

John Helmer: Blood, Money, and the TRUMP DYNASTY - Iran Shows How to FIGHT

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#Nima

Hi, everybody. Today is Tuesday, April 14th, 2026, and our dear friend, our brother John Helmer, is here with us. Welcome back, John.

#John

Thanks for having me back.

#Nima

There's a lot to talk about, John, but let's start with the latest one — the U.S. blockade on Iran, on Iranian ports. So far, what we've seen from China is that yesterday the Ministry of Defense said they don't care about the blockade. Their tanker is going to pass through the Strait of Hormuz because they see Iran as being in charge of the Strait right now, and Iran is allowing them to go through. The other point is that today we learned a Chinese tanker — which was under U.S. sanctions, by the way — passed through the Strait of Hormuz. How do you see the situation with the blockade?

#John

Two ways. First of all, in military terms, what the U.S. side walked away from in Islamabad was the attempt to say, "We've put our terms on the table — take it or leave it." We'll come back to the ambiguities and the domestic politics, and to what Vance has done that's distinct from the others around Trump. But Trump is trying to emphasize that the U.S. has escalation control, and that by imposing a U.S. blockade on the Strait of Hormuz — after the U.S. had proposed in the negotiations to share the Hormuz toll with Iran — that's another element of what the Americans tried to do in Islamabad.

The Iranians said, "We're not going to share the Hormuz toll with you," and we'll come back to that. That was a bribe Trump was trying to create. We'll come back to it in a minute. Putting the blockade announcement out is an attempt to say the U.S. now controls the Hormuz Strait. But they failed to

show that when they sent the two destroyers in as the negotiations started. That attempt boomeranged — the destroyers had to turn around and back out. Now, as you say, two Shadow Fleet tankers have come out of the Strait of Hormuz — one from Sharjah and one from, let me see, where the other one came from... one came from Bushehr, one from Sharjah.

So... I wasn't aware of the Chinese Defense Ministry statement. That's a positive sign that China will not allow the U.S. to intercept and will defy the blockade. President Xi Jinping just told the Spanish prime minister that the world is now facing a contest between justice and power — that the way a country treats international law is its vision of order, values, and responsibility. Principled nations uphold justice and are willing to stand on the right side of history. So the Chinese are beginning to say, more explicitly than before, that they will not allow the U.S. to dictate the blockade.

If the blockade fails, however, as an attempt by part of the Trump administration, the question then becomes: do they escalate to some of the much more aggressive measures that were anticipated before they went into the negotiations? That includes an attack on Karg Island — destroying Iran's capability to load oil from Karg Island. We can come back to those provisions too. So the ball is bouncing back into Trump's court to see if the U.S. wants to escalate now in order to demonstrate it has escalation control and to take that initiative away from Iran. Iran, for the time being, retains the initiative. Let's see what happens next.

#Nima

John, what's your take on what happened in Islamabad during the first round of negotiations? Because just yesterday or today we heard there might be another round on Thursday in Islamabad. I'm not sure if that's accurate, but at least there are these rumors about a second round of direct negotiations with the United States. What actually happened during the first round?

#John

I see what happened a little differently from some of my colleagues on this podcast. And I'd ask our audience to understand that it also has to be interpreted in terms of U.S. politics. What are U.S. politics right now? Why was Vance there? Why did he walk away? Why did he make—he said it himself, not just the Iranian side reporting it—Vance made a number of telephone calls, including, as the Iranian side has said, one to the Israeli Prime Minister, Netanyahu. What does that mean? Mohammed Marandi has said, in a very interesting podcast, that the Iranian side interpreted that as a failure of the U.S. side to demonstrate it had a clear negotiating mandate. It lacked authority. It interpreted what?

Vance's telephone calls amounted to a kind of weakness. That's an understandable interpretation from a negotiating point of view at the table. But from a U.S. political point of view—looking ahead to the midterm elections in six months, and to the question of Trump's succession—Vance was playing U.S. politics. And what does that mean? What did he do? He showed, first, that he was not

disloyal to the, quote, "Trump team." Second, he was showing that if the negotiations blow up—if Trump and his other advisers, the Jewish ones (and I'll come to what I mean by "Jewish" in a minute), particularly Ditkoff and Kushner—if they escalate now militarily, there's a whole list of what they plan to do.

It was published in the Washington Post the day before the Islamabad negotiations began. If there's escalation, if there's continued disruption of oil and commodity markets, Vance is saying, "I'm not responsible—they are." Now, where is Vance politically? Answer: Vance is the front-runner by four. I'm looking at the current polls. On average, Vance is now at 44% as the preferred candidate. Donald Trump Jr.—and this is the important one—is running next at an average of 15%. The Harvard-Harris poll shows him at 20%, Vance at 42%. Just remember what this means. It means that Trump, having the ambition to run again—which is constitutionally impossible or at least very difficult—can only trust his family.

That's what this means. The likelihood, in my opinion, given the shape U.S. politics are taking—especially if the Republicans lose control of Congress in the midterms—is that Trump will not feel safe. His fortune will not feel safe. He will face impeachment and criminal charges. The entire Trump system that he's built—the multibillion-dollar system that involves Ditkoff, Kushner, and the others—will face jail, courts, jail. The only way Trump thinks he can continue is a dynastic one. Dynastic. That means either Donald Trump Jr. or Eric Trump will be the candidate. And Trump thinks that if he throws his support to his son or sons, he can wipe out that margin that Vance has. Now, Vance knows this.

They advanced with a number of others who are either Roman Catholic or Episcopalian—in the case of Susan Wild, the chief of staff. These are the Christians. They're now facing a situation in the United States that's unprecedented. And Trump showed where he thinks he's heading with that attack on Pope Leo XIV, with the tweet picture showing Trump as Jesus Christ healing the wounded, and so forth. This is Trump doing something no president of the United States has ever done before—attacking 70 million Catholic believers. Seventy million of them. There are 70 million Catholics in the United States. There are 7 million Jews.

And the Jewish population is more than half Democrat—more than half. The Jewish support around Trump, which is Israeli in base, is pushing him to escalate against Iran in a way that has brought the Catholics, the Pope, and the Catholic-believing community of the United States to threaten Trump. Vance has a chance of capturing that vote, but only if he dissembles—only if he portrays himself as not to blame for what Trump's about to do. So I think one has to see the Americans behaving in domestic political terms. In Islamabad, we can now get to the questions of what happens next.

And I agree with you that there were even indications from Vance that he was hoping for another round—therefore, more negotiations. From the point of view of Vance's political future, from the Trump administration's point of view, and from public opinion and voter sentiment, keeping the negotiations going is good. It's positive politically; it calms the oil price markets. You can see the

markets already lowering the oil price. The blockade is one of the obstacles to de-escalation, to calming everybody down. Having a new round of negotiations improves the calm. It's better for the world, better for the oil price, better politically for Vance.

On the other hand, Netanyahu and the Israelis—and the Jewish supporters they have in the White House, led by Stephen Miller, Deputy Chief of Staff Vitkoff, and Kushner, among others—want a full-scale war against Iran. They basically want to bomb Iran into the Stone Age. There are five or six provisions in the Washington Post editorial: no nuclear power at all in Iran, decapitation of leadership, complete demilitarization, no missile systems, and no oil. These were the provisions in that editorial piece. They were acknowledged by the Iranian side, as I understand it, as a significant warning of escalation. That's the, let's call it, the Vitkoff–Miller–Kushner line.

And I see the blockade of the Hormuz as a holding action, a temporary measure. They see it that way too. They want to escalate to Trump's previous threats—the fight against the Pope is unprecedented. It's already brought Meloni, the Italian prime minister, down; against Trump for the first time. Not yet in France, unclear in Ireland. I'm going through the Catholic countries. What's happening in the United States within the Catholic community is completely unprecedented. And therefore, we have to see, if you like, what the future will be—the Jews of the United States versus the Christians. This is on the level of civilization, of political civilization, in the United States. And Trump has triggered this.

#Nima

Yeah. Does he know what he's doing, John? Is he doing this intentionally, deliberately, or is he just making noise in this kind of chaos without knowing the consequences of what he's doing?

#John

I understand a lot of our colleagues on your program want to say that Trump has gone mad. Psychopaths aren't mad. And you're asking the question, is he out of control? One of the things I invite everybody to do is go to RollCall.com and look at the presidential calendar—look at the White House meetings. What's happening is that Trump is spending more and more time in what's called, in the calendar, "executive time," or a "policy meeting." Executive time probably means he's upstairs in the residential quarters of the White House with those very close to him. They're family members—almost certainly one or two of the sons—and almost certainly Miller, Stephen Miller. But nobody knows; it's not being leaked yet who they are.

When that happens, if you match it to the timing of the tweets—these bursts of tweets that come from Trump during the night—the spelling mistakes are a giveaway, and so is the repetitiveness. What's happening is that at night, in the presidential residence, Trump is surrounded by friends who

talk him up, and he gets violent. He is, naturally and psychopathically, a violent individual. He's persuaded that this line, which tends to come in the late hours of the night—if the tweet postings are correct, with the spellings that show he did them—is when he's not by himself.

He's with others. And I would have to say it's a mistake to treat Trump as mad. He is both controlling the others, and they are feeding his violence—his interpersonal violence. We know about his sexual violence. We know a lot about the violence he shared with his father, from Mary Trump's book, about the way they grew up and the way he bullies others, especially his late brother. So I don't think Trump is mad. I don't think he doesn't know what he's doing. I do think he's impulsive, and he's encouraged by some advisors who have so far remained anonymous. And that's why he produced that picture of himself as Jesus Christ.

And that's why, to answer your question, he didn't anticipate how profoundly hostile that other reaction has been in the United States among the believers for whom that picture was blasphemous. Second, he didn't anticipate how much political and polling damage it caused him the next day, when Tony Fabrizio, a Catholic and his principal pollster, told him how much harm it was doing. Then they pulled the picture. But he's doubled down against the Pope. So he knows what he's doing. He thinks that what he's doing is what the electorate wants. It's a show of his power.

I mean, we can get into psychopathic fantasies. We can get into the cartoon world where they're expressed. But he's not mad—he's a psychopath. He loses control and then corrects his mistakes to the extent that others around him advise him. And that's what he did with the picture. But he didn't withdraw the motive. Now, in Italy, his closest supporter in Europe is Giorgia Meloni, the prime minister of Italy. And she's faced a storm of criticism for not criticizing Trump. They're not defending the papacy or the Vatican, but in that country, in Italy, people are making the point—senior political figures are making the point.

Not even Hitler or Mussolini said this about the Pope—and that Pope, Pius, has been accused of significant collaboration in the Holocaust against the Jewish people. So I think the short and the long answer is: he's not mad, he's a psychopath. Second, the people around him are advising him essentially on the maximum Israeli military plan. The doctrine of the Israelis and the Jewish advisors around him is the Chabad doctrine. We don't need to get into it, but I need to make this point: Chabad, as a Jewish theological doctrine, is much older than Zionism—much older.

As a religious doctrine, it advocates the racial, tribal, and ideological superiority of the Jewish people and their laws as superior to everyone else's. Trump reflects this view personally. He's not a Chabadnik—no, he's not. There are close advisers like Joshua Grunbaum who are, and Kushner, who is, but not Trump. What's common between them is the notion of racial superiority, intellectual superiority—the superiority of my law, my people, over all others. That's a Chabad doctrine. It's older than Zionism. It's a Jewish doctrine that many Jews find repugnant. I'm not saying that, but I am saying there is religious fervor in Trump or in his advisers—religious fervor that's more than Zionist.

#Nima

Yeah, definitely, he sees himself as the center of the universe. That's why even with the Pope—Leo—he says, "He was chosen because of me." Yes. This is beyond, you know, it's some sort of delusional thinking, John, that I don't... Because, on the other hand, we're talking about a man who's the president of the United States. This is important. You know, if he were some little guy in New York doing his business, it wouldn't matter to anybody in the world. But he's the president of the United States, and he sees himself as the only person that matters. It doesn't matter whether it's China, Russia, the Middle East—everywhere. I think that's right.

#John

It's happened before. Napoleon clashed with—I believe it was Pope Boniface, though I can't recall exactly which Pope it was at the time. It might have been a Pius, it might have been a Boniface. Pardon me, I'm not remembering. But between about 1801 and 1809, Napoleon was at serious odds with the papacy and, in fact, kidnapped the Pope and imprisoned him until he agreed to what's called the Concordat in France. Their fight was political and constitutional—it had to do with whether France, under Napoleon's proposed new constitution, would be secular and whether the Church would be subordinate.

This time you put it right, Nima. It's Trump who thinks he's the monarch. Remember the French monarch who said, "L'état, c'est moi"—the state is me. It's me, it's me. And that's what he keeps repeating. He has, almost in historical terms, a monarchical view. And he's going to succeed himself with a dynasty—his son. So there are historical parallels, yes. But Iran is... let's not focus too much on Trump. Iran has found a way to fight back at this, and that's very important. But it's also very important that the Iranian side understand what the Americans are doing must be interpreted as political—domestic political—it translates into votes.

#Nima

Yeah. John, just getting back to the war against Iran and the ceasefire—as you've mentioned, it's on both sides. Iran is holding the Strait of Hormuz. The United States—everybody was talking about it because of the Strait of Hormuz—the leverage Iran has, some sort of leverage over the United States and Israel when it comes to negotiations and talks. But it seems that Donald Trump has decided, with this blockade, he's going to balance it, at least when it comes to the rhetoric of negotiations. And he's trying to do that. I don't know how successful that will be in improving his position in the negotiations.

#John

Well, you started by pointing out that two tankers have already come through and weren't inspected. There are about 120 transits on a normal day through the Strait of Hormuz. There's no

way the United States Navy has the capability to stop and search them all. It doesn't have to—it just has to pick one tanker, confiscate it, arrest the master, and seize the oil to deter all trade. But that contradicts the attempt to stabilize the oil market and reduce the oil price. And some of the new supply and logistics shortages—the shortage of jet fuel, for example, and the shortage of diesel—are becoming very serious for the airlines.

I think you're right that the blockade will be seen as another one of Trump's weaknesses—a failed escalation move. If China opposes it and the U.S. markets oppose it, and we go into a second round of negotiations, we could expect that. The way Trump backs off, he'll say, "Well, I'm going to suspend the blockade until we have a second round of negotiations." He's done that before; he can do it again. That was the formula for the ceasefire. The problem is that the Israelis don't want a stalemate with protracted negotiations. Protracted negotiations preserve Iran's escalation control, do they not? That's what negotiations will mean if they're drawn out.

So the U.S. advance has already, as it were, exercised the walkout option. You know, it was a take-it-or-leave-it on Sunday—or Saturday, depending on which time zone you're in. It was take it or leave it, our clear and final proposal. I hope they'll reconsider. Well, another round of negotiations means the proposal wasn't clear and final. So I agree with you that the blockade was a foolish move if it can be broken so easily, and if China, which will host Trump in exactly one month in Beijing, is prepared to say, "Enough's enough with the Americans." The Chinese move—we can come back later to what the Russians are doing, which is basically reinforcing Iran's capability to fight back. And that's what Russia is doing now.

For China, both Xi's statements to the Spaniards, the defense ministry statement you mentioned, and the tanker freedom won't necessarily preserve China's access to oil. They won't encourage the rest of the world's commercial tanker fleet to go in and run the risk of the gauntlet. So the number of disadvantages for Trump and the Americans now far outweighs the benefits. In this respect, it was a foolish ploy, and it failed to do what Trump thought it would do. And Vance is in the clear—he walked away. He called these guys and can now say, "This was their plan. I walked away, and we have a second round. Let's see what happens in the second round." Then we can see what Mohamed Morandi described as progress at the expert level.

Well, what's that mean? It almost certainly means that the governor of the Iranian Central Bank—Mr., I believe, Hemmati was his name. Hemmati. Thank you. That's a very high-level financial official, not matched by anybody on the U.S. side. Let's see if Scott Besant goes next time, because that would indicate that some solutions to the sanctions issues are close to agreement. Remember, the Iranian side said that one of their preconditions was the release of the six billion dollars' worth of Iranian cash from oil sales to South Korea that's locked up by Trump, then Biden, and by Trump again in Qatari banks. And that was a precondition for starting the negotiations. Well, it didn't turn out to be a precondition.

#Nima

It's seven billion dollars, John. Seven billion.

#John

Thank you for correcting me. The Iranian side said the Americans have agreed. The American side told Reuters they didn't agree. But there we are. I think we're seeing progress on the sanctions issue, and sanctions are the easiest thing to agree on because Trump can stop sanctions enforcement by executive order. He doesn't have to go to Congress. He doesn't face the Jewish hostility inside the Democratic Party in Congress, which might block that. So sanctions—well, that agreement's getting closer. Are we any closer on the issue of nuclear enrichment? Possibly, but not on the terms the Americans have laid on the table, and not the so-called surprise ones. So a second round would focus—if one wanted to show progress—it would focus on the issues where progress has already been made.

#Nima

John, I think in the case of the Strait of Hormuz, Iran is not going to share anything with the United States—they already know that. But when it comes to uranium enrichment, there's a lot to be discussed about enrichment on Iranian soil, because it's a technical kind of negotiation. It's not about political figures going there and talking to each other. They may define the framework, but it's going to be a huge technical task for both sides. So, after all, how do you see the case of Iran's nuclear program?

#John

Let me go back to the straightforward point, and then I'll come back to the nuclear one. The nuclear one is a substantive issue, and we'll return to that. In my view, to the extent that the U.S. side has proposed to share or take a share of the Hormuz toll, that's Trump's idea of taking a bribe. It has its parallels. The "Board of Peace" framework for Gaza is essentially a shakedown—an extortion of \$1 billion per Arab state signing on to the Board of Peace for regulating the future of Gaza. Trump has devised similar schemes with Russia, through Kirill Dmitriev's proposal for unfreezing the \$300 billion in Russian assets and turning them into a joint U.S.–Russian development fund.

What is that? What would a joint U.S.–Iranian Hormuz Toll company be? It would be a system for giving bribes to the Americans—for Trump to have his people, Kushner and their relatives and business partners, sit on a board. They would all share in \$2 million per vessel per day. It's a huge, multibillion-dollar scheme. We did the calculation last week: at least, if you don't share it with Oman, it's \$40–50 billion a year. Now, that's a bribe. Why won't Iran pay a bribe? Why won't Iran agree to the consortium proposed? Answer: Iran? Because Trump has killed—murdered, assassinated—Iranians. And as a friend of mine points out, there are no pockets in shrouds.

You can't keep a bribe if you're dead. If the person who paid the bribe has killed your brother or your officer—if the American and Israeli assassination programs have done that—it makes it impossible. Trump doesn't understand this. He thinks he can get the Iranians to pay bribes. The Arabs pay bribes—yes, the Saudis pay bribes, the Emiratis pay bribes—and Trump has boasted about them. But the Hormuz issue remains, and the settlement remains: no bribe for Trump, which would infuriate him. Now, to go back to the nuclear issues—yes, it's a highly technical area, but it's capable of a variety of solutions.

The Russian side—and they repeated this when President Putin had a telephone call with President Raisi on the 13th, which was, I think, Monday—said that Foreign Minister Lavrov had spoken with Foreign Minister Amir-Abdollahian. Each time there's a discussion, when the Russian side talks about humanitarian aid and assistance, they're also referring to military resupply and to breaking any kind of food siege against Iran through the Caspian Sea and the land routes. The Russian side has said it might be willing, or available, to take a particular stock of highly enriched uranium and store it. That would not be under IAEA control.

It would be a joint Iranian-Russian solution. Whether the Americans would agree is another matter. On the level of enrichment, there are many others who are more capable than I am, who know the history of this negotiation, to say whether the Americans would come back to the 3.67% and essentially the older JCPOA formula—which is where we're headed. But just remember this: this is what I'm reading out. The Washington Post piece said that just the day before the Islamabad negotiations began, the third point was to secure Iran's enriched uranium by establishing a virtual perimeter around it. Declare any sites harboring what Trump calls "nuclear dust"—that's Trump's phrase—to be no-go zones for the Iranian regime.

A "circle of death" that would be monitored 24/7—enforcing the perimeter by killing any Iranian who entered that circle. Now, that appeared in the Washington Post. What does that mean? It essentially means U.S. military occupation of parts of Iran—parts of Iran's manufacturing, industrial, technological, and scientific capability. Military occupation. That's what the Israelis want. It would represent the next step after the failure of the Isfahan operation and the failure of last June's bombing operation at Natanz and Isfahan. That's the maximum form of U.S. military occupation of parts of Iran—the maximum they're after in terms of controlling Iran's nuclear future.

So between that and a Russian plan for storing highly enriched uranium, and a general agreement to drop this ban on even civilian nuclear power, there's plenty of room for expert terms. There's plenty of room for compromise. There's plenty of room for experts to come up with a formula. And the Americans would come up with a formula that's the JCPOA formula, more or less, with some embellishments for public confidence-building and verification measures. So it can be done—but not with a maximum aim like the one I just described. That's de facto military occupation of a conquered country. It's to do to Iran what the Allies thought they were doing to Germany, and what the Allies thought they were doing to Japan.

#Nima

I think by now they know it's not going to be possible for Donald Trump or anyone in the United States. And John, when it comes to the GCC countries, yesterday there was a phone call between the foreign minister of Iran and his counterpart in Saudi Arabia.

#John

Mm-hmm.

#Nima

Later on, Saudi Arabia announced that it was against the U.S. blockade on Iran. In my opinion, that came after a call from Arakji, the foreign minister, who called Saudi Arabia. When we talk about the content of that negotiation, it may be that Iran was warning Saudi Arabia about the consequences of the blockade. How do you see the situation? We had a closer approach between Iran and Saudi Arabia before all this madness and this war. How do you see today's relationship—or some sort of understanding or interaction—between the two countries?

#John

Well, I'm here as the Moscow correspondent, remember, so I'm not the Saudi correspondent. You know very well that each Arab country has its own particularities. The general points we can make have been made before. They're very nervous now. The Iranian side has demonstrated it can punch holes through the U.S.-based protection that established regime security for Bahrain, Kuwait, Saudi Arabia, and so on. As I understand it—and you can fill me in if I'm mistaken—I believe there is an Iranian fatwa calling on the faithful in those countries to protect Iran's Islam from the behavior of the family regimes that run them. So they're increasingly nervous.

Saudi Arabia invited Pakistan to send in troops, we remember, at the beginning of the war to increase the level of security that the Saudi families—the ruling Saud families—represent. So the loss of U.S. protection through the bases is a very important part of the nervousness of each of these regimes. And the Iranian side has a condition that the U.S. bases in the Arab world will not be replanted, replenished, reconstructed, and so on. So the Arab kingdoms, the sheikhdoms, have to come to a new *modus vivendi* with Iran. I'm speaking in generalities; I'm not speaking of the particular politics of each of these states. They... they obviously are against a blockade because it threatens them.

We already know that, technically, if I'm not mistaken, the Yanbu pipeline has been attacked at least once or twice by Iranian drones, and that the Yanbu port itself is within range of both the Houthis—whose capacities haven't really come into this war yet—and Iranian capabilities. So the Saudi diversion to the Red Sea is only a fraction of the significance of the Strait of Hormuz. From my

experience of Saudi politics, the Saudis will be as duplicitous as possible. They'll try to protect the regime with Pakistani mercenary forces. They'll try to push the U.S. to do as much damage to Iran as possible. They'll encourage Iran to negotiate some modus vivendi, and they'll play every option. That's the behavior of weak sheikhdoms that face more threats to their own, let's say, insecurity than they've ever faced before.

#Nima

John, we had the visit of the UAE delegations, then we had—to China, I'm talking about. Yes. What are they seeking in China? What can we expect from China in terms of how it views the GCC countries?

#John

Wouldn't it be better if I said I don't know? I don't know. Arab politics, Chinese politics—they're highly technical. I mean, I can't say I know what I can... If you'd like, I'll give you my guesses. They need to play the Chinese mediation role in the same way the Saudis are playing the Pakistani mediation role. They want to make some form of accommodation to protect their future, which Iran has damaged in a way that no Arab threat to these GCC regimes ever did. Saddam Hussein was the principal threat in the past, and he's dead and defeated. But Saddam was never the threat that Iran is, because Saddam couldn't generate the kind of internal opposition in these Arab states that Iran is capable of. So I assume—it's my guess, let's put it modestly—it's my guess that this was an attempt to get China to modify Iran's position so that some accommodation can be found. But it's too late.

#Nima

John, you mentioned the level of, you know, the way Iran is capable of manipulating the internal affairs of these countries. But do you really think Iran is doing this? Or is it the reality of the region that's shaping public opinion in these countries? Because people have been witnessing what's happened in Gaza, in Palestine, and in the case of Lebanon. And this isn't something Iran could really influence, in my opinion. People are seeing what's happening and the incompetence of the leadership in their own countries.

#John

It's that. There's no question about it. You can measure the degree of dissent in Saudi Arabia, for example, by correlating it with the level of repression that MBS has imposed on the country—at all levels, in all social classes. The repression in Saudi Arabia is so severe that when I try to speak to my old Saudi sources, nobody will talk on the phone anymore. So the level of repression is a measure of how internally divided those countries are for domestic reasons, and those domestic reasons then spill out in symbolic politics—the particular way in which the Saudis, the Emiratis, and the Qataris have associated themselves with Israel and with the expansion of Israel, including the genocide of

the Palestinians. So I agree with you, but let's not be naive. Iran has achieved, through its military strike capability, the destruction of Arab sheikh confidence in the U.S. protectorate.

The U.S. protectorate began, let's say, in 1945. So we're talking about almost 75 years of the U.S. protectorate. And those protectorates involve a whole variety of arrangements. The Iranian counterattack has destroyed the credibility of that. And once that happens, the system becomes less credible. Public dissent regarding the gross, grotesque inequalities of the sheikhdoms, and all the other issues involving the violation of Arab solidarity—the participation and collaboration in Israel's expansion—all of that bubbles to the surface. But the underlying inequalities, those are things that can't be resolved by repression. They also can't be directed externally by Iran. But Iran can play a significant role, and it can play the role of neutralizing U.S. protection and Israeli bribery, and so on and so on.

#Nima

Yeah. John, here's what Donald Trump said about Spain. He said, "We will cut all trade ties with Spain because they didn't support me against Iran." And 36 hours later, we had Xi Jinping talking about Spain, saying Spain is standing on the right side of history, that it's a very reasonable country, and that China stands with Spain. "We will work toward world peace and oppose the law of the jungle," as you've mentioned before. Yes, yes. Is China winning when it comes to Europe? Is Europe somehow finding itself? Because the war in the Middle East has brought up something so important, in my opinion—something we haven't seen before with the conflict in Ukraine, with the war in Ukraine. This sort of difference between the two parties.

One party says there's no viable choice to start a new war in the Middle East because they've been suffering from these endless wars—in the Middle East, Iraq, Afghanistan—which were the main sources of the problems they're facing right now in Europe. Economically, militarily, everything they have now, the problems of the Middle East would move to Europe. They don't go to the United States. That's the problem Europe understands. On the other hand, Iran is a very different country when it comes to confrontation. They know the capabilities; they've learned about Iran's capabilities during this war, in this first round of the war in June 2025. So, how do you see Europe today?

#John

Well, I have to qualify that, Nima. I know Greece best—this comes from long residence and direct involvement in Greek politics. I know Portugal a little, France better, and England quite a bit. Each one is very different. Let's bear in mind that Spain remains committed to fighting Russia. I'd love to see the Spanish prime minister get on his horse, ride to Moscow, and have a parley with the Russian side, confessing Spain's mistakes in every respect—including the Rota base, which is the NATO launching point with nuclear weapons aimed at Russia. Why are the Spaniards realizing their profound strategic mistake with Iran and with China, but they haven't yet recognized their mistake about Russia?

Let's put it this way. I don't know Spain well enough to say how the Spanish prime minister is balancing his internal problems—making it look like he's doing his best to reduce the price of petrol, diesel, jet fuel, fertilizer, and everything else—while tourism is collapsing, because Spain depends on it and planes don't have enough jet fuel to get there. Spain is balancing and cutting without changing its underlying commitment to NATO—and that's a war against Russia. They haven't seen religion yet. In Greece, it's still a 105% commitment—this is the Mitsotakis government's commitment—to the war against Russia.

The Greek Church hasn't yet lined up against Trump's attack on the Pope. In every respect, the only serious and sustained opposition inside Greece to the war against Russia is coming from the Communist Party—the KKE—and its youth movements and factions. They're not necessarily pro-Putin or pro-Kremlin, but that's the only real opposition. Each country is different. I have to say, in France—a Catholic country—there's been no reaction yet among the French bishops to Trump's attack on the Pope. Trump's a hater; it provokes hatred and public condemnation in Europe, that's true. But it isn't translating into any change of line toward the war against Russia, the rearmament of NATO, or the 2% to 5% increase in NATO spending.

When that begins to happen, I'll be surprised. It's not happening now. Yes, Iran's proving a lot of things, but mainly because of the Strait of Hormuz card—the oil card. It's also able to show its strength in that respect because it's got Russian and Chinese assistance. You don't hear the Spanish prime minister congratulating President Xi for helping Iran defend against Israel, do you? What we've got is the Spanish prime minister with his hand out for Chinese investment and assistance, trying to reduce the cost of fuel and everything else the Spanish economy needs, without changing policy toward Russia.

I'm not convinced there's some profound change happening in Europe. What's more likely is that Spain and a few other European countries will be less supportive of Israel now. That's another outcome of the Iranian fightback—a result, as it should be, of Israeli genocide. So when Trump threatens genocide again, or when Israel threatens and carries out genocide in Lebanon, yes, the Spaniards suddenly get a burst of moral inspiration. But they don't have that same moral inspiration when it comes to NATO's rearmament against Russia. So, one kind of moral inspiration and one kind of immoral inspiration—what does that add up to? A fake inquisitorial achievement, in my opinion, for the Spaniards.

#Nima

Your point is important, because before coming on this live, we learned from Giorgia Meloni that Italy is suspending its defense agreement with Israel.

#John

Thank you for laughing. We'll see what that really means. The proof of that particular pudding is in the eating. But yes, I don't mean to laugh and say that's not important—it is. Let's see if that flash of common sense in Italy moves over to Greece. Greece is building its alliance with the Israelis. Israel is colonizing the island of Crete, once my home—colonizing it. Souda Bay is an Israeli–NATO–American operation. The Greek side has been expanding its alliance with Israel, and it was to have been the destination of the IMEC, the India–Middle East–Europe Corridor, which was supposed to be the brilliant strategic invention of Prime Minister Modi, the Saudis, the Greeks, and the Israelis. No, no, no—Meloni's inspiration and moral example aren't exactly spreading. I wish they were.

#Nima

Yeah. Before wrapping up, here's a question from one of our audience members. He's asking: has Russia taken steps to protect Russian ships in the Baltic Sea and the Danish Straits? Has Russia done anything?

#John

It's a good question, and thanks for asking it. The answer is a bit of yes and a bit of no. On the one hand, close to home, there's been the deployment of Russian Navy escorts to counter the use of civilian vessels in the Baltic as platforms for drone attacks against Russia. That's the first thing. Second, the Russian side has used the Navy, and to a limited extent the Air Force, to deter Estonia and some of the Baltic adventurism—to the degree that Estonia has now decided it will not pursue threats against Russian vessels.

The ambition that's been expressed by Nikolai Patrushev, who's the head of the Maritime Board, a member of the Security Council, and the former head of the KGB, is to expand Russian naval capabilities to protect Russian fleets as they move through the Danish Straits. The goal is to prevent the Danes, Swedes, Norwegians, Germans, and others from trying to choke off the Straits against Russia, much as the Americans are currently trying to choke the Strait of Hormuz against Iran. Patrushev has been making a number of speeches about what will happen in the future, but it hasn't happened yet.

The Russian capability to join the SOFCOM fleet—the Russian tanker fleet for gas and oil—with extended naval protection hasn't reached the Mediterranean yet. There have been serious attacks on merchant vessels carrying heavy construction equipment to Korea and the Far East; one of those was sunk about a year ago. Ukrainian attacks from the Libyan coast, possibly from British, Greek, and NATO bases in southern Crete, have targeted tankers moving to or from Russia. That hasn't stopped. The Ukrainians' ability to attack Russian gas transport in the Mediterranean has not yet been deterred by Russian escorts. So, half the answer is yes.

The Russian side is moving its limited naval resources relatively close in, so that's Baltic protection. The deterrence weakens the farther away you get from the Russian first line. And the Mediterranean right now is dominated by Libya as a firing platform for the Ukrainians and their British and American helpers—the NATO threats to Russian operations—and the collapse of the Russian fleet capability out of Ukraine. Tartus in Syria hasn't been matched by a reconstruction of Tobruk, which was supposed to be a Libyan port the Russians could use. In short, Russia, through Patrushev and others, is promising what it hasn't delivered yet. Will it? Don't know.

#Nima

Yeah. Any escalation? Some sort of escalation between Estonia and Russia—do you see that happening?

#John

Well, right now the escalation is on the Ukrainian side. The Ukrainians are escalating their attacks on Russian energy infrastructure. They need to project the notion that they can not only continue fighting, but also project the NATO idea—and it's a NATO idea and an American idea, too—that Russia is vulnerable so long as the war continues. The Ukrainians are escalating in those respects. They're also more capable than—well, less capable than the Western press says, but more capable than the Russian press admits—at maintaining defenses on the Ukrainian battlefield. So, I wouldn't describe it as escalation.

I'd regard it as Ukrainian resistance continuing to be strong, and the NATO commitment to war against Russia, as we've said, remaining strong. On the other hand, for the time being, because of the Middle East war, the world needs Russian oil— as much Russian oil as Russia can increase in production and move through the seas without interference. So this is a temporary situation. Russia can't supply the deficit of Saudi, Kuwaiti, and Iraqi oil, but it can increase production, it will increase revenues, and the so-called black fleet—shadow fleet, alternative fleet, sanctions fleet—will continue to benefit from this temporary situation.

But if Iran can prove by force that it can push its fleet through sanctioned waters, then Russia has to learn that lesson too. So, can Russia learn to fight the Americans the way the Iranians can? Can Russia learn not to bribe the Americans, not to count on bribing the Trump Party? Like the Iranians, there are all sorts of lessons that Iran is conveying now—quietly, discreetly—to Moscow. And we can come back to that another time. To some extent, I'm trying to report it so that folks can read in **Dances with Bears** what some of the implications are.

#Nima

Here's the breaking news, John.

#John

Two Iranian vessels are crossing the Strait of Hormuz despite Trump's blockade. Well, yes—so it's not much of a blockade. But we have to point out that they've got to move out of range of IRGC support from the shore. Once they're out of range, we'll see if the U.S. attacks them or tries to stop them. Does the report you're looking at indicate what their destination is?

#Nima

No, they didn't mention the destination, but we just got a report saying that two Iranian vessels are crossing the Strait of Hormuz.

#John

Let's be a little patient until the Iranian protection of those vessels ends, once they're beyond that range. At that point, the U.S. will assert—or may assert—it's false. Let's see. The decision will depend on who owns the oil, who's buying the oil, whether it's headed for China or for India. I doubt the Indians—who, after all, under the Modi administration, have committed to fighting Iran and are now rueing the consequences of Modi's colossal strategic mistake. But I'd say the safety of those vessels will be determined by who owns the cargo. What's the destination? If it's China, they won't be interfered with. Yeah.

#Nima

Thank you, John. Thanks so much for being with us today.

#John

Thank you, Nima. We've got some breaking news, which is always fresh for everyone listening in. I hope we can keep seeing the unpredictability of Trump alongside the more predictable patterns of old-fashioned U.S. politics, with the elections just six months away.

#Nima

And let's mention that the unpredictability is not good. It's really not good.

#John

It's not good. No, it's not good. A war between Christians and Jews in the United States isn't good either. It's never happened before—but that's what Trump has now provoked.

#Nima

Thank you, John.

#John

See you soon. See you next week.