting to understand. But it's interesting that they're only now beginning to realize it, because of course they're suffering from it.

It has consequences for the Hormuz Strait and all that, and therefore the Europeans are starting to feel the impact. But Netanyahu is still the same Netanyahu who responded to the Al-Aqsa Flood operation in 2023. So it's the same story. Yet no European country reacted to the massacres carried out by the Israelis. Now they react because they're concerned—they're somehow in the loop. So this is a very disappointing situation, but it was, in a way, expected.

#Nima

Carl, I think we have a combination of disastrous policies and strategies—disastrous tactics, really. Because on one hand, as you mentioned, and you correctly mentioned, Israel doesn't want peace. Israel is not seeking peace. Right after the announcement of the ceasefire, they attacked Lebanon. We saw what happened in Lebanon. And on the other hand, you don't see that in the Trump administration. Look at the Trump administration—who are these people? They basically don't know the basics of negotiation and diplomacy. They don't know anything. Look at the JCPOA, look at the process that led to an agreement between the United States and Iran. It's a long, you know, technical and political process.

We're negotiating for hours, days, months to reach some sort of agreement. And look at the recipe the United States had under the Trump administration—it's unbelievable. The framework is so big, it' s gigantic. It's impossible to negotiate this way. And look at the Iranian side: they had everything—political team, legal team, economic team—the people who were running the economy of Iran, who knew the economy of Iran. They were all prepared to at least define the framework of negotiations. But these people—I'm talking about J.D. Vance—he was literally there saying, "You're going to accept it or not, and we're going to leave the room." That's the problem.

I don't see anything good happening as time goes by. I think Europe recognizes that. They see the war on Iran as a swamp, and they don't want to get involved in it. Even with the blockade, we've learned that the government of the United Kingdom—well, we know how close the UK government is to the United States. They're pretty much the same when it comes to foreign policy. And we had Australia saying they're not going to be part of the blockade, that they're not going to do anything to help the United States. And Donald Trump himself—it's unbelievable what he's doing. But what is your take? Because it seems like we're heading toward disaster.

#Jacques

Yes, they're heading for disaster, but don't expect too much from Europe. The reason Europeans don't want to be involved in that is, first of all, they got involved in the Iraq–Syria conflict in the early 2000s. I mean, a lot of Europeans were part of Operation Iraqi Freedom and all that. And in the end, Europe paid the price for it. It paid the price of terrorism, the price of immigration, the price of everything. The US only paid a financial price, but the Europeans paid the economic and political price. So they have that experience. They know they have nothing to gain by participating in a conflict started by the US. The US starts conflicts for its own interests, not for the interests of Europe.

I mean, Europe or whoever—when they started this war against Iran, they didn't consult anybody. They didn't ask the Europeans whether they'd be happy or not. They just did it. So now the Americans are scared about what they've started, and they're trying to involve others to solve the problem. And the whole issue of the Strait of Hormuz isn't completely new. Last month—you may remember—Donald Trump was bragging that he'd be able to open and escort tankers through the Strait of Hormuz. Eventually, the US Navy advised against it, and they didn't dare to do it.

Remember, they had the same problem in the Red Sea with the Houthis, and eventually it led to a catastrophe. In May 2025, I think, they ended up reaching an agreement with the Houthis that the Houthis would not attack the US Navy fleet. At the same time, the US would not attack the Houthis, even if they fired at Israel. Just to show—Americans are only brave when they have enough equipment. If they have dominance, they're brave; if they don't, they're not. That's the difference with others, who are brave regardless of the balance of force. But for the Americans to be brave—and the Europeans as well—it's the same thing. They're brave only when they have superiority.

But bravery isn't a matter of balance of force; it's a matter of determination. And that's exactly what we have here. The Europeans, as I said, don't want to get involved in a conflict they didn't start—one that could affect their own energy supply, by the way, and not just energy, because we're talking about fertilizer, helium, and other gases, things like that. So it's not just about oil and gas. Anyway, the Europeans don't want to do that. But at the same time, they don't have the means to do it. They talk bravely—you have Macron, for example, bragging that he'd send troops to Ukraine and all that—but they don't have it. They don't have those assets.

Their fleet isn't built for this kind of conflict. They're not able to go and, for instance, escort tankers through the Strait of Hormuz or keep the Strait open. They just don't have the means to do that. If you want to keep the Strait open, it's not just a matter of having a few vessels in the Gulf. You also need control over the shores of Iran—and the shores of Oman are probably easier, in a certain sense—but you still need control over Iran's side. That would require a lot of troops, and nobody is ready to do that. So militarily, keeping the Strait of Hormuz open is a much more complex issue than you might think. As a result, the Europeans don't want to spend all their energy on that.

And for another reason as well, basically, to solve the problem you just need proper negotiation. I mean, remember that before the 28th of February, the Strait of Hormuz was open—everybody could go through, there were no fees, nothing. The new situation created by the U.S. has caused this problem. So, to solve it, we just have to reverse that situation. That's all. It doesn't require a lot of troops or people losing their lives over the Strait of Hormuz. It's just a matter of good negotiation and common sense. That's all. So that's one aspect. Now, the problem is that we have, both in Europe and in the U.S.—especially in the U.S. right now—but you can see, of course, we're talking about Iran, and that's the reason why we can focus on Trump.

But if we talk about other theaters of war—namely Ukraine—we see the same kind of decision-making in Europe. Meaning that both in Europe and in the United States, we have an extremely irrational, totally emotional decision-making system. It's not really a process, because a process means that when you make a decision, you take input from different sides, you balance it, you evaluate options, and so on. Apparently, that didn't happen in the U.S. regarding Iran. What we have here is basically hip shooting—you know, it's hip shooting. And that means you react instinctively to things; you don't think about what you're doing. You just pull the trigger, period.

You think afterwards. That's exactly what we're witnessing right now in the U.S. Trump is a hip shooter, and now he starts to think. Now he starts to understand that he's trapped himself in a situation he can't get out of. And that's exactly the problem. Now, this was expected. I mean, I'm not the only one—a lot of people on your channel have said exactly the same thing. If you're just a simple, honest, and, I would say, scientific observer of the situation, you can come to the same conclusion. When you've taken all the facts together, you come to the same result. This outcome was totally expected. I still don't understand why, in the White House, nobody advised the president not to do it—or at least not strongly enough, not with arguments strong enough to make him change his decision.

The whole thing is based on wind, basically—nothing else. But we have exactly the same thing in Europe. You see, when you talk about it, of course there's a common point, which is the energy supply. The same thing happened when Europe decided to cut its ties with Russia and wanted to diversify its sources of energy. Well, we see exactly what that "diversification" is about—now it's just the U.S., period. So we're talking about people who don't have much depth in their thinking. They don't understand different options or strategies; they just decide, period. They have a good guy and a bad guy—and the good guy, you have to shoot at him, period. It's as simple as that. The problem is that, with time, you realize the good guy wasn't really the good guy, and the bad guy isn't exactly the bad guy either. So that's where we are.

#Nima

Karol, I think one of the escalations with the blockade would be how China would react to it. We know China is dependent on the Strait of Hormuz, and since they're considered a friendly country to Iran, they've managed so far. It's been challenging for them, but not a big problem, because their tankers could pass through the Strait of Hormuz without difficulties. But if Donald Trump imposes this blockade, it's not only China—other countries will also be affected by it.

#Jacques

Well, don't overestimate China's dependency on Iran's oil. Remember that China is about 84–85% energy independent. I mean, they have their own sources of energy in their own country, meaning they depend only about 15% on external supply. Part of this external supply of energy comes, of

course, from Russia, which is a very strong ally and provides energy through pipelines and things like that, which cannot be subjected or...

#Nima

Sorry for interrupting. They have other ways of communicating with the Iranians as well.

#Jacques

Yes, I know. I totally understand that. But if you look at where they receive their oil from and the related products—well, I think they depend on the Gulf for only about 4% to 6%. Indirectly, probably a little more, because they get some oil from Malaysia and places like that. I don't know if Malaysia resells oil it receives from the Gulf area—I'm not sure. But in any case, China's dependency on Gulf, or Persian Gulf, oil is probably around five to six percent.

So it's not critical for China, because China has diversified its sources of energy. They even buy oil from the United States, so this isn't a big deal. In fact, China is in a better position than Europe, for instance. Also, because China has very strong ties with Russia—and Russia is just next door—there's no real geopolitical problem, at least for now. So China is not the most endangered country here. In addition to that, China can still have some leverage over the United States.

We've mentioned many times the issue of rare earths—some strategic materials such as tungsten, for instance, and things like that—on which the U.S. is extremely dependent. And China can basically open or close the tap on this. That has already happened with magnets—permanent magnets or natural magnets—and with some rare earths. The Chinese have already blocked the export of rare earths to arms manufacturers, I mean Western and U.S. arms manufacturers. So China has a lot of leverage. The problem is not so much that China is aggressive; it's a peaceful country, meaning they can still find other ways, and that's probably the best approach. We also saw that through the negotiations, because the idea from Pakistan to mediate between Iran and the United States was also supported by China.

And apparently, the whole idea of having a ceasefire was also worked out between China and Pakistan. That means China has leverage not just in terms of how many warships it can move, but also in terms of how many rare earths it can restrict and how many peace initiatives it can launch. In fact, China has a broader spectrum of activities—a greater range of action—to improve the situation than the Western countries do. Europe is, in fact, the big loser in all this, because we see that it has absolutely no say in what's happening. Again, the ceasefire is the result of Chinese, Russian, and Pakistani efforts. Of course, it's fragile, but at least it's an initiative. Europeans have absolutely no say in it; they're just dealing with the consequences and can't really act to prevent or influence it.

Russia and China have, as I said, this kind of diversification of supply, meaning they're less dependent than Europe. Europe is basically cornered in this situation—no diplomatic activity

whatsoever regarding it, no credibility in the Middle East, absolutely no leverage on Israel. They tried to do something, like Spain preventing the delivery of weapons or ammunition to Israel and things like that, but it's a political gesture with no real consequence on the ground. Nevertheless, it shows a political stance, which is already important, but it has no real impact on the whole situation. So Europe is basically completely isolated in that regard.

It can only endure the consequences, that's all. So I think Europe is a big loser in the whole situation. Of course, the U.S. is a strategic loser in the sense that its credibility has completely collapsed. This idea of engaging in a war without the slightest idea of how to end it shows a lack of strategic thinking. And therefore, it raises the question: why should we continue relying on U.S. security guarantees—"guarantees" in quotation marks? These questions arise, of course, in the Middle East, but not only there. And I think there's an interesting point that we've barely seen discussed in the West.

I mean, nobody mentioned that. It was a visit by the leader of the Taiwanese opposition, the Kuomintang. This is a party that favors a rapprochement between Taiwan and China. The leader of this party made an official visit to mainland China. The reason I mention this is that one of the ideas discussed around this visit, which seems to be gaining importance in Taiwan, is whether the U.S. is a reliable partner in terms of security—because they're very present when it comes to creating a poor political environment that makes things worse.

The Americans are very good at that, but they're not very good at supporting their so-called allies when needed. That was exemplified in the Middle East, where everybody relied on the U.S. presence—and in fact, they didn't do anything. Those high-tech solutions they had, like the THAAD system and the Patriot, were made ineffective within hours after the conflict began. Even more striking was the fact that the U.S. took one of the THAAD systems from South Korea to bring it to the Middle East to protect Israel. And that shows that...

#Nima

It was two of them, Carl. Sorry? Two of them—two of them.

#Jacques

Okay, yeah. But it just shows that the U.S. doesn't act in favor of its allies—it acts in its own favor and in the favor of Israel. Period. All the rest is negligible. And that also raises the whole issue of NATO, because at the end of the day, the whole idea of NATO was to have the U.S. involved in a conflict if a war broke out in Europe. And now we see that the U.S. doesn't. I mean, if it's not in its interest to fight or to engage in a war, it won't do it. It won't do it for the nice eyes of Emmanuel Macron or whoever. If it doesn't suit the Americans, they won't do it. They'll just say, "Well, that's your problem."

And that's a little bit what we see now in the Middle East. All that will help reshape the relationships between the U.S. and its own allies. This question, by the way, was raised in South Korea, and apparently the same question is now coming up in Taiwan. So we see that beyond the Middle East and the whole Iran affair, something much deeper is happening. The U.S.—and in fact, to some extent, this is related to Trump's policy and what he wanted to do—wanted to make America great again. He never said "make the West great again" or "make Europe great again." It's "make America great again," period. I'm not sure he'll achieve that—that's another discussion.

#Nima

The opposite would be achieved, I think. Sorry? The opposite would be achieved.

#Jacques

So far, it's not going in a good direction. But anyway, this goes a little bit beyond today's topic. In any case, the whole idea behind this is to make America great again, not anyone else. Meaning that they'll use or misuse their allies, but they won't engage unless it's necessary. Remember what happened in March, when Trump didn't want to commit U.S. naval forces in the Strait of Hormuz but asked his Western European allies to go there to keep the strait open? That's exactly it. When he sees that the problem is too big for him, or that he won't be able to solve it, he just hands the problem over to the Europeans or whoever his allies are.

So these are not allies. And that's exactly what this whole affair shows. It also shows that the West, and especially Europe, is in fact extremely weak. Because the whole power of Europe—the perceived power of Europe—came, militarily speaking, from this idea of belonging to NATO, which is a very powerful, the most powerful, military alliance and things like that. But it's only powerful if the U.S. is part of it. Otherwise, it's meaningless. That's the issue. And now they're starting to understand that unless there's a very large war where the U.S. needs to be involved, NATO is useless.

And in fact, that's exactly what I've been saying since the very beginning of the war in Ukraine. NATO was not made for this kind of situation. As a result, it's useless for solving the situation in Europe. That's why they had to make those bilateral security agreements between Ukraine and individual states like France, Slovakia, and others in Europe—because you couldn't commit NATO to that. NATO is essentially the U.S., and the U.S. didn't want to be directly involved in the conflict against Russia. So, NATO is useless for this kind of conflict. And if you want to rely only on Europe's own military resources, it's just not enough.

And that's exactly what we see with the Strait of Hormuz. The losers are definitely the Europeans—definitely, without any doubt. The U.S. is a strategic loser in that sense. I mean, they'll probably manage economically to solve the situation, but because they're not as dependent on that oil as the Europeans are… although we have to be very careful about this, because of the kind of oil. You know, the U.S. is one of the biggest exporters of oil—I think the biggest—but it's also one of the

biggest importers of oil. So it exports oil, but it also imports oil. And the reason for that is that what it exports is not exactly the same kind of oil that it imports.

And the product they import is something they need, because what they export can be used for other purposes than cars, for example. I mean, I'm not an expert in all that, but apparently the oil quality you get in the Middle East is suitable for what you put in your car. I mean, it needs to be refined, obviously, but the quality then fits what you can use in your car—to make it extremely simple. So that means there's a kind of dependency, but the U.S. has some as well. I mean, they can also buy Venezuelan oil and so on. So they have alternatives. Europe has no alternatives.

#Nima

Yeah. Carl, I think the blockade is the real problem. Let's assume Donald Trump succeeds in blockading the situation—controlling what goes in and what comes out. The reality in Iran today is that they produce more than 90% of their own food. They're not that dependent on imports. But it's the opposite for the GCC countries—more than 90% of what they consume comes from outside. That's hugely problematic for them. You remember, before announcing the ceasefire, Donald Trump literally said, "Thank you, all these Arab states, GCC countries, for helping us in this war." And this is news, I think, because the Wall Street Journal just moments ago reported that regional countries are racing to bring the United States and Iran back to the negotiating table.

You know, you remember right after the announcement, some of these GCC countries were saying, "No, we're not part of that." Then they started attacking Iran. Basically, I'm talking about the UAE, for example, attacking Syria and Iran. Right now, when it comes to the blockade, I think they're feeling the heat—they're feeling the consequences of this escalation. Because the reality is, as Antony Blinken said yesterday, they've drastically depleted the offensive capabilities of the United States. So they can't start a new war with the same strength they had before. And that reality is influencing their policies and the continuation of the war. What's your understanding of that?

#Jacques

No, no, absolutely. You're totally right. I mean, you have to remember there's a resolution—I think I already explained this on your channel—Resolution 3314 from December 1974.

That explains, in the case of aggression, how to define the aggressors. And if you read that resolution, you can see that all the GCC countries that supported or allowed the U.S. to use bases on their territory to attack Iran can, in fact, be defined as aggressors. That's very clear. That also applies, by the way, to all the European countries that offered their own bases or territory—like Ramstein, Istres in France, and so on. We have all these air bases that were used as alternatives to the Middle East bases by the U.S. to supply and attack Iran. All these countries can be considered aggressors by Iran, legally. It's totally legal. They are aggressors, period. There's no discussion about this. Now, the question is, of course, that it has some consequences.

And now, as you rightly said, they're starting to feel the heat, because it's not just a matter of receiving a couple of missiles on their air bases—now their own economy is at risk. And of course, you have this blockade that Trump decided, but there are other aspects as well. I mean, remember that most of these countries—think of Dubai, for instance, the UAE—they rely heavily on tourism. And now I'm not sure people want to go on vacation to Dubai. That's a large part of their GDP, especially in the UAE. So here we see that the consequences of the war directly affect the economic capabilities of these countries. And of course, now the problem is that they need to reverse course, and that's a bit of what they're trying to do.

Now, it's interesting—as I said before—what you said is perfectly right: this blockade of the Strait of Hormuz would affect not just Iran, but also the U.S.'s own allies. And that shows exactly the problem: the U.S. does what suits itself. It won't do things that suit its allies. They're not fighting for their allies; they're fighting for themselves, regardless of whether it's rational or not. It's simply a fact that they decided so, and they want to do it—and the rest have to pay the price. They don't care at all. So, as you said, the rest of the Middle Eastern countries will pay a heavy price for this. Remember when the U.S. started to attack—I think it was the U.S. who attacked—the desalination station.

#Nima

It was an Israeli-American attack. We learned that later on. Exactly.

#Jacques

But you see, if you look at the importance of the desalination installations, Iran depends on only about 2% of its water from desalination. But if you look across the Persian Gulf and strike a desalination installation in Saudi Arabia, all these GCC countries depend on 90 to 95% of their water from desalination. That means the impact of such strikes would be devastating for them, while for Iran it would have only a marginal effect. In addition to that, we have exactly the same situation with Iran as we had with Russia when those massive sanctions were imposed in 2022. The fact is, these countries have already experienced—and are still under—sanctions for decades. They've adjusted their behavior, their economic behavior, I mean, in the sense that they've found ways to bypass those sanctions somehow, or at least to live with them.

That was very clear. I'm not totally aware of the situation in Iran itself. If you look at Russia, for instance—before the sanctions, Russia was a net importer of wheat. And today, Russia is a net exporter, probably one of the major exporters in the world. Because once they were under sanctions, they had to find a solution. What they couldn't import, they had to produce themselves. That's also true with potatoes, for instance. It was the same with apples, pears, and cheese. Since they couldn't import them, the Russians started to make them—they hired people from Switzerland, from France, and so on—to produce those cheeses that were normally made in France or Switzerland. Now they produce them directly in Russia.

Meaning that if you want Swiss cheese in Russia, you can find it. It doesn't need to be imported—they can produce it locally. And I assume the same thing has developed in Iran. Again, I'm not an expert on agriculture and all that, so I'm not sure exactly what Iran has done in this area, but you can see it at the technological level. We see that clearly when the US and Israel, who claim to have technological supremacy, actually don't. Today, Iranian technology is quite advanced—and of course, Iran is a highly educated country, with many universities and highly educated people. It's probably not a coincidence that since the beginning of this war, in just one month, something like 763 schools were destroyed by the Americans in Iran.

So it means that the Americans and the Israelis have especially targeted these—no, it wasn't schools, sorry, it was universities, yeah. You had universities, but you also had medical facilities and all that. And probably I'm mixing the two. In any case, you have a very large number of these institutions that were targeted by the Americans, because the strength of Iran is its ability to produce engineers—engineers who can overcome the issue of being under sanctions, because then you produce your own products. That's very true at the technological level, and that's very true at the military level.

That's probably very true in many technologies, where even China can be of some help, because that plays a role too. So, thinking that you can just strangle a country like Iran simply by blocking the Strait of Hormuz—I think that's a rather childish reaction. It would affect the allies of the US more than its enemies. As a result, it would weaken the US strategically. That's why I'm saying the US will probably not be weakened physically. Its weapons might be depleted and all that, but it won't be weakened physically—it will be weakened strategically, because it has lost its credibility, its ability to provide answers to problems.

And we see that we have also—and you mentioned that at the very beginning—that when we have a negotiation and we look at the teams involved, we see that when you basically have real estate agents discussing with seasoned diplomats, with people who are much more experienced in negotiation than those on the Iranian side, there's no balance here. It's no surprise—the others will be better. You can't, it's not a matter of opinion, you just can't do that with amateurs. And here in the U.S.—and it's interesting, by the way—that you have only the same couple, the Witkopf-Kushner couple, for everything. They talk about Palestine, they talk about Ukraine, they talk about everything. So, you know, these men are all-rounders; they can do everything. The problem is, when you do everything, you do nothing.

And that's exactly what we have here. It shows how amateurish this whole U.S.–Iran adventure is, and it also raises questions about the quality of the leadership. That's part of the credibility issue too. How can you trust a country that makes such silly decisions? If you have an ally, you want one that's reliable—an ally that can make good decisions and get the job done without causing more damage. Here we have the opposite. The United States creates a problem, and then the solution ends up being even worse than the original problem. So we're in a kind of vicious circle, and that's

not good for the credibility of the United States. In my view, it has already lost that at the strategic level.

#Nima

Thank you, Carl. Thanks so much.

#Jacques

Thank you very much, and see you soon, Carl.