

Mark Sleboda: US Navy Just Fled From Iran – Trump's Blockade Backfires

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#Nima

Hi, everybody. Today's Saturday, April 25th, 2026, and our dear friend Mark Sleboda is here with us. Welcome back, Mark. Nima, thanks for having me.

#Mark

It's always an honor and a pleasure to be on Dialogue Works.

#Nima

Mark, let me start. Please hit the like button, helping us reach more people. And please follow Mark on his Boosty account. Right below his name, you can see [Boosty.to/TheRealPolitik](https://boosty.to/TheRealPolitik). You can go there and subscribe, and if you subscribe, it's even better. I think you're going to find a lot of information about not only the war in Ukraine, but also geopolitics and the war in the Middle East. Mark is a very, very sharp writer, I would say. Mark, let me start with this current situation. It's somehow—look at what's going on—it's somehow ridiculous, because we had the Iranian foreign minister going to Pakistan. He said, he posted on his X account, that it's a tour: "I'm going to go to Islamabad, then Muscat in Oman, and later on to Moscow." And he's going to respond to the message they have received from Pakistan, from the United States through Pakistan.

They wanted to respond to that. They've written a response. But later on, we learned Donald Trump is sending messages—Jared Kushner and Steve Witkoff too. It all, you know, came out of nowhere. It wasn't planned, because Iran didn't plan to talk or to meet the American negotiator delegation in Pakistan. And it was all made up. They made up—right now, just moments ago, they announced that it was canceled because, you know, Iran's foreign minister right now is in Muscat, in Oman. So if they go there, there's nobody to negotiate with, to talk with them. And how do you find the situation right now with these sorts of moves on the part of Donald Trump? I don't know if we can call them moves, but he's trying to negotiate on one hand. On the other hand, you see he has the blockade of the blockade. Your understanding of that?

#Mark

So, first of all, his insistence on meetings, which Iran refused to attend first on Tuesday, and then, as you said, when it was announced yesterday that the Iranian foreign minister would be arriving briefly in Islamabad and would be speaking to the Pakistani mediators and then would be moving on to Muscat and then to Moscow. The U.S. immediately took that, I guess, as a sign, or they wanted to push the Iranians to talks. So they obviously announced that there were going to be talks. We see this repeatedly with the Trump administration.

We saw it most spectacularly last week, at the end of last week, when the Iranian foreign minister made this—I'm sorry, I'm going to have to call it—disastrous social media post where he declared the Strait of Hormuz open and free, without any of the qualifications that were instrumental to that. And then Donald Trump leapt on it and started making the most insane—just making stuff up—that the Strait of Hormuz was completely free, and Iran had promised never to block it again, and they were going to hand over all of their enriched uranium to the United States and never enrich uranium again. And they were going to help the U.S. remove sea mines from the Strait of Hormuz.

And they were going to give him a little pretty pink pony with a ribbon attached and just all of this ridiculousness. We saw the same thing quite often in the conflict in Ukraine, where the United States would announce things and Russia would be like, no, we never agreed to that. We never agreed to meet. I often think that the Trump administration does this with the intent that simply by saying so, the other side will be pressured into making it so, right? That simply by the speech act, that will somehow pressure the other side into accepting that reality. We've just seen it so many times now. And it didn't work. The Iranians just ignored him and then went on to Islamabad. And they've also told the Americans before, we're not meeting your twink son-in-law and your real estate buddy.

Those are not diplomats. If you want to actually conduct serious diplomatic business with us on our terms, then you send real diplomats or real politicians, real figures within your administration, not your cronies and your nepo babies, right? I mean, that's the situation. And I mean, there's no... Besides the fact that neither one of them actually has a position within the Trump administration or within the U.S. government, there's also the fact that we had a British diplomat a few weeks ago refer to them as essentially Israeli assets. So, I mean, it's not surprising that the Iranians have said they don't trust them and they don't want to meet with them. And there's no reason why they should.

#Nima

Right.

#Mark

So, but quite obviously, the Iranians were going to refuse a meeting with anyone, much less Jared Kushner and Steve Witkoff. And that's because of the bottom line that the IRGC put out — that there would be no further negotiations with the U.S. until their kind of sham counter-blockade is lifted. Now, this counter-blockade, it must be said, has very limited effectiveness. It is not being conducted — it's not a blockade of the Strait of Hormuz. There are not U.S. ships lined up, you know, across the Strait of Hormuz, right? That's not the situation. In fact, they're not even anywhere near within easy cruise missile distance or drone distance of the Iranian coastline.

In fact, all the interdictions that have taken place haven't even happened in the Gulf of Oman. They've been beyond that, right? They've been in the Indian Ocean or the Indo-Pacific. And why? Because the U.S. Navy is still too afraid to come that close to the Iranian coastline. And they've stopped a total of four ships so far — a couple of them Iranian-flagged and a couple of them Iranian-linked, meaning they were either carrying Iranian oil or they were bearing stuff into Iran. Meanwhile, though, we're told by no less than the Financial Times and Lloyd's and Kpler that as of the middle of the week, some 34 tankers had either gone into Iran or out of Iran.

Right. You know, some going in, some going out. And that had not been intercepted. So what's going on here? Well, first of all, the blockade — the U.S. Navy has 16 ships, right? That's what they have. That's their forces in the theater there. And to chase dozens of Iranian tankers all over the wider Indo-Pacific is very hard. Second of all, these tankers can easily skirt the whole Gulf of Oman area. All they have to do is skirt the coastline of Iran, come out of an Iranian port, or the same way going the other way around, but come out along the Iranian coastline.

And we know the U.S. doesn't want to go anywhere near the Iranian coastline because of Iran's anti-ship cruise missiles, aerial drones, surface drones, underwater drones, mini subs, aircraft, cruise missiles, ballistic missiles — you name it. Iran has a plentiful quiver with which to target the U.S. Navy, right? Which is why no U.S. Navy ships have approached the Iranian coast in this entire conflict. This has never happened. So they're well out. A fast attack boat, you know, lots of things — they take the Iranian, skirt the Iranian coast, and then they enter Pakistani territorial waters, right? They skirt the Pakistani coast, right? They have the right to innocent passage through Pakistani territorial waters. Is the U.S. going to attack ships in Pakistani territorial waters?

Iran is betting that they will not. They certainly haven't so far. Do they want that kind of diplomatic incident with Pakistan? No. Then they just skirt Pakistani waters, right? They can unload things there if they need to, change them to another ship, arrange deals. If not, they enter Indian territorial waters. Is the U.S. going to attack ships in Indian territorial waters? No, they certainly are not. Same thing — they can unload them there or go all the way around India, and then they're well off into the Indian Ocean past that. That's why this blockade is a sham, right? It is actually kind of silly when you look at the declarations.

Yes, they have caught a number of ships that were well out into the Indian Ocean or beyond — I believe one near Malaysia, the Straits of Malacca, right? You know, those types of interdictions. But all Iranian tankers coming in and out have to do is hug the coastlines, travel through the territorial waters, and it's no problem. That's why this blockade isn't really so much real. However, it's what the Trump administration is using. They imagine it as some kind of leverage against Iran. And more than that, Trump is portraying it as some type of victory, some type of overpower. And Iran is not willing to accept that posturing from the United States.

They're not going to give the United States the PR necessity of power, you know, of declaring victory. Whatever the, you know, the inside of the sausage of any potential deal might be, it's different. The U.S. is so concerned with their image — the image of, you know, the hegemon, of the victorious power. And Trump more so, because his own personal image is conflated, of course, at this point with the United States. And no one cares more about, you know, the narcissist-in-chief that is Trump. This is very similar to the situation in the Cuban Missile Crisis back in the 1960s, when Kennedy eventually reached a deal through back channels with Khrushchev, where the Soviet Union would remove nuclear missiles from Cuba.

And in return, the U.S. would remove Pershing nuclear missiles from Turkey and Europe that it had placed there, which is what caused the Soviet Union to put missiles in Cuba in response. But by agreement, that's part of what the U.S. insisted — that second part was not publicly made known until decades later — and the whole thing was presented as a major U.S. victory over the Soviet Union in Cuba. Because the U.S. is so concerned with their image as the hegemon, because the whole... hegemon, hegemony, is about power. And if the other countries don't fear you, don't believe in your strength, then there is no hegemony. Because, you know, I mean, it is the Game of Thrones maxim, right? Power resides where men believe it resides. So that's actually very important.

The narrative matters because the narrative ultimately is what is the foundation of U.S. hegemony in many respects. So Iran is not willing to give the U.S. the public, the rhetorical victory, on top of, of course, the fact that the U.S. has seized four Iranian ships, and Iran, tit for tat, has seized ships in the Strait of Hormuz that it at least can connect with the U.S. and/or its allies in response. Now, there is a question that was raised in this whole incident with Araghchi's tweet, and there is talk in numerous Western newspapers about a divided Iranian leadership, at least on the issue of negotiations moving forward. And Trump leapt on this and used that as the excuse to unilaterally extend the ceasefire. "Oh, the Iranians need some time to get their shit together and accept my ultimatum. So we'll give them a few more days."

#Nima

That's basically what they said.

#Mark

Now, I actually believe it is extremely likely that there is some disagreement within the Iranian institutions of power. The regime, if you just want to use the technical rather than the normative language, loaded meaning of the word, right? They had most of their senior leadership wiped out in decapitation strikes. They've got all new people. Some of them have probably, you know, not worked with each other because everyone's hunkering down in their bunkers, right? No one knows for sure what the condition of the Ayatollah, Mojtaba Khamenei, you know, the Supreme Leader, is. Is he well? Is he in serious medical condition? Is he disfigured, as Pete Hanks said? You know, I mean, all of that — we don't know his condition.

We don't know. But it seems likely that the way Iran has gone about their defense, this mosaic defense, this devolution of power, it makes perfect sense. In a crisis situation where a lot of the political and clerical leadership is wiped out in decapitation strikes, it makes perfect sense that power be devolved to the IRGC in a crisis, security, at-war situation. It does. It makes perfect sense. And I predicted in my own videos on my own channel before the U.S. attacked on what the attack might play out like. I said, well, if they conduct these decapitation strikes, the most likely scenario is not, quote-unquote, regime change, but simply that the IRGC takes firmer control than they were before. And I think that's the situation.

I think that there was some confusion that people in the foreign ministry might have been, you know, more willing to at least engage the Americans in diplomacy. That's their job, right? I mean, we tend to forget that in the U.S., where the U.S. State Department is just another department of war, right? But that makes perfect sense. And I'm sure there are people of different opinions within the broader Iranian institutions of power within the government now, just like there were in the Trump administration or between Republicans and Democrats in Congress on foreign policy issues. But ultimately, right, TASNIM, as the official-unofficial media outlet slash propaganda outlet, depending on how you want to call it, of the IRGC, you know, put out...

#Nima

It's semi-official.

#Mark

Semi-official. That's why I said official, unofficial. Yeah. They put Aragchi to task. And then quite obviously, you know, the IRGC exerted authority. And their hard line, their red line that there would be no further negotiations until the U.S. gives up their sham blockade has held. And I think that's the correct decision. I don't think that you can make concessions to the United States. I think that just shows weakness, particularly with this administration. But even beyond that, we've seen that multiple times with Russia. I think Russia, the Kremlin, has made mistakes in the conflict in Ukraine by being too willing to play political games with the Trump administration. And there are obviously disagreements within the Russian National Security Council.

So, you know, it's not like some big shocking thing that, you know, some people within Iranian institutions—I've gotten some pushback from that. How dare I even suggest that people within the Iranian government might, you know, have slightly different opinions on the way forward. Like, what kind of, um, you know, ideological, um, dogmatic position is that? That's just, that's just realist, right? It hasn't affected anything. The IRGC exerted control. One of my favorites was when the IRGC, after Trump had, you know, gone through this running away with Iraqis' posts and declared that the Iranians would never close the Strait of Hormuz again—I think it was within a couple of hours that the IRGC announced the Strait of Hormuz was closed again.

And in doing so, the message that they sent out to ships in the Strait of Hormuz, because it was recorded and it was out on social media, was that, you know, the Supreme Leader makes the decisions and we are the enforcement body of that with regards to the Strait of Hormuz, the IRGC Navy. And that therefore it is us that will make pronouncements about whether traffic is open or not. And you should listen to us, not to some idiot's tweets on Twitter. And I mean, it was said pretty much like that. I mean, that was in English for, you know, for the international captains, right, to understand, you know, lingua franca and everything. And I mean, I choked up laughing. I spilled whatever I was drinking everywhere when I heard that.

And you can interpret that as, who is the idiot tweeting that you should not pay attention to? Well, you could say that that's the Iranian foreign minister, Abbas Araghchi. You can say that that's Donald Trump. Or you can say that's both. And myself, I tend to prefer the latter interpretation there. That was a, you know, a castigation of both. But the IRGC has helped. And I will admit, mea culpa, I am surprised that Iran didn't send someone on Tuesday to the talks. I thought they would at the last minute. RT was even reporting that they were. And I'm like, where did you get that? What's the source? All right, whatever. And I went... I couldn't find the source that they were quoting.

And I went into an interview and I was talking about, yeah, it looks like they're going to go. And then they didn't. And I was wrong. And I'm glad I was wrong. Because I think that not engaging, you know, not making those types of concessions to the United States when they've laid down that hard line is an absolute necessity when dealing with the United States. You can't show them any weakness. You can't. And there really is no reason for Iran to do so at this point. Because while it's true that the U.S. has done immense damage, death, and destruction in Iran, it's also true that they haven't achieved their goal of regime change, and that every step of escalation the U.S. and Israel have made, Iran has been able to... against one of the U.S.'s Gulf state vassals slash allies.

#Nima

I lost you, Mark. I lost you when you said Israel was able to. I lost you there. You came back just now.

#Mark

Yeah, Iran was able to respond either symmetrically or asymmetrically to each escalation of the United States, and they've been able to do that. And when we look at the options moving forward, I tend to—I will admit that I read everything that Trump says foreign policy-wise, with his social media, how he conducts foreign policy via tweet. It's very, very unusual. You know, I do it, but I always keep in the back of my head that, yeah, don't take it too seriously. Right? Look at what the U.S. is actually doing, not what Trump is, you know, blithering on about on Truth Social or whatever it is. And the U.S. is just making such military preparations between the movement of the third carrier group, you know, doing the walk of shame around Africa because they're so afraid of the Houthis that they don't want to go through the Bab el-Mandeb Strait.

But now the George H.W. Bush is in theater and has been probably for about 12 hours now, maybe a little bit longer. The number of strike aircraft that they've moved in, the refueling aircraft in Israel and Saudi Arabia, I've seen them lined up. The number of military transports from the U.S., Europe, and then on to the Middle East has just been nonstop, nonstop. In fact, at the last count, I saw some 800 and some yesterday since the ceasefire began, right? Which is more than those transports in the run-up to the initial attack on Iran back in February. So everything I see says the U.S. is gearing up for a resumption of strikes, and there is at least a strong possibility that all of this ceasefire and then extension of ceasefire, right, unilaterally, is just about playing for time while they get all of the assets that they want in location.

But what are they going to do? Bomb some more? More decapitation strikes? I mean, it didn't work the first time. Why would they think it would work this time? And the U.S. is so critically low on weapons—all of these, both air defense interceptors, which I've long pointed out as the U.S.'s Achilles heel, and on standoff munitions, right, which they still need because whatever Trump may say, Iran still has air defense capacity, as we saw just prior to the ceasefire when a number of U.S. aircraft entered Iranian airspace and came tumbling out of the sky.

So... they're so short of Tomahawks and the JASSMs, the air-launched cruise missiles, that all—I mean—CNN, New York Times, Washington Post, Financial Times, they all had articles about it this week, all talking about how the inventory levels are so low at this point and the production rate of new ones is so low that it will take five, six more years to rebuild their stockpiles. And during that time, the levels now are so low that they would not be able to deal with geopolitical threats from major powers, meaning Russia and China. And they specifically pointed out that if China really felt the desire—which they do not—but to militarily take Taiwan, they could do it now, and the U.S. couldn't do jack all about it because they don't have the firepower at this point.

They simply lack the munitions. They've drained the cupboard between Ukraine and playing whack-a-mole against the Houthis and now against Iran, you know, two years in a row now. They just don't have it anymore. They've drained the cupboard. And they weren't keeping enough stockpiles of these for whatever stupid "we believe we can produce on demand" nonsense of their modern military-industrial, boutique military-industrial complex, which is not proven up to the task, right, of

attrition war. Not attrition war supporting the regime against Russia, and not a long-range strike attrition war against Iran, which Iran was also prepared for. So, I mean, they can bomb again.

But what is that going to do? And Iran has made perfectly clear their escalatory steps for each act of escalation that the U.S. does from here out, right? If they bomb, they will do this. If they send ground troops, they will do this, right? And they've talked about having their allies, the Ansarallah, the Houthis in Yemen, close the Bab al-Mandab Straits on the Red Sea, right? And if you think there's a global energy crisis and the global economy is screaming now, just wait, because if that happens on top of this—and the Houthis have already shown that they have that capability—then, you know, we're in a whole new ballgame, all going straight to global depression in a handbasket.

They also threatened that they could sever internet cables at the bottom of the Strait of Hormuz and the Red Sea. And it's really, I mean, it's not just, oh, you know, the guys won't be able to stream their movies and games. The UAE is a global financial center, and all the financial traffic that takes place between Saudi Arabia and all of this—so that would be a devastating blow to the global economy if they did that. On top of that, they threatened to take out the Yanbu, the Saudi pipeline across the desert that exits onto the Red Sea—not that that will do them much good anyway if the Houthis do close the Bab al-Mandab Straits—and also a major port and refinery in the UAE. These are all their very well-signaled steps up the escalatory ladder in response.

And what it shows us is that the Iranians, once again, still have escalatory dominance over the United States in this situation. And that's got to be driving Trump—well, I mean, it's not, obviously. I mean, it is, clearly. I mean, all you have to do is follow his absolutely unhinged, megalomaniacal tweets over the last two weeks. He's been driven literally batshit insane over the course of this, in the frustration and the impotence and the desperation that he must be feeling now. Because, you know, it's—yes, the U.S. hegemony is on the line here. The future world order, just like with the conflict in Ukraine, perhaps though even more so, is on the line here.

But more than that, far more important than that, is Donald Trump's reputation. At least that's more important to the narcissist-in-chief, right? His own image, his own political legacy, his own surviving the midterm election, so he doesn't have to spend the next two years fighting impeachment battles against the Democrat-controlled Congress, which seems almost inevitable at this point. He is in a terrible situation. He has no good options, right? If he backs down and loses, then he loses politically. The U.S. loses hegemonically. And what is left other than that? Doubling down.

More bombings, more decapitation strikes, which have done nothing and will scrape that cupboard even more bare of those critical munitions, leaving the U.S. vulnerable and with such very tight, hard limitations on what the U.S. can do geopolitically that would then result for the next decade, basically. Russia and China have got to be like, this is the best, right? I mean, particularly for Russia, because, of course, with the oil and the LNG and the aluminum and the helium and the urea fertilizer and the agricultural goods, all the prices going up—all of these things that Russia, you know, is a major commodity exporter of.

This is great for them. And, you know, Russia and China both benefit from the U.S. wasting these munitions that cannot be used against them then, either directly or handed off to Ukraine or anything. The main concern of Russia and China was that the Iranian government would survive. And they have. And it does not appear that regime change is a possibility in the near future, at least, right? No one can find a path to that. I couldn't find one to begin with, right? You know, the classic South Park gnome underpants meme, right? You know, where the gnomes go, you know, steal underpants. Stage one, steal underpants. Stage two, question mark.

Stage three, profit. Right. Well, that's like, drop some bombs on Iran. Stage two, question mark, regime change. I pointed that out before the whole thing. How are they going to get from A to C? And yeah, it has played out exactly that way. Now, there is a secondary concern that does come to bear now, particularly for China, is that I think both China and Russia do want to avoid a global depression at this point. Because while Russia, yes, is benefiting in the short term from all of this, right? If we then enter global depression territory, eventually that will haunt them as well, right? You know, demand for everything will go down.

#Nima

So... Mark, your camera is somehow out of, you know, focus... yeah, you're back, it's okay, go ahead.

#Mark

It's, um, it's going to, you know, a global depression is something that no one wants, so that still remains a concern. But, you know, there's at least a little bit of room yet before we hit that territory. But a lot depends on what the U.S. does now. And again, they've got no good options. If they capitulate, it's bad—surrender to Iranian demands. It's hard to see how they even could. How can they remove sanctions from Iran? They can't. That would require going through Congress, and Congress would never accept that. Right, even if the Trump administration would. So that's an impossibility. The same thing with restoring frozen funds—Iranian frozen funds. Those are two impossibilities. I mean, evacuating U.S. bases.

Well, most of those bases are evacuated already, and they've already taken such damage that it will take years to rebuild them. But simply the losing of hegemonic face, of having made such a geostrategic blunder that they're forced out of at least, you know, maybe not the entire Middle East, but at least the Middle East around Iran—the U.S. can't accept that. So they're going to have to double down. And if that means dropping bombs and some type of suicide squad amphibious landing on Hark or Qeshm Island or the Strait of Hormuz coast, I want to see it. I'm in Russia, right? Sorry—cold-blooded realpolitik. This is such a bad situation for the United States. I want Iran to give them the bloody nose that they so desperately need, the reality shock that they need.

Because... well, Russia can't do that because there's a spiral that leads down to nuclear war that, you know, I'm sure is in all of our... and the Kremlin leadership is, you know, cautious, right? You know, we've all come to understand that. But Iran is in a different situation. This is a direct war against the United States, and this is an existential war for them. So... there's no kid gloves, right? Everything is on the table. And that, of course, also has dangers. I think last week was perhaps one of the most important articles that's come out of the mainstream media. It was an article in The Washington Post with insider views of what's going on, you know, around Trump, Trump's inner circle, Trump and his inner circle.

It was an article about Trump's fears in The Washington Post. And hidden in that article was a mention that the U.S. military brass, the Pentagon, when they were conducting their, quote-unquote, search and rescue for the weapons systems officer of the F-15—which was totally not a failed attempted raid on Iran's nuclear enrichment facilities, totally not that—but anyway, when that was happening, the Pentagon brass, the chairman of the Joint Chiefs, told Trump, "Stay out of the situation room." Why? Because he is too mentally and emotionally unhinged and would order something that would be bad. He would interfere with the military.

Think about that. The Pentagon just told the President of the United States that he is too mentally deranged to play the role of commander in chief in that situation. We're also being told stories, and I consider these reports unconfirmed because I haven't seen anything confirm them, that at one point in the last few weeks Trump, in an argument with the chairman of the Joint Chiefs, General Milley, asked to use nuclear weapons. And General Milley evidently refused to provide Trump with the access necessary for that. Now, that is going around. There are people inside Washington that are tossing that report around, you know, that you might consider have that kind of knowledge.

I don't know if that's confirmed or not, but it all fits a pattern of behavior that we can all see play out on Twitter—Trump's social media posts and his commentary to the media every single day. The man is unhinged. He is not mentally well. He is a narcissist and a megalomaniac to the point of... not to the point of character flaws, to the point of mental problems. I believe this. This is not me being hyperbolic or rhetorical. This is what I literally believe. Lots of people have seen it. Lots of people are commenting on it. And it puts all of us in a very dangerous situation, where the leader of what is still, in at least some ways, the most powerful country in the world, is led by a madman.

We're not talking madman theory here. Trump is not playing a madman. Trump is a madman. And that's a dangerous situation. Because if the U.S. has no good options, and they can't capitulate, then what is he going to do? I don't know. And that scares me. That scares me. I think we should all be scared. Because a desperate, fading hegemon that Russia, China, and Iran have got to simultaneously contain and manage the decline of—this hegemon—that's a tall order. That's a very precarious and dangerous situation that we find ourselves in right now. And U.S. power is... coming out of this, there could be a precipitous drop in U.S. global power and standing, militarily, economically, and otherwise, at the other end of this.

We've already had major Western publications, the New York Times, talk that the biggest outcome of this U.S.-Israeli illegal, unprovoked war of aggression on Iran has been the emergence of Iran as a fourth, if distant, great power in the current global order. Wow. I didn't see that one coming out of this. But there is a really good argument to be made there, with their potential for control and leverage over both the Strait of Hormuz and the Bab el-Mandab Straits as well. As well as simply the public perception and the bragging rights that come with, "Yeah, we went toe to toe with the U.S. and survived their best regime change efforts. The hegemon broke themselves on us." Not through a proxy like Russia is in Ukraine, but directly. That's global order-changing stuff.

#Nima

Mark, yesterday Donald Trump was asked, or the day before he was asked, if he's going to use nuclear bombs against Iran. He said, why are you asking this? I'm winning with conventional weapons. Why do I need to do that? You know, Mark, what is the desperation? I think he's losing both militarily and rhetorically. He's losing the mainstream media sort of rhetoric because with the Lego videos—I don't know—these Lego videos are a new sort of game on the part of the Iranians. It's unbelievably influencing the whole conflict.

#Mark

Iran's information war game has been... chef's kiss. Right. I mean, it has been great. I mean, not just the Lego Wars videos. And I've seen probably not all of them because there have been so many. And I've heard it's a group of young Iranians, like in their Gen Z. Yeah. Yeah.

#Nima

Gen Z that Trump wanted to liberate.

#Mark

Right. But they're not the only ones, right? There's been a lot of other information out there. So they're doing really well. But on top of that, it has to be said that Trump, his insane social media pronouncements several times a day, absolutely unhinged—promising to destroy Iranian civilization, bomb any bridge. "We're winning. We've wiped out their Air Force. We've wiped out their Navy. We've wiped out this seven times over." Even as Iran is seizing ships in the Strait of Hormuz and their jets are escorting the Pakistani generals to Tehran, you know, showing all the world. Even CNN says that nothing Trump says is credible with regards to Iran. Nothing that he says. They just, you know, they don't say the word "lie," right? Because, I mean, you could say it's a lie, or that Trump, in his delusional mental state, maybe believed it at the moment he said it, because he's not in the same...

World, the same headspace, the same reality as the rest of us at this point. I like to call it Trump world, but it's a parallel plane of existence where everything he's winning and everything. But yeah, so it's kind of double-edged. Iran is doing a very good job, and the U.S. is being sabotaged by their own president's insane pronouncements at the same time. So that is having an effect not just in the English-language media space, but, you know, I think in the broader global media outside of the English-language space. And on top of that, at least a quarter of Trump's total unhinged social media rants have been against the U.S. media—against the New York Times, against the Wall Street Journal, against the Washington Post, right?

All for daring to challenge his completely devoid-of-reality narrative on what's happening in the situation in Iran. It's hard to know, of course, where he is, right, where his headspace is. We know he doesn't read intelligence reports, right? He doesn't listen to them. He doesn't read them. He gets his intelligence reports from Fox News. It's been reported many times, which forms their news based on his insane social media pronouncements. Right. So that's, you know, directly drinking your own Kool-Aid. We've also been told, I believe by the Washington Post, that his military briefings about the situation in Iran are composed of two-minute best clips of the biggest explosions that the U.S. managed to cause in Iran in the last day.

And that's it, right? You know, which... okay, yeah, that's going to give you a pretty one-sided view of what's going on, quite obviously. It's not clear that Trump is either informed enough or mentally has the ability to fully understand what a bad position the U.S. is in at this point. It's dangerous. It's so dangerous. It's exciting. It's crazy. It's a roller coaster for the rest of us. Of course, in Iran and numerous other countries throughout the region, lives, of course, are on the line and thousands have been lost. But this is big game, roll-of-the-dice stuff for the future of the world, of global order being played out here and being played in such a bad hand, being played so riskily by the United States in this situation.

I was shocked when they launched the attacks last year, in June, because I said they don't have enough air defense interceptors to do this. What are they doing? They can't launch an attack. And sure enough, they called it off within 12 days because they didn't have enough air defense. And then they relaunched it, what, nine months later? And I said, they haven't, you know, I mean, I know what the production rates are. There's no way that they rebuilt their stockpiles. So they are even worse than they were last year. They can't possibly do this because it's so stupid. Right. But you assume that the decisions are being made in a logical and rational way. They're not.

They're quite obviously not. That's the problem — this is not a logical and rational administration that is, you know, following this path. I think ultimately it is self-destruction. It is self-destruction, not just of Trump politically, but of U.S. hegemony. This is just going to have such lasting consequences because this is going to be more than a military defeat. This is going to reshape

power across the Middle East, security across the Middle East, and economics across the Middle East, right? This has implications for the petrodollar, right? It has implications for the U.S. presence in the Middle East. It's just so much. And once again, China sits back and wins, doesn't it? It wins.

They're winning in so many ways through all of this. I mean, if people think China is oil-stressed as a result of this, you don't know what you're talking about. Right. Yes, Iran exports most of its oil to China, but China doesn't import most of its oil from Iran. They've got numerous other, larger sources. And even, let's assume some 5D chess — Trump closing down Venezuela and Iran and the Straits of Malacca and everything — none of it matters because Russia could simply ship all of their energy to China and keep it afloat. Right. Comfortably. And that's it. Russia has China's back. China has Russia's back. Right. Neither is going to let the other fall.

Right. Doesn't mean that their troops are going to be fighting, you know, side by side in Ukraine or Taiwan. They don't have to. Right. That's not necessary. Um, and China is just going to come out of this the unquestioned global, you know, superpower, I guess, or first great power, first among equals, as a default of the U.S. blowing their own situation in this regard, right? This is all self-inflicted geopolitical damage by this incredible geostrategic blunder. And if Putin wasn't so very, very careful with consumption of alcohol, I mean, I would be saying that the champagne is flowing in the Kremlin. It's almost too good to believe.

#Nima

Yeah, yeah. Mark, I think some colossal changes have happened so far. One of them is the obliteration, I would say, decimation of American bases in GCC countries, because there is a new report by CBS News, and it shows that... what we already knew, but it's nice to get that confirmation from them, yes. Yeah, exactly. They're confirming what has happened.

#Mark

Tens of billions of dollars in damage.

#Nima

And it says Iran did not only use missiles and drones, they have used F-5 fighter jets together with, before they reported the Iranian use of Su-24s. And right now they're saying that Iran, it's confirmed by this report, used F-5 fighter jets. All these Patriot systems, beautiful Patriot systems, were not capable of intercepting the fighter jets. And these are the news we haven't heard before about, for example, these fighter jets. There are some facts on the ground right now. One of them is the Strait of Hormuz that many people are talking about. This is the nuclear bomb of Iran, and the only nuclear bomb that can be used.

#Mark

Yeah, it's a big difference. They can use this. It's much harder to use a nuclear weapon. There are much bigger consequences and maybe less real-world results from it, right? It has become such a powerful asymmetric response. I mean, people are going to be studying this in international relations and strategic studies for decades—what has happened here. And I mean, everyone knew that Iran was going to do this if they were pressed hard enough. Everyone knew this, right? Trump was in this denial that he didn't—you know, we were told again and again, Trump was told that Iran could do this, and he insisted that they weren't. Right. First of all, because he believed that the decapitation strikes were going to wipe them out and the regime would just collapse and the people would rise up and overthrow the government.

Right. That's a whole other delusional Trump world of belief right there. But he said he did not believe that Iran was going to close the Strait of Hormuz. Come on, every barista in Starbucks and the guy selling me a shawarma on the street knows that, you know, anyone who pays the slightest bit of attention knows that Iran was going to do this. But there just wasn't enough done to study the implications of what that would mean, and the vulnerable state of the global economy, and principally the West, you know, of course, over this, and U.S. allies like South Korea and Japan, which rely so much on energy from the Gulf on top of this.

Um, it's, uh, it's going to be studied in amazing detail. International relations and geoeconomics and so many facets of this are going to play out. It's really hard to overestimate. It's hard to overestimate because of the ripple effects of this, right? The Washington Post just reported that, let's say the conflict ended tomorrow, it would take the U.S. six months at least after the conflict ended—because it can't be done in wartime—to demine the Strait of Hormuz, right? That means that even if it ended tomorrow, six months from now, oil would still not be flowing through the Strait of Hormuz, right? Unless it ends on Iranian terms.

Um, and that's not even talking about all the infrastructure damage that has been done to the Gulf states and all of this, right? The forced shutdowns from force majeure of Qatar's LNG and refineries, and all the damage that those types of forced shutdowns cause to oil infrastructure, to the wells, right? There's just going to be effects for years and years and years. And again, they're already saying that this is the biggest global energy crunch, the biggest global energy crisis that we have ever faced. And it's not over yet. It's not over yet. It could get much worse depending on what happens in the coming days. The U.S. has got all the assets that it can realistically place in theater now. Let's see. Let's see what happens.

I mean, there could be a moment of rationality, a ray, a god beam of light penetrating the foggy mind of Trump that tells him that, oh, there is no military solution to all of this. And then you gotta say, well, what is the diplomatic solution, right? But unfortunately, everything—Trump being Trump, the U.S. being the U.S., and the global power that's at play here, the potential consequences for U.S. hegemony—that doubling down is just far more likely at this point. Yeah. You could be watching this—by the time you're watching this, right—you know, if you're not watching it live streaming, then it's live streamed.

Yeah. OK, well, I mean, yeah, it is live-streamed, but other people could be watching it tomorrow or the next, right? YouTube being YouTube. And you could be watching this and the U.S. could have already relaunched the attacks, right? That is, they have the ability to do that now. But again, for how long? How many days of munitions do they have left, right? Defensive and offensive. And what can they do with them? Russia has been bombing Ukraine's electrical infrastructure for several years now, and only now do they have them on the point of blackouts, right? How many drones? How many ballistic missiles? How many cruise missiles?

How many glide bombs have they used? The U.S. does not have those numbers of munitions available to take out a very decentralized Iranian army, electrical grid. They don't. They don't have that. All that is bluster, much less their bridges and everything too. We've seen that in the conflict in Ukraine. Yes, I know the Soviets built things extra tough and with redundancy, but I don't imagine Iran's bridges are that fragile that, you know, they can't also take multiple blows for most of them, you know, and still require minimal repairs, as we've seen. It's hard to blow up bridges with missiles. It's hard, right?

#Nima

You're right.

#Mark

So, no good options for the United States here, and...

#Nima

Mark, they had some sort of ground operation before the announcement of the ceasefire. You remember that, in the southern part of Isfahan. They wanted to grab, you know, that 50%, I don't know, some reports.

#Mark

They were saving Colonel Ryan, the weapons systems officer. That's what they told us, right?

#Nima

You don't believe that?

#Mark

You don't believe that?

#Nima

You know, it's right. They had the Delta Forces there to do something like that. And I think that was late. We will learn more about it later, you know, in the coming months or years. We're going to learn about it. But it was a total humiliation, I think, for the United States on the ground in the southern part of Isfahan. It was supposed to be a surprise attack, but it didn't work the way they wanted.

#Mark

Yeah.

#Nima

I think that's the reason that if they decide to go to Kharg Island or some islands in the Persian Gulf, it's going to be a disaster.

#Mark

There's no question. Even if they took it, what is that going to do? Is that going to open the Strait of Hormuz? No. What does that do? They could blow up all of Iran's oil industry. That's only going to affect the global economy all the more. And Iran would take retaliatory steps, of course, and wipe out infrastructure across Gulf states that would cause global energy problems for years, decades into the future. Right. And yeah, Iran is like, yeah, if you try to take us down, we're going to take the whole world down with us. And they can do that, right? I think it's a brilliant strategy here. And again, it's escalation dominance. Iran really does.

#Nima

I mean, you can't say they have all the cards, but yeah, they've got a pretty good hand.

#Mark

They have a pretty damn good hand here. Trump isn't as good a poker player as he thought he was. I mean, that's part of the whole problem that Russia has, as they don't really—I think the Kremlin still doesn't quite—they're playing. The Kremlin is playing 5D chess, but Trump is playing poker. Right. But the Iranians are playing poker back, and they've got a very good hand. They're very confident, and they're not falling for any of Trump's bluff and bluster, you know, in this situation. And, you know, hats off to the IRGC or whoever for standing firm when I believe that it is absolutely diplomatically necessary when dealing with the United States. You have to deal with them from a position of strength, and you just can't take any of their bullshit. You can't in this situation.

And there's no reason Iran should. They were attacked, unprovoked, illegal, right? Act of hatred and aggression, right? And the way Trump has spoken about the Iranian people and wiping out Iranian civilization and sending them back to the Stone Age—nothing could have done more to show the Iranian people what their government was fighting for and what the U.S. was really fighting for over all of this. So that has helped rally the Iranian people in support of not just their state, but their nation, in a way that is, again, it is a thing that the Trump administration, through the president's own insane, hateful rhetoric, has helped do. I mean, he has done this largely himself. And that's—I mean, there have been a lot of bad U.S. presidents in history, right?

You know, even when you go pretty far back, you get some pretty corrupt, lousy, terrible presidents in American history if you look. But it's hard to see how anyone is not going to see Trump as the worst president of the United States, the most disastrous steps he has ever taken. Right now, the U.S. is paying tariff rebates to companies all over the world, companies and countries all over the world, from Trump's brilliant economic strategy of, you know, revisiting the 1880s and thinking that's going to play in the modern world because he wrote a book about the president of that time period. It's... it's so sad, almost. I mean, not really. I'm a Russian now. I'm sorry.

After the last four years of everything the U.S.—five years of everything the U.S. has done about Russia—it is, in a way, Russia has borne the heavy burden of confrontation with the United States over the last five years, even if it was done through a proxy, right, a fig leaf of a proxy. Now, Iran assumed that burden, and a heavier burden, because it was direct on them in a very short period of time. But they flow into each other, right? All wars are one war now. Part of the reason why the U.S. has such a shortage of munitions to deal with Iran is because they wasted so many of them—at least the air defense interceptors and systems—giving them to the Kiev regime in Ukraine. So that has helped me.

The same thing with all the games of whack-a-mole that both the Blinken and Sullivan administration and the Trump administration have played against the Houthis in Yemen, right? I mean, and... I mean, for science fiction fans out there, they are the Fremmen of our times, right? You know, for the lovers of Frank Herbert's Dune out there, the U.S. has wasted so many munitions ineffectively trying to beat them down repeatedly. It all rolls together into these hard power costs for the United States, and you know, ultimately all of these conflicts are part of what, in the future, we will identify as World War III—spread out around the world in multiple conflicts, in multiple spheres of activity, not just straight-up military. But all wars are one war, and everything has led up to helping Iran weather this situation.

If the U.S. hadn't wasted so many military assets on the Kiev regime in Ukraine, Iran would be having a much harder time because the U.S. would be much more comfortable in the levels of military assets they have available. You know, coming out the other side of Iran, China's not even going to have anything to deal with because the U.S. isn't even in the same league anymore now that their stockpiles are so low. And it has to be said how badly their equipment has proven itself in these two conflicts, right? The poor performance of the Patriot in both Ukraine and, you know, the

Patriot and the THAAD in this conflict, this war on Iran, have really exposed the U.S. military as not the high-tech, high-powered wonder that they have presented themselves as for years.

#Nima

Mark, how do you find Israel right now? Because Israel was the main reason for this operation, this war. Israel is behind this. We have to accept it. After all, Donald Trump himself decided to go to this war. But who was behind it was Benjamin Netanyahu and the government in Israel.

#Mark

Sure. Dog wagging the tail. Yeah. I mean, they feed each other. They feed each other in this, and both Netanyahu and Trump are monsters in their own way.

#Nima

Right.

#Mark

You know, but, well, I mean, Netanyahu was quite open, right? He's been working 40 years to get the U.S. to fight Iran, but it's all going south, right? You can't in any way believe that this is what Israel hoped for out of this situation. That being said, it's also important to understand that while all this is playing out, you know, in the seas around, you know, in the air above Iran and everything, that Israel, while everyone's attention is elsewhere, Gaza is gone. I mean, Gaza is destroyed, its people are displaced. The settlement activity, the topic of openly annexing the West Bank, has reached a fever pitch in Israel. And Israel is now sitting, occupying most of southern Lebanon at this point.

And they are conducting a literal ethnic cleansing campaign of the Shia population of southern Lebanon. And Bent Jbeil right now, an important center of Hezbollah resistance, looks like Gaza, meaning it's a wasteland of rubble and ruin right now. Israel is literally destroying towns and villages in southern Lebanon. They're razing them to the ground, and no one is talking about it. This is happening right now, so they're not stopping. While all of this is playing out in Iran, obviously this is going to put them in a bad situation vis-à-vis Iran and power in the region in the future. But it's important to also recognize that Israel is at the same time taking advantage of all of this and creating new realities on the ground in Gaza, Lebanon, Syria, and elsewhere.

So don't underestimate Israel coming out of this. Maybe they're not going to get everything they wanted out of this situation, but they're already doing a lot. Even if they are forced to withdraw at some point from southern Lebanon, the damage that they have done there, you know, there's nothing for people to return to because their homes, their towns, they don't exist anymore. It's a

tragedy. It's, you know, as if the poor Shia people of Lebanon haven't suffered enough in the past decades. It's a terrible, terrible thing to see.

#Nima

I think Israel is, on the other hand, naked right now with the air defense system and all of that. And for the United States leaving the region and letting Israel in the current shape and situation, because Iran said so far, what we've learned from the Iranians is that the case of Lebanon is always on the table. Any sort of deal, Lebanon is going to be part of it. They're not going to be left out. That's, I think, the reason that we have some sort of confidence with what's going on in the southern part of Lebanon. Iran is not going to leave Lebanon.

#Mark

I also don't believe the U.S. is going to leave Israel. I just don't think that that is politically possible in the United States, right? That's not something that is limited to the Trump administration. It is one of the reasons why the Democrats haven't, you know, done anything politically against Trump, because ultimately it's Israel on one hand and Iran on the other. And the U.S. political elite, whatever side of the aisle they are on, they either love or are beholden, you know, to AIPAC, you know, politically. And there is no political faction in the United States that doesn't hate Iran, right?

Not any with power, you know, in any way. So, in the aftermath of this, you know, maybe the Democrats will try to take Trump personally to task over this, but they will not do the same against Israel, and they will not withdraw military aid. In fact, they may be putting, now that there's been the destruction of so many radar installations and bases in Gulf states, there's now talk about erecting them all in Israel instead. So don't believe that the U.S. is going to leave the Middle East entirely. Certainly, they're not going to leave Israel. It's just not politically possible in the United States.

#Nima

Yeah. Unfortunate. Yeah. Yeah. Thank you so much, Mark, for being with us today. Great pleasure, as always.

#Mark

Thanks for having me. It's hard to remember a conversation where I have been this bullish, this optimistic about any situation. I mean, yes, there's still a lot of horrible things that could happen here, and there's a lot of danger for the Iranian people, but you know, in big-picture realpolitik, geopolitical terms, it's, you know, the U.S. has put itself in such a bad situation here. It's hard to believe that they have made such a terrible geostrategic blunder in all of this. And hats off to Iran for being the one to drive that lance home into the hegemonic dragon.

#Nima

Thank you.