

John Helmer: Iran's Unthinkable Move, The Middle East's New Reality

Follow me: Substack: [https://substack.com/@dialogueworks?](https://substack.com/@dialogueworks?utm_campaign=profile&utm_medium=profile-page)

utm_campaign=profile&utm_medium=profile-page X (Twitter): https://x.com/Dialogue_NRA

Patreon: [https://patreon.com/Dialogueworks?](https://patreon.com/Dialogueworks?utm_medium=unknown&utm_source=join_link&utm_campaign=creatorshare_creator&utm_content=)

utm_medium=unknown&utm_source=join_link&utm_campaign=creatorshare_creator&utm_content=

#Nima

Hi, everybody. Today is Tuesday, April 21st, 2026, and our dear friend, our brother John Helmer, is here with us. Welcome back, John.

#Guest

Thanks for having me back, Nima.

#Nima

John, let's start with one of the significant events just two days ago. We had an Iranian commercial vessel taken under the control of the United States, which caused some turmoil within the Iranian media. They said, why is that? And why are we not responding to what the U.S. is doing? Because they're there, particularly in that region, because of the ceasefire. If there is no ceasefire, they're not going to be able to do that so close to the Persian Gulf. Yes. And your understanding of what has happened with that case?

#Guest

It's a very interesting case, Nima. I've spent quite a lot of time in the last few hours researching it in the maritime media and elsewhere. Here's what I believe happened. First of all, yes, there was an interception, but it took six hours. The CENTCOM press release indicated that the vessel *Tucasa*, a container or box ship, was first contacted—the first interception warning occurred six hours before the boarding took place. Also, that the vessel was moving at 17 knots. That means that over six hours, it moved in whatever direction it was going, but let's say roughly westward, by more than 100 kilometers. Now, let's be clear about it. Yes, it was an Iranian-owned vessel, but the cargo was Chinese-owned.

The vessel picked up the containers from Zhoushan—pardon me if I don't pronounce the Chinese names correctly—on March 29th. That port has been identified in some of the poisonous anti-Iranian

media as a chemical storage port. It's been alleged that that's the port from which the chemical components for rocket fuel that were supplied to Iran previously went to Bandar Abbas port. That's where that stuff is loaded. There's no evidence that anyone knows what was in the boxes, in the containers. But there's no doubt it was a Chinese cargo, and that hasn't been emphasized sufficiently because the Chinese state was asked explicitly yesterday to comment, and they didn't comment on that aspect.

The vessel then moved on March 29 down to Malaya, or Malaysia, either took on cargo or delivered cargo, and then moved from Malaysia westward. Now, the question then becomes where it was headed when it was first warned and what happened over the six hours. Because six hours is a long time, and it's inconceivable—I think you'd agree—inconceivable that the master of the Tucasa did not notify the Shah, Iranian authorities, that it was under potential attack from the Americans. They chased it for six hours. Then the question becomes, where was it headed? The anti-Iranian media say it was headed to Bandar Abbas, which is just inside the Strait of Hormuz.

The blockade would then have been blocking it from going there, but I don't believe it was. When the interception and boarding took place, remember it was the U.S. destroyer Spruance that fired the shots that didn't hit it. Then U.S. Marines from, I believe, the vessel USS Tripoli boarded the vessel 65 kilometers off Chabahar, which is in the Gulf of Oman. So what we've got here is an example—not exactly, not even geographically precisely—of the blockade of the Strait of Hormuz. What we're seeing was an attempt by force to stop an Iranian ship starting in the Arabian Sea, in the Indian Ocean. It then moved into the Gulf of Oman and was headed for Chabahar. Chabahar is, let's say, the easternmost port of Iran on the Arabian Sea.

Far, far more than 500 kilometers to the east of Bandar Abbas. Now, why are these details important? First, it's a Chinese cargo, so it's not only involved—the attack was not only against Iran, Iran's vessel, but against China. Second, it was an attack in the open waters of the Indian Ocean, not at the strait. It violates the ceasefire without a doubt. But over six hours, how is it possible that the Iranian shore support didn't dispatch surveillance drones or didn't detect what was happening by radar and by satellite—the Chinese satellite, Russian satellite, whatever the air defenses of Iran are involved here? Do we have a case of lack of coordination on the Iranian side? Do we have a case of U.S. indecision?

Because chasing a vessel for six hours, with a vessel moving at 17 knots, the destroyer could overtake it. Why was it so long? All of these questions are important because the issue then is, was the U.S.—if we could answer some of these particular unknowns—was the U.S. intending to use this vessel as a particular provocation to trigger Iranian retaliation? Iranian retaliation against the Spruance or against the Tripoli, had that retaliation taken an armed form, would then President Trump have declared the ceasefire over, blamed the Iranians, and started his “bombing back to the Stone Age” campaign, which many people, including our colleagues on your program, believe to be inevitable, okay?

So is the reason that for six hours the U.S. was indecisive, is the reason the Iranian side did not react as the Americans intended, part of the game that's being finalized, if you like, this week—the game of whether the ceasefire will continue, whether the negotiations in Islamabad will resume? So that's what happened. That's what we don't know about what happened. And that's finer detail to show us that each side doesn't really quite know what the other side will do. But in my assessment of this incident, the Iranian side has a better understanding of American predictability now, and the U.S. side has a much weaker understanding of Iranian predictability. Now, what happens when the more powerful gunslinger doesn't know what the powerfully defending cowboy—what happens?

Answer usually is, if it's not a John Wayne fiction, that the more powerful guy opens up anyway, shoots, and asks questions later. But the Iranian side's reticence, the silence, the slow attrition—even in this case, an attrition war of six hours for the Tusker—that shows a level of sophistication which is now magnified. Because what have we got here? In Washington, it's now seven in the morning, almost quarter past seven. Vice President Vance is supposed to take off now if he's to make it to Islamabad in time to have a day of negotiations on Wednesday. If he doesn't take off now, has the U.S. side failed to receive confirmation that Mr. Ghalibaf and Mr. Arachi and the other members of the Iranian delegation will be attending?

In other words, Vance is waiting to see if the Iranian side will come. The Iranian side has made conditions: we won't come unless there are preconditions. And your attacking our vessel is one of the examples of what's the point of negotiating with you. So that's a summary of, I think, what's happened and why it's important at 7 o'clock in the morning in Washington. One other footnote: for all the power of the American press, they don't know what's going to happen to the Vice President of the United States. Will he take off this morning for war negotiations, or will he not? That's how weak U.S. journalism has become.

#Nima

John, since you mentioned the case with JD Vance and his departure to Islamabad, from the Iranian media, IRIB, they said so far no delegations from Iran have traveled to Islamabad, neither the primary nor the secondary, because right now they're talking about whether they really need to send something, you know, with the quality, with the extent of what they had in the first round of negotiations. Do they really need that, or do they have to do it differently if they decide to send someone there, a delegation there? And what is this sort of, you know, you see they're hesitant in the way that they're thinking right now. Why is that the case, in your opinion? Yeah.

#Guest

I'm sorry, I didn't understand. Who's hesitant?

#Nima

Iranians. Yeah, it's mostly Iranians who are hesitant because, in my opinion, from what I've seen so far, Americans are just seeing if Iran is prepared to go, if Iran wants to go, because they're basically dependent on the Iranian delegation going there and being willing to negotiate with them.

#Guest

Well, remind me, how long does it take to fly from Tehran to Islamabad? My guess is about seven hours. Would that be about right?

#Nima

I think that could—no, less than that. But let me check it out.

#Guest

I would say somewhere between four and seven hours. I'll take that. All right, let's put it this way: in terms of this important juggle of time, right now there is plenty of time for the Iranian side to take off and reach Islamabad. It will take 20...

#Nima

It doesn't make sense to me. It says eleven hours.

#Guest

Well, that's probably a commercial flight with several stopovers. I mean, just if you check the flight distance between...

#Nima

It's only three and a half hours.

#Guest

Three and a half hours?

#Nima

Yeah, three and a half hours.

#Guest

All right. Well, that sounds about right. Let's suppose the plane flies a special route and it takes four hours. The advance is going to have to be in the air for at least two to get there. So the Iranian side does not have to—has only got to signal—Vance that we're coming, then he takes off. The Iranian side verifies that. Then the Iranian side has almost half a day or more to climb in the plane and move. So in terms of timing of this, each side will not move until the other. And I think it's clear, and I think it makes reasonable sense, whatever the criticisms on the U.S. side and on the Iranian side of each side's chief negotiator, it makes sense for Mohammad Ghalibaf to go. Have I pronounced Ghalibaf's name correctly?

#Nima

Yeah, Mohammad Ghalibaf.

#Guest

Well, Mohammad Baqer are his first two names. Happy to call him that if you wish. In any event, it's unfitting, just as you say, for the Iranian side to go if all the U.S. side delivers are the two unreliable traitors in negotiation, Witkoff and Kushner. They won't go, and they shouldn't go. Those two are there to protect Israel and the Trump family interests and what have you. No, it's Vance. It's Vance. And if he doesn't take off today, what we can see, what I can see from the president's calendar, it's a very unusual day. If Trump's going to go to war, as there is a consensus of some of our colleagues on your program during Monday, if they seem to believe that war is inevitable, that Trump will go to war, a new shooting stage.

Today will be the decision-making day. And the reason I say that is I can see, looking down at the president's calendar for Tuesday, he has unusually closed press access today because he's got an hour in the morning of so-called executive time. That's when he's meeting with his friends upstairs in the White House. And then he has, unusually—very unusually—three closed policy meetings: 1:30, 3 o'clock, and 5 o'clock. In other words, almost the entire afternoon is taken up with closed policy meetings. Of course, if you're president, you've got a million major issues, but this is war now.

And we know from past experience how they've come to decisions about when and how to attack and what the options would be, et cetera, et cetera. It's been in closed policy meetings. So if Vance is not at the policy meetings but they're being held, then the question is, what instructions does he have to negotiate on what terms? Leaving aside Trump's continuous dictation to the Iranian side, leaving aside the attack on the Tusker, leaving aside the relative weakness—I'll emphasize it—of the Chinese response to the attack on the Tusker, which was given at the foreign ministry in Beijing yesterday. Leaving all those things aside, the Americans now have to spend half a day with Trump preparing what they're going to do.

So if Vance takes off this morning, 7 o'clock roughly speaking, between now and 8 on our American audience's watches, we can be fairly confident that the meetings that Trump will make will decide what terms they are willing to accept if they can't predict what Iran will do if the US side starts bombing bridges and electricity plants and pursues all the options that we know, because they've printed, that they will pursue. What I don't believe they will do is try to send fleet vessels inside the Persian Gulf. They are staying out of range, out of respect and out of range of Iranian counterattack on the naval front. The proposed retaliation for the Tusker has been deferred, right? It's been announced that there will be a response. There will be a retaliation. And so it makes sense for the Iranian side to see if Vance is coming, to then determine what delegation goes with Mohammed Bakr, and then to see through Wednesday what Vance is bringing back.

#Nima

John, here is what Donald Trump just moments ago tweeted. He said that Iran has violated the ceasefire numerous times. And I think, John, when it comes to the attack on the commercial vessel, you know who controls it. Yeah. And looking at the blockade and so far what has happened, it seems that Iran is trying to put some sort of preconditions before the second round of negotiations. They had it before, you remember, with the case of Lebanon? Yes. Right now, it seems the main objective is the blockade. And because they saw this, you know, the main reason that Donald Trump has just right now tweeted that Iran has violated the ceasefire numerous times, it means that Iran is trying to say that the United States violated the ceasefire by the attack on the Tusker.

#Guest

Correct. I mean, I think it's very clear that the U.S. violated the ceasefire, especially when you consider where the attack on the Tusker occurred. It wasn't inside the blockade. It wasn't just outside the Strait. It was 550 Ks east of Bandar Abbas, which is where the Americans say it was headed. It was an attack by force to continue the worldwide all-seas sanction against Iran that's been in force for some time. At this point, the Iranian side is reserving its reply. Let's go back. If the Iranian side made a precondition that Israel stop bombing Lebanon, that precondition was met, though not exactly before the negotiations in Islamabad began. On the other hand, what's followed is that Israel and the Lebanese prime minister will meet in Washington or have begun meeting.

In other words, the Lebanese government that is dedicated to the destruction of Hezbollah by peaceful means, by political means, will meet with the Israelis to discuss their attempt to destroy Hezbollah by force, by military means. It's not exactly an outcome that benefits Hezbollah, but a cessation of fire over Lebanon benefits all Lebanese. Now, what the Iranian side has basically established is a double blockade, with the condition that each side is offering vaguely. The American side is vague on what it will allow to go through the blockade. What we know from the maritime media, and this is quite interesting, is that some large VLCCs, very large crude carriers, were passed into the Persian Gulf while the Tusker pursuit was ongoing.

So the American capacity to intercept the number of vessels that Iran would be seeking to load at Kharg Island or wherever—the American capacity is very limited to stop them all. So the U.S. blockade is partial, right? The Iranian blockade applies only to hostile states and military vessels, so that those vessels and their owners and their states which negotiate with the IRGC and the Iranian Ports Authority between the shore and Heshm Island will be allowed to go through if a toll is paid or if terms of agreement are reached. So the blockade on each side is partly open. The value of the double blockade is that there's a shortage of everything—not just oil and gas, but helium and a lot of the petrochemical derivatives on which a great deal of the world's industry depends.

I mentioned helium because it's surprising. Without helium, you can't get an MRI scan in a hospital anywhere around the world. So the war is going to get into the operating theaters and pathology departments of every hospital in the world that needs helium if there is a prolonged helium shortage. I mention it only because it should bring home to everybody how the war isn't just affecting gas tanks in the United States.

And we're running out of time. Everybody appreciates that spring is arriving in the Northern Hemisphere. But the clock is only four weeks away before the United States driving season will start. Memorial Day is, as it were, the beginning of summer in the United States. It's May 25. We're only a month away. So the clock is ticking against Trump to settle his war between now and four weeks. Everyone is also clear—our colleagues on your program have pointed out that as we move from spring into summer, the hot weather arrives.

And it's not simply a question of how difficult it is to fight in temperatures of over 100, 110 Fahrenheit, or 38, 40, 45. I've been in Iraq quite a lot, and frankly, it's a kind of heat where you can function more readily than you can in Dubai, for example, where you come in and out of air conditioning. But machines—U.S. machines, war machines—aren't as well calibrated as personnel. And so, we're running out of time as the unbearably hot season approaches. So the other time factor is Iran must either reduce its oil production, its oil field production, in 14 days thereabouts, or find new storage. The tankers that are going in empty can be filled, but there's a limit of time, roughly 14 days, if they can't get out, and then the oil field production must be cut.

If those sorts of economic pressures are inflicted on Iran, we know what the retaliation will be against Saudi Arabia. That's a prime target because it continues to get oil out through the Yanbu pipeline, through the Yanbu terminal, through the Red Sea. I'm pointing my hands and I'm moving my head as if I'm on the map. But the fact is that there are a range of Iranian targets for retaliation over the next 14 days. But we have a limit of 14 to 28 days in which this war is either negotiated to a settlement or the U.S. attempts to settle it by military means—the Israeli option, if you like, the genocidal option against Iran.

And the problem for the Americans is, I think there's enough evidence to say that the Joint Chiefs of Staff and the Vice Presidency and probably military intelligence and the CIA are extremely doubtful

that a resumption of war like that can achieve any of the so-called war objectives. If that's the case, to repeat the point, the U.S. side is facing a much greater unpredictability of its adversary. And Iran wins by surviving. Iran wins by prolonging this war beyond the 28 days into the U.S. driving season, and then we're in the election campaign season. So all of those things make right now, today, the decision of whether Vance takes off now and whether Mohammad Ghalibaf takes off a bit later in the day extremely important.

#Nima

You know, the point that is so important right now, I think... Just moments ago, we've learned from the Persian media, Tasnim News. They reported that Iran has prepared many surprises for the United States, because their prediction is that the war is going to continue, this war is not going to end, and they're going to get back to the war. That's why they're preparing for that. And the other point is, John, when it comes to the weather, the southern part of Iran and some parts of the southwest of Iran have that sort of extreme temperature. It goes high. But you see, all GCC countries are in that region, and the temperature is going to be severe, the way that they're going to be hit by the temperature in that region.

And how do you see it? Because many people, the argument of the people that the escalation may not happen is because of the weather. If Donald Trump—because he said that he's going to go after power grids and power plants—if that's the case, that would be the end for many of these GCC countries. For Iran, that's not the case. I would say that's not the case because, just considering a little bit of the southern part of Iran and the west and southwest of Iran, the rest is not feeling that much of a high temperature. And that's why I think Iran is feeling somehow to be in a comfortable position when it comes to the escalation of going against power.

#Guest

I think you're making the point that Iran and the Iranian people can endure the high temperatures in a way that the Emiratis cannot. That the retaliation for Trump's threat to destroy electricity plants will be an electric war campaign on the Iranian side. We've been talking about this for many years with respect to Russian strategy and the Ukraine war and the electric war campaign, which has been restricted by President Putin in its application across Ukraine. But electric war would have instant application at this season, because it obviously would turn the air conditioning off, it would turn the water desalination plants off. It would make life intolerable for the Saudis, the Emiratis, the Qataris, the Kuwaitis, the Bahrainis.

So retaliation for what Trump is saying would, in fact, be far more costly than the Arab sheikhdoms have ever experienced. They have lost the capacity to endure the heat. As I said, I spent the month of July a couple of times in the Iraqi desert. It's called a desert from a Western point of view. It isn't really a desert. But still, the temperatures—I was surprised at how bearable they are if you adopt Bedouin customs and you don't rely on electric air conditioning, and you don't drive around in a car

with the windows closed and air conditioning. If you adapt in a Bedouin or local—call it local, since we're talking about both the Iranian side and the Arab side—the local capacity to endure the summer weather is thousands of years old on either side.

But the capacity of the... to survive retaliation against their electricity systems is much lower than Iran's. So if you and I can say it, it's so obvious, it will be difficult to believe that U.S. military and civilian intelligence services and the Joint Chiefs and their operational planners haven't figured it out. So what we have is, in fact, a performance by Iran Trump and his Jewish advisers who support the Israeli line that only by liquidating Iran—liquidating and causing genocide—do you remove their capacity to represent a threat in the future to an expanding Israeli state. Well, let's call that the Kushner-Witkoff-Miller group in the White House around Trump.

And they're the people he tends to talk to, not in the so-called policy meetings downstairs in the White House, but in the family quarters upstairs. And that's where the tweets come from. That's where the genocidal language and the swearing and the vulgarity and the aggressiveness come, dressed up as a form of violent bluff in a game he thinks he can control. Well, I think we're beginning to understand that. I think that the Iranian negotiators, though—I think Arachi, and I've forgotten the other couple—have been educated in the UK. They don't have quite the experience of US culture. They have more experience of European or British culture. So they may misunderstand the degree to which Trump—the way the politics work around the White House.

And they may, in fact, see more threat than there is in the way Trump is posturing. On the other hand, there's no doubt about his violence. And then you go back to your question: why attack the Tuska now? Why let very large oil carriers enter the Gulf without being intercepted? And why attack the Tuska out at sea? Why did that happen? Clearly, it took six hours for the U.S. side to make up its mind. So what sort of signal is that? And how does the Iranian side interpret an American signal? Then how did the American side interpret no signal from the Iranian side? Silence. "We reserve our right to retaliate. You can bet your life we will retaliate." That's what the Iranian side has said. The U. S. cannot penetrate or anticipate correctly what that means.

The Iranian side can correctly see what the U.S. side is doing. But for the life of me, I can't understand what the U.S. thought it was signaling, except that I believe it was a provocation to make it easier for them to trigger an Iranian reaction. That would then confirm what Trump, you said, tweeted just a few minutes ago or a few hours ago. He needs an excuse to restart his bombing campaign. Well, the Iranian side hasn't given it to him. So it's a strange kind of Mexican standoff with guns drawn. But one side doesn't understand the other side at all well. And that's the case of the U.S. side understanding Iran. So I'm inclined, therefore, to downplay the level of the strategic value of Trump's threats.

#Nima

Yes.

#Guest

The tactical value—he thinks he's playing a card game or a dice game in which he's loaded the dice. His tactical competence is very low. So the operational issue we've just discussed: Iran will retaliate. Therefore, if they can retaliate and the U.S. can't suppress that capacity to retaliate, we're back where we started. Everybody's worse off, but the Iranians survive better being worse off. The Arab side cannot.

#Nima

John, yesterday our friend Larry Johnson reported that in the security meeting they had in Washington, it seems that Donald Trump was talking about nuclear bombs being used. And he was talking about nuclear codes. And he was confronted by General Keane. And basically, it seems that General Keane said that's not going to save him, that's not going to help him. What do we know about the situation with the Trump administration? On one side, you see the mainstream media, I think correctly, pointing out that Donald Trump is under tremendous pressure. He wants to put an end to the conflict as soon as possible, not only with the case of the military and the way that he has sent a lot of weapons to the region—aircraft carriers, you mentioned. You have George W. Bush there, you have Gerald Ford getting back.

#Guest

Abraham Lincoln is there. Gerald Ford won't be there because it's in repairs in Croatia, and it's going to stay there. It's being replaced by a vessel coming up from the east coast of Africa, and it will arrive more or less later this week. So there will be two carrier groups, yes.

#Nima

And looking at the whole case, we had a report from the UAE, the running-out-of-cash report. And this is a serious situation in the Middle East. And Donald Trump bears the responsibility for what is going on. How do you see the desperation? On the other hand, he posted yesterday that he's not under any sort of pressure. He doesn't need to put an end to the conflict as soon as possible, right?

#Guest

Well, I interpret that in reverse. He's having to answer the criticism that stings. He's responding to criticism that he's losing his grip. He's under pressure. When he tweets like that, that's not a reassurance, that's a confirmation of the reporting. I have to qualify what I'm saying because it's been many years since the Carter White House in which I served. There was nothing like—I'm trying to think—was there ever a situation of panic, of desperation in a White House that's anything

comparable? First, in my experience, nobody has the mental deficits, the cognitive, the memory deficits, the neurological deficits that Trump has. That's first. Second, I'll leave aside his neurological health, which can be diagnosed in a variety of ways, but they result in a deficit of memory.

It results in a deficit of the capacity to talk sequentially, with sentences and so on. He doesn't remember what he said a very short time before. He's not in dementia; that's not the nature of his neurological problem. Second, he's psychopathological, psychologically. That means—and there's plenty of evidence of that since he was a child, and all of that's in Mary Trump's book—that he has all sorts of behavioral patterns. There's violence, personal violence. There's vanity. And these are compounded by some of the physical symptoms that you see. This is a man who's highly, let's say, highly strung, highly sensitive to pressure, and to the sense that he must control, if necessary by violence, everything and everybody around him. And he does that to a large extent.

Those who are around him, including people like Mila Vitkov, Kushner, and other family friends, these people cater to his moods, and there are sharp mood swings, and so on and so on. Under the pressure of a war that hasn't worked out in any way like he thought he could achieve, he begins to show what you could call a panic and desperation state. Yes. And that becomes, in his case, a predilection for more violence. Yes, that's true. You raised the important question of, is he likely to allow the use of tactical nuclear weapons? We've discussed this because it's very clear that the Israeli side would be more inclined to use the nuclear option because they are running out of other options for achieving the genocidal outcome to this war that they've sought—the total destruction of Iran's governance, the total destruction of Iran's capability to build missiles that threaten Israel, and so on.

Would Trump agree to that in desperation anytime soon? Well, I'm in no position to jump from diagnosis of Trump's brain, Trump's emotional character, the psychopathology of himself and those around him, to a strategic question like that. I would, from White House experience, say that ultimately presidents, however sick—in dementia, as Biden was, or disabled, as Woodrow Wilson was—ultimately presidents will, until there's a constitutional overthrow in the country, be subject to political pressures. And the political pressures are intense, as we just said. If Memorial Day starts in one month, U.S. drivers have to start planning their summer holidays. Driving requires gasoline. Gasoline is doubling in price.

President Trump's attempts to suggest and jawbone the price down and jawbone the anxiety haven't worked. He's showing in the polls all the indications that voter opinion is growing against this war. It's up to nearly two-thirds disapproval of the war in the latest NBC poll. He is failing to do what presidents must do going into the political campaign season. He is starting behind. I've forgotten the numbers. They're rough. His negative approval exceeds his positive approval by between 13 and 15 percentage points at the moment. If you go into a presidential election campaign that far behind, you're still going to end up behind. And that represents a serious personal risk. We've gone through this before.

If he loses control of the two houses of Congress, he faces impeachment majorities. Impeachment majorities not just of himself and Kushner and Witkoff and those who've benefited from all the insider trading that goes on every day. So a lot of his tweeting is related to insider trading on the commodity markets. He, except, would face impeachment and so on and so on. It would be a political bloodbath, not from a Russian point of view, from my point of view, because the Democrats want to end the wars against Iran, or the Democrats want to end the war against Russia, or the Democrats want to end the war against China. They're not a peace party. Absolutely not. But the only thing Trump cares about is they're an impeachment party.

And he's already been through and survived one round of this. He wouldn't survive the next round. So he's facing, let's say, from Memorial Day on, one month away, the kind of pressure that he cannot survive unless he does something different. Now, we've seen, to get to the nuclear question again, what happened when the ICE army, the presidential guards, so to speak, tried to destroy the democratic governance of the cities of the country—Los Angeles and Portland, Oregon, and various others, and Memphis, Tennessee, and Washington, D.C.? What happened when they killed two people? Well, the answer was, those two deaths by ICE caused a significant retreat by Miller and the entire Homeland Security system.

Do we agree that that's what happened? Never mind the alibis, never mind the evidence of what exactly happened. Public disapproval, to put it mildly, of those two murders by ICE caused Miller, the most violent of Trump's advisers, deputy chief of staff, to retreat. Now, I would take that as a good example of what Trump, a white supremacist who's in favor of murdering all sorts of people on the street if necessary, who's definitely in favor of sending troops into Democrat-controlled cities in order to destroy their capability to vote Democrat at the midterms—Trump's instincts were controlled. He was actually forced to retreat.

Now, how he covers his retreat is for Republican podcasters to explain to him, not us. But if you ask me, I do not regard the likelihood of his reaching, in desperation or temporary insanity, for nuclear weapons to be a likely outcome of where we are now. He will retreat rather than fight when he faces a threat as serious as the impeachment majority that he would face come November the 3rd, Election Day. So I'm saying rather a lot as a very aged veteran of a White House that's long forgotten—the Jimmy Carter one. Maybe I'd better stop talking about the past and applying it. But these are strong rules that control even mad presidents.

And I don't think it's a good idea to understand the politics of what's about to happen in Islamabad and in the Middle East and in the U.S. by treating the President of the United States as mad—that is to say, out of control, that is, unpredictable. No, he's predictable. He's predictable. And the outcome of predictability now is he's got four weeks left to extract himself from a situation that is causing global recession and serious political damage to him at the polls. He's got four more weeks. So this is not an expression of hope. It's an expression that you asked for: what's a rational response theory of how this particular man, neurologically damaged, psychopathologically motivated, but not insane, not mad, and not out of control of the politics of staying in power.

Staying in power and keeping his money—those are his bottom-line preoccupations. Staying in power and keeping his money mean no nuclear weapons attack. No. They mean probably no resumption of the kind of violent bombing that he's threatening. No. The question then is, can he get out of the situation he's put himself in and that the Iranian side's defense has put him in? He might go out by bombing and then exiting. Richard Nixon tried that one. It's not unprecedented—suddenly escalating the violence, declaring victory, and making an exit. But he's only got four weeks to do it in. And you've given a very good reason why the retaliation of Iran would make it even more costly. So it won't happen.

#Nima

He's somehow in a very desperate situation. This is a trap. As time goes by, it's getting bigger and it's getting more consequential for Donald Trump. Because on one hand, you look at, John, the outcome of this war, and if it was to improve the Israeli position in the region, it has got totally the opposite. Israel today is naked in terms of the air defense system, the defensive capabilities, because the radars are not there anymore. And these are huge losses for the Israeli side. On the other hand, Donald Trump has a new issue, which is the Strait of Hormuz. And he's not having the upper hand considering that issue. Iran is not going to lose control of the Strait of Hormuz, in my opinion. There is no sign in Iran—they're all talking about the Strait being under the control of the Iranian government forever.

That's what they're talking about, together with Oman—not only Iran alone. But the other issue, John, is the enriched uranium and the enrichment of uranium on Iranian soil, which is, I don't see Donald Trump getting anything better than the JCPOA. Nothing. The best-case scenario for Donald Trump would be something even, I think, less important, less successful than the JCPOA. This is the problem that he's facing. You know, Israel is not in a better position right now. The Arab states are not there. The UAE is asking Donald Trump, is asking the United States to leave the UAE, you know, because they don't want an American base in the UAE, at least that's what they said. And you see Spain, Slovenia, Ireland—they're asking the European Union to discuss the suspension of its association treaty with Israel. The situation, you look at the case of what has happened so far, the outcome is disastrous for Donald Trump.

#Guest

I don't disagree with you. I'm reluctant to stretch. You've already got me today speaking on my Moscow chair about US presidential politics. I can't go back to Arab politics, in which I was involved before, to disagree with you. No, we can't do that. Maybe if I go to one interesting detail, and that is the question of a report that CNN has been running. It's one of those strange CNN-sourced reports which it was reluctant to print in Washington, so it had CNN's Indian affiliate run it. And it claims that there was a memorandum of understanding reached between Vance and Ghalibaf at the first round of Islamabad meetings, and that the terms were agreed at the point of initialing, that the

negotiations were then suspended because Trump, in one of his phone calls to Vance, said, no, don't sign now, come back and we'll discuss the terms.

And there's some interpretation of CNN sources that Trump wanted to take the credit for the agreement if it was finalized. Trump wanted to check with Netanyahu himself, and the Jewish advisors, and also the domestic political advisors. They weren't able to do it all at once. That's a CNN fiction, possibly. Is it correct that there was a memorandum that Vance had initialed? If so, will we see the evidence of it if Vance is taking off? It's now almost—what is it?—it's almost eight o'clock in the morning Washington time. His plane has to start revving up right now to take off in order to have a day of negotiations in Islamabad on Wednesday, tomorrow. So let's put it this way.

Without exaggerating all of the different dimensions of the problem that Trump's war has caused for his allies and all the opportunities created for his adversaries, principally Russia and China, are there points in a memorandum of understanding that Vance and Ghalibaf would accept and that they can take home as a piece of paper that's more durable than Chamberlain's piece of paper from Munich with Hitler? Is there such a piece of paper, and what would it say? And then we have a more serious problem, don't we? Can you imagine, from the Iranian point of view, what the piece of paper Mr. Ghalibaf would take home to Tehran, and what would be the reaction to the terms? You said, and I agree with you, the Iranian position is that the Hormuz regime must stay in place, at least because it provides the formula for reparations.

The toll regime will generate, and we did the arithmetic last week or the week before, roughly, for Iran, \$20 million a year, if allowing the discounts of friendly states' vessels to go through and so forth. Iran cannot extract the reparations required to repair the damage from the Arab sheikhdoms. But this way would work so that the toll regime must stay in place. If the toll regime must be the tool of reparations, and reparation is one of Ayatollah Moshe Bar Chamenei's four or five points, then this is a must. And it's for as long as possible. And yes, it's shared with Oman.

So the concept of territorial sharing—and it's not an unprecedented concept—form of charge on a waterway: the Turks, the Danes, and others. There's plenty of history of such a formula. In any event, this is unprecedented. The damage done to Iran is unprecedented. So we have to have an unprecedented sort of—this is—so what we would say is, if the paper initially that Ghalibaf takes back to Tehran, what else would be on the piece of paper that you think there'd be a consensus in support of? Yes, the regime of Hormuz—would that also constitute a guarantee against resumption of war?

Because closing the strait would be a better guarantee of good behavior than anything the Americans promise, since everybody agrees nothing they promise is worth the paper it's written on. Do we agree that Hormuz then becomes the linchpin guarantee of security and no resumption? Two, the U.S. doesn't replenish, refuel, or repopulate its military bases in Saudi Arabia and the Emirates.

Right, we agree with that. And there's no return of the U.S. Navy to Bahrain, to its Bahrain base. Yeah. So everything then hinges on, as a linchpin of all the other points on the piece of paper, the Hormuz Strait regime must remain the Iranian formula. Is that your view?

#Nima

Yeah, yeah. All right. John, there's another, you know, just breaking news here. I don't know if you can hear it. The U.S. Navy seized an Iran-linked vessel, MT Tiffany, in the Pacific area.

#Guest

In the Pacific area?

#Nima

Yeah, it's just...

#Guest

Okay, well, without being able to look very carefully at that particular report and supposing it to be true, it confirms what we began with. The U.S. side is now enforcing, with force, interdiction of all Iranian vessels it can get at on all the seas of the world. So it's not simply—it's an escalation of the worldwide sanction against the movement of Iranian vessels. And they're not simply Iranian vessels moving Iranian oil; they're moving Chinese cargo and any other cargoes. If it's in the Pacific, that confirms what we began with. Second, for that to have happened when so many other vessels are being let slip through indicates that this sort of seizure is both opportunistic and a form of signal.

So do we find that some people are trying to trigger an Iranian retaliation to enable Trump's, the Miller, Witkoff, Kushner, Israeli line to resume? That's bombing and genocide and liquidation, all of those things to destroy Iran's capacity to produce oil and so on and so on. Is that another signal? If it is, it won't work. But is it a signal that there will be a negotiation, and this is yet another test to disrupt the negotiation? The U.S., the President of the United States, does not want the Iranians to come back to Islamabad. Is that what that means? Remember, I think— I don't think I'm repeating myself—when the Islamabad first round began, am I right in remembering there was an attempt by a U.S. destroyer to enter the Strait of Hormuz and, as it were, challenge the Iranian side to reply?

This was actually as the meetings were beginning in Islamabad, right? And the Iranian side warned, "Turn around or we open fire." And, in fact, the U.S. side did turn around and exit Hormuz. Was that an attempt to torpedo the Islamabad negotiations? If so, somebody in the White House is telling the Joint Chiefs and the operational planners at CENTCOM to do these things. Is Hegseth ordering this—

such operations for political purposes? And if so, who in the White House is running orders? Is this another one of those? If it is, it's a failure to begin with, isn't it? It's so demonstrably irrelevant to the issues we've been talking about.

It can only be intended to stick a pin, as it were, in the Iranian bottom and watch the Iranians go crazy. And that's obviously not what's happening. The question then becomes now where we started: is Vance to take off anytime soon from Washington, D.C.? And is Mr. Ghalibaf going to take off sometime later today from Tehran and head to Islamabad? And when they get there, if they get there, is there a piece of paper that each of them can take home and wave more credibly than Chamberlain did his piece of paper from Munich? And I think you've spelled out for our audience what the piece of paper has to say.

#Nima

Yeah. John, before wrapping up, here is one question from our audience. They're asking, and it's related to the case of Ukraine and the war in Ukraine: will Russia carry out its threat to strike sites in the EU that produce drones and components for the Ukrainian army?

#Guest

It's a good question, and it relates, just for everybody else to understand. There's increasing evidence that Poland and the Baltic states are making their territory and their territorial waters platforms for drone attacks against all sorts of Russian targets—both targets at sea, ships, and targets inland: refineries, oil infrastructure, and so forth. In response, former President Dmitry Medvedev, now the Deputy Secretary of the Security Council, the Politburo in charge of security policy and planning, advising the President, issued a clear tweeted warning that if the Europeans collaborate in the manufacture of these drones, their factories will become targets.

This is a continuation of the Russian rhetoric that when the European side, whether it's French mercenaries or British technical advisors, assists Europe in the building or manufacture of missiles, drones, and other weapons that attack Russia, both on the Ukrainian battlefield and elsewhere—when they do that, they become targets. That's the rhetoric. So the question then is reasonable: is this another one of those red lines that Russia announces but doesn't implement? And the answer then is, well, there's no sign that the Russian red lines to date have been implemented by attacks that would involve NATO territory and an Article 5 declaration.

So the short answer is that's the context. That's the threat. That's the red line. And is there evidence that the Russian side is prepared to meet force with its warnings? Outside the Ukrainian battlefield, no, not yet. So why does Mr. Medvedev issue a threat for which there's no force capacity to implement? Are we really talking about the deployment, for example, of the Yars missile, which

could hit virtually any target within European NATO? Would that be fired? The practical answer is no. On the present basis of the way the war is being fought, no. The answer is no. Why am I saying this categorically or as confidently as this?

Because all my sources show me that the president's decision has been that the operational pace on the battlefield will be slow, that not even the complete capture of all of Donetsk region will be completed until the autumn, six months away or longer. There's no confidence that I see reflected in Russian government officialdom that there will be an end to the war on the Ukrainian battlefield in this calendar year, and that the pace of operations, for all sorts of domestic reasons—casualty control, cost control, and so on—is slow. It gets later and later. We've seen a whole three years of podcasting in which our colleagues have predicted the Russian victory will be complete within weeks or after the next offensive season, whether the season's the summer season or the winter season. None of those things have come true.

And there are domestic Russian reasons. And right now I can just end up by saying Russia has a, and the president has his own particular midterm election problem. And it's serious. It can't be, it shouldn't be brushed under the rug. What's that problem? Answer: Russia is heading into a prolonged recession this year. The official GDP report number is minus 1.8% GDP decline in the months of January and February. Remember, recession is officially defined as a continuous period of much longer than that. But we know that the period is longer because the chairman of the central bank, the governor of the central bank, Elvira Nabiullina, published a strategy report last October, and I've spoken of this, written it up in *Dances with Bears*, to show that she expects and predicts the possibility of minus 2% to 3% GDP for this year and for next year.

Now, presidents don't run for election. Members of parliament don't run for election, and the election day in Russia is roughly September 25 of this year. Facing recession, that macro reported as 1.8% is more than minus 5% in the Urals regions. So you've got widespread suffering as a result of the domestic economic conditions, not the war and not anything the NATO allies, the US, and the Ukrainians have done. This recession is brought on by a 15 to 21% central bank interest rate and a commitment from Nabiullina and her supporters around the president for an anti-inflation, high-interest rate policy.

And that's been choking off investment, damaging the construction industry, and with all of the resulting effects that Russians are complaining about. So you can – on top of that, you get these sudden viral scandals of individuals suddenly producing letters to the president. There's one that's hit the news in the last few days, in which this person who lives near Monaco, a model, has produced a letter to the president complaining about flooding in, if I'm not mistaken, Dagestan, animal culls in Siberia, and the repression of Internet access throughout the country. And these are popular issues that add to the underlying economic loss of confidence. And loss of confidence in the president is beginning to show in the approval ratings.

So all of these things combined, without exhausting everybody's patience, mean that domestic consolidation has to be achieved. And there's a real prospect. I went through the poll numbers in *Dances with Bears* last month. There's a real prospect that there might be an opposition majority in the State Duma composed of Communists, LDPR, and other parties—an opposition majority against the United Russia ruling party, which has a majority at the moment. From a Russian point of view, from President Putin's point of view, from a Kremlin election campaign point of view, this is a serious challenge, a very serious challenge. And it's one in which you can't go making escalation adventures in the NATO states. You can't.

#Nima

Yeah, yeah. Thank you, John. Thank you so much for being with us today. A great pleasure, as always.

#Guest

Thank you very much for having me. See you next week. See you.