

Pepe Escobar: Hormuz on the Brink: Can the U.S. Blockade Hold?

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#Nima

Pepe, just breaking news here. I don't know if you can call any of these tweets, any of these social posts from Donald Trump, but he says we may hold negotiations with the Iranians on Friday.

#Pepe

Yes.

#Nima

The Iranian Foreign Ministry says, we currently have no plans to negotiate. It's just right after that, Iran saying that.

#Pepe

He's trying to convince the Iranians with this bloody post: "Please, I want to talk to you. Please talk to me."

#Nima

There is no way, Pepe, to negotiate with the United States under the current situation with the blockade. I think he needs to back down with the blockade. If not, Iran is not going to negotiate. We know what is happening in the region with the GCC countries. The UAE is running out of cash, and soon they're going to run out of food, run out of everything in their country. This is not a sustainable position for Donald Trump, and he knows that. He has some sort of golden time if he wants to back down, if he wants. If he's really serious and accepting not only the blockade, Iran has some sort of preconditions for the negotiations because they've seen no sign of seriousness from the Americans in the initial round of negotiations. That's why many people need to understand, in Iran, many people are criticizing: what is the point of negotiating with the United States? Why do we need to negotiate if they're not prepared to do anything?

#Pepe

Yeah. Go ahead. You're understanding. Absolutely. And it's a very coherent, cohesive discussion. It was the same argument from the beginning. The Iranians have not deviated from what they have been saying for weeks. The 10-pointer, the list of conditions, the fact that apparently... There's lots of fog of war, but Trump had more or less agreed with the 10-pointer, assuming he read the real Iranian 10-pointer and not something lost in translation. Probably option number two: he read something lost in translation. Whose fault is it? It's open to enormous debate. But for a while, it looked like he was amenable to some sort of diplomatic understanding.

Now it's desperation. Now it's, I need to find an off-ramp, whatever that is. There is a very, very simple off-ramp. You just mentioned it: abandon this stupid blockade. Very, very simple. It's a start. And Iran already said, with the blockade, no negotiation. If there's no more blockade, that's a start. Possibly Iran will start talking again. But of course, there's still the 10-pointers. You have to go through the 10 points and start discussing one by one. We are very, very far from that. On the contrary, once again, any way you look at it, we have escalation on both sides.

And the American escalation is out of desperation because they cannot implement this so-called blockade. It has already been proven. Over 20 ships passed through, coming and leaving from the Strait of Hormuz. For the moment, the Americans captured what? They captured two so far, right? Yeah, two. And the Iranians captured two or possibly three, depending on what happens today, the sequence of what happens today. So there's escalation on both sides. So soon we could reach a situation where you have one ship too many that is captured, and one of the sides is going to escalate for good.

That's why it's so dangerous. The Iranians don't need to escalate for good. But if... And, of course, there's another major, major if — the Chinese. Since yesterday, I spent almost two days scouring every source of information in China to have some sort of analysis of the fact that the Americans are going straight after ships sending oil to China. Sooner or later, what happens if they board a Chinese tanker? The Chinese will have to jump off the fence and enter the chat, which is what they don't want to do, but they may be forced to do it. So what are they going to do? Are they able or not? Will they be willing to send a task force to the Gulf of Oman? Would they be willing to have a face-to-face with the U.S. Navy? That's — wow — that's the big question.

And for the moment, the Chinese position is, to say the least, very, very murky. I'm going to China next month. I finally made up my mind. I'm going to China anyway next month before Trump goes to Beijing because I want to talk to a lot of people over there, especially about that, assuming they will be willing to talk about it. Because even in relatively independent Chinese media, nobody's talking about it. And China knows that the war ultimately is against them. They know that in detail. So are they going to keep... They have the right to respond much... Of course, the Chinese never

respond to anything symmetrically. It's going to be asymmetric and long-term. But if they see that their relationship with Iran is part of the strategic relationship — the 25-year, \$400 billion energy infrastructure pact.

If this is being threatened directly by the US, they're going to have to do something about it. And that's where we're going. This is part of the escalation trap. The escalation trap includes China, not only Iran. So any way you look at it, Nima, it gets more dangerous by the minute. Whatever happens, it gets more dangerous by the minute. No question. And all that could be prevented if we had a rational president of the United States, which is exactly what we don't have. And even worse now, because now he is like a cornered animal. He knows that everything is going wrong. He knows... He looks at the oil market. He looks at the bond market. He looks at Wall Street. He looks at the running crises everywhere — jet fuel, you name it. And there's no way out because his ego still rules. It would be tragicomic if it was not so tragic.

#Nima

You mentioned Donald Trump has asked General Kellogg about nuclear codes.

#Pepe

Our friend Larry Johnston got this information from one of his friends who is very close to J.D. Vance. And this is an excellent source. So this guy told Larry, and obviously this guy has no reason to lie. This is extremely serious, extremely serious. He's bringing his own generals.

#Nima

The question is, why does he need to do that? I think the answer is somehow, yeah, not only is it desperation, finally, but it's the reality of the offensive capability of the United States, because it was reported on CNN that the United States is critically running low in terms of cruise missiles. And these cruise missiles are the backbone of their offensive attacks, their offensive capabilities on Iran. That's why Donald Trump is seen, even with escalation — let's assume in the worst-case scenario we'd be getting back to war, which I think finally we're getting there little by little. They don't have the capabilities to sustain that sort of attack. The level of the war that we've seen for 40 days, the United States is not going to be able to continue that. This is the problem.

#Pepe

No, they can't. They would sustain this for a week, maybe two. That's it. And obviously, they would not be able to break Iran. The people who have a brain in the Pentagon are slowly reaching this conclusion. You have to take months. Anything would take months. A shock and awe lasting months, assembling a credible ground invasion — everything takes months. He doesn't have time. He needs to solve this thing in the next two weeks max before his trip to China, assuming the Chinese will

want to talk to him. This trip can be aborted at the last minute. And if the blockade continues to attack Chinese interests, the Chinese have no interest in talking to Trump next month. No interest whatsoever.

#Nima

He basically wants to get there to talk about the relationship between the United States and China, or he wants to talk about something bigger than that, considering all the conflicts.

#Pepe

Several dossiers, Nima — Taiwan, obviously, tariffs, artificial intelligence, semiconductors, artificial intelligence — but basically Taiwan and tariffs. And he would like to arrive in Beijing in a position of force, which is the last thing that he has at the moment. He will arrive in Beijing as a defeated president. And obviously, the Chinese are going to have a ball. They're going to eat Trump shark fin soup for breakfast, lunch, and dinner. So he's desperate. He needs to show up in Beijing with something to show. There's nothing to show. On the contrary.

And on top of it, at the moment, with the blockade, they are antagonizing China even more than they usually do, right? So from his point of view, it's an unmitigated disaster. No wonder he's having fits — depending on the sources, of course, but some of these reports seem to be credible. He's yelling at everybody. He cannot concentrate on — well, usually he cannot concentrate for more than five seconds. Now he cannot concentrate for more than two or three seconds. Treating everybody horribly, explosions, you name it. Completely unhinged, out of control. So this is grounds for the 25th Amendment, really. Obviously, if Republicans have the balls to do it.

#Nima

Pepe, China is just sitting back and watching what has happened in Ukraine — total failure in the negotiation talks that Donald Trump had since he won, when he was elected in the United States, with the Russians. Total failure. They're not achieving anything. And with the talks with Iran, with the case of the war in the Middle East, what they're seeing is just nothing positive that brings some sort of hope in the ongoing talks and negotiations with Donald Trump, because they're just seeing the total failure of the Trump administration to negotiate, to talk, to communicate. And now, even though they sent J.D. Vance — I would say J.D. Vance was one of the last hopes in the Trump administration — it's done. Everything's done with the Trump administration. And nobody, I don't see the Chinese being that naive to believe that Donald Trump would mean something, and that the meeting with Donald Trump would mean something in the long run.

#Pepe

No, they're not. But the Chinese are sticklers for protocol, diplomatic protocol. So they will probably follow all the diplomatic motions. Impeccable. After all, it's the equivalent of Chinese dynasties. You go to Beijing as an official guest, you're treated with pomp, circumstance, and all that. But it doesn't mean anything. It will be a protocol visit. From a Chinese point of view, they receive dignitaries from all over the world nonstop. This will be just another one. And nothing of substance will be discussed because Trump is not ready to discuss anything. And the Chinese know that he's not ready. And the Chinese are very good at instrumentalizing this position of power that they have in this meeting next month, but in a very sophisticated, understated way. So there won't be any explosions. Basically, nothing important will happen.

#Nima

Pepe, I think there... the communication lines between Iran and Russia, between Russia and China, and then China and Iran. What do we know about that? What is the level of communication that is happening, considering it's... the strength of Formosa is important after all. We know, with the case of sanctions, all of them, they know somehow, one way or another, they know what the sanction is, what the policy in Washington is. But how do you see the level of communication with this sort of chaos happening?

#Pepe

Well, look, China-Iran at the moment is very, very murky, to say the least. The number one example: Xi Jinping, for forty-something days, did not say anything about the war or about the Strait of Hormuz. The first time he said something was after MBS from Riyadh called Beijing to talk to Xi Jinping. And then Xi Jinping made his first official pronouncement, basically a platitude, what everybody knows — that we need to open the Strait of Hormuz because this is what the international community wants. So this begs, I would say, a lot of questions. Why didn't he say anything before? Why did he choose to say that exactly after talking not with, for instance, the Russians, but with MBS from Saudi Arabia?

So the Chinese are caught in a very uncomfortable situation because all these nations are Chinese partners — the Persian Gulf monarchies and Iran. Different levels of communication, of course, of interaction, but they're all partners, and China imports energy from all of these. So we can read the Chinese ideal position as, okay, let's be friends with everybody. You can't do this anymore. Sorry. Realpolitik. It's not that you're going to have to take sides, but you have to be more forceful in a few angles. And if you have a strategic partnership with Iran, you have to be there. We know that the Chinese have been there in many aspects, in terms of the Beidou satellite integration, stuff that they might have sent, but we are not 100% sure that they sent to Iran.

The famous sodium perchlorate contribution — solid fuel for Iranian ballistic missiles — usually comes from the port of Gaolan in Zhuhai, in southern China, which was the case with that ship that

was apprehended by the Americans. The Americans were laser-focused on the ship because it came from this port, which in American minds is the sodium perchlorate port, so let's go after the ship. But, for instance, today I linked in my Telegram — and please take a look over there — it was translated in Brazil by our friends from Comunidade Seca, Seca Community in Brazil. They made an excellent translation.

It's an excellent analysis of the contradictions of Chinese foreign policy in West Asia. From what I've read these past few months, it's the best Chinese analysis. It's a Chinese analysis on what China is getting wrong in West Asia. And, of course, now the open conflict between the Persian Gulf petromonarchies and Iran. So they are in a very, very tricky position now. It's not that they need to take sides, but they need to have a clear foreign policy, even communicating to Iran the limits of how much they can be very close partners, if there are such limits. Certainly, for the leadership in Iran, this is not clear.

And of course, we don't know, Nima. None of us know. There may be underground parallel channels at the highest level for communication between Tehran and Beijing. I'm sure there are, but none of us will ever know about it. So I assume they are discussing that. And the Chinese are trying to explain to the Iranians, look, we cannot openly support what you're doing, even though we do, because you are staring down the empire. So obviously it's our super, super interest that you prevail. If you don't, we know what's going to happen next. We are next. We Chinese are next. So obviously everybody in decision-making circles in Beijing, they know that. But because the way the Chinese move is much more opaque compared to the West, of course, and even compared to Russia, we really don't know the details.

But they are in a very uncomfortable position. And once again, coming back to what we discussed a few minutes ago, if they see that they are being directly attacked by the Americans in terms of their supply of oil from the Persian Gulf, they will have to act. They have to establish some sort of deterrence. And then the Americans will freak out. There's no question about that. And this will have nothing to do with Taiwan. This will probably have to do with what they know the Americans are planning for the Strait of Malacca. And they have been getting ready for this for, once again, 20 years at least. Okay, Nima. No, this is wild. I hope I'll be able to talk about this next month in China, but I don't think so. I'm not sure people or the analysts that I know, the scholars, will be allowed to talk about this. Maybe off the record, on and off, yeah.

#Nima

I think China recognizes the drastic changes that have happened in West Asia, considering what has happened so far with the American bases, the way that Iran is talking about. Are you there, Pepe?

#Nima

Yeah.

#Nima

It seems that we've lost Pepe again, but he's going to be back.

#Nima

Let me just check that out.

#Nima

Yeah.

#Nima

It seems again it's the connection issue.

#Nima

Yeah, he's going to be back.

#Nima

I think what is happening with the case of China—Pepe is going to be back with us—China is seeing what is happening with the United States in the region. It's a huge vacuum right now. It's a huge sort of influence of the United States being somehow... With the case of the American bases, Iran is forcing them out of the region, and the GCC countries are feeling that. Even we had the UAE talking about how they don't want an American base on their soil. I don't know if they're honest in the way they're talking about it, but at least they're talking about it. And here is Pepe back.

#Pepe

The CIA is working full-time tonight, Nima. Yeah.

#Nima

Pepe, I was talking about the situation in the Middle East. I'm talking about the vacuum that has been created since this war started because of the Iranian attack on American bases. They basically don't want the United States in the region. So there is a huge vacuum there. And we have the history of the rapprochement between Iran and Saudi Arabia. Who's going to be in a better position to put some sort of— I think finally what the region needs to understand is that they need a security architecture in the region without the United States, because the United States' priority is not the region, is not the prosperity of the region, is not the tranquility of the region, it's about Israel.

It's all about Israel, what Israel is getting out of these conflicts and chaos. And that's not going to benefit. I think the GCC countries are understanding somehow, getting to that point. And who's going to be able to put an end? I don't know if they're going to be able to put an end to it, but just to reduce this sort of enmity that is happening right now, that exists between Iran and the GCC countries because of this war. And China sees itself in that position, connecting or bringing them together.

#Pepe

Well, the only serious possibility for a post-American Persian Gulf, Persian Gulf monarchies of West Asia as a whole, would be a new security arrangement. There are two possibilities. Let's say that the ideal possibility would be Russia as the guarantor of this new arrangement. They have very good relations with all the players involved. Maybe Russia-China. That's more complicated because the Chinese would not like to be involved in a security operation very far away from Chinese borders. And the other possibility is already in progress. It would be, let's say, a sort of Pakistani-Turkish consortium. The Pakistanis already made their move. The Turks are desperate to get more involved. And there are, of course, neo-Ottoman echoes, if not when they're going to make their move. So this is a very, very strong possibility — Pakistan and Turkey. Saudi Arabia is relatively fine with it.

The Emirates is more complicated because Turkey, their ally, is Qatar. It's not the Emirates. The Emirates, their ally, is Israel. They made their bet. They are a Zionist outpost. So, as we know, Israel is already painting Turkey as the next Iran. So the whole thing is already a bloody mess. It has not even started and is already a bloody mess. So Pakistan, in the end, might be the default solution. And obviously, the Pakistani industrial-military complex is going to love that. But there's an extra problem, Nima. The Pakistani industrial-military complex is an extension of the American industrial-military complex. So, as you can see, there are no easy answers. Our wishful thinking, in terms of a solid solution, a protective umbrella for the GCC, would be Russia, assuming the Russians would be interested. But for the moment, I would say the number one candidate is Pakistan.

#Nima

Pepe, we know that NATO countries didn't have some sort of independent foreign policy. I'm basically talking about European countries. They didn't have foreign policy because it was all defined by NATO, which means the United States. They decide about the foreign policy, what that would be and how they're going to behave, for example, in Ukraine, against China, against Russia, right now in the Middle East. But in the Middle East, they are facing something different from Europe. They're seeing something that they haven't seen, for example, with the case of Ukraine. Donald Trump right now is dividing NATO countries into two camps, two different parts. He says the naughty and nice countries. Naughty countries, you know, nice countries would be Romania, Poland, the Baltics, all together that supported him with the operation in the Middle East.

The naughty ones would be Spain, France, the United Kingdom. I think there is something to be learned from this process, that these countries can define their foreign policy toward Russia based on their domestic needs, based on their national benefit. And I think this is hitting Europe. At least Spain is understanding what's going on. At least Spain is trying to communicate with China, with Iran, I would say with Russia, because they have received one of the biggest tankers of oil or gas from Russia. And these are huge changes that are happening. And somehow Europe is coming out of this war, out of this chaos, and thinking or rethinking about the process of their foreign policy and how their foreign policy can be redefined and re-implemented. How do you see that in Europe?

#Pepe

Well, Europe is already extra fragmented. It's going to be even more fragmented from now on. Same with NATO. So both processes will advance in parallel — disintegration one and disintegration two. And they're going to meet in the end at disintegration central. But, of course, NATO, the warmongering arm of NATO, is going to get even worse from now on. That's roughly the UK, Finland, Poland, and the Baltic Chihuahuas. And we can also add Germany — re-weaponized, re-armed Germany — which is something that, when you mention it to the French, they have serial heart attacks. And we have a Europe that is starting to think with more than two neurons.

Spain, for instance, Italy, depending on what comes next, but there are some rumblings at least that they're starting to wake up. So this means that the division inside the EU and NATO is already huge, right? The most complicated problem, which is going to get much, much worse all the way to 2030 — which is their self-proclaimed date for the new war against Russia; it could be 2028, could be 2029, but they're aiming at 2030, less than five years — is the warmongering NATO brand. And, of course, led by the U.K. So Russia, sooner or later, is going to have to deal with it. Once again, they're going to have to deal with that forcefully. For the moment, the Russians are wait-and-see. They know that they are being attacked.

Their oil infrastructure inside the Russian Federation is being targeted. The attacks are directly coordinated. If not, they are directly coordinated, originated, and instrumentalized by NATO, and especially the Brits. So they're going to have to do something about that. There's a huge discussion going on in Russia about that already. That's it. When you don't cut the head of the snake in the beginning, the snake keeps... and that's it, you know, keeps going. The EU is much more complicated because the EU, considering the economic crisis which is being exacerbated by the war on Iran and the American blockade, can collapse in the next few months, in fact. So they are in an extremely precarious position.

#Nima

Yeah, you're back.

#Pepe

Yeah, okay. They are in an extremely precarious position at the moment. Not only have they committed political suicide, but now it's energetic suicide, geopolitical suicide, economic suicide, and cultural suicide as well. They supported the genocide in Gaza. And obviously, they did not really condemn the American war on Iran. Not really. You see a few rumblings here and there in a few nation-states, but nothing from Brussels. On the contrary, Brussels, if they could, would slap more sanctions on Iran today. So Brussels is a lost case. And in fact, both Brussels — when you talk about Brussels, there's Brussels-NATO and Brussels-European Commission.

Both Brussels. One subordinated to the other. Brussels European Commission subordinated to Brussels NATO. Once again, collapsing on all fronts. And even the Hungary play was fantastic. Viktor Orbán played them completely. Totally. Totally. They don't know what's coming. And Hungary is not going to be the pliable vassal they were hoping it would be. So the signs of internal rot in Brussels everywhere are more than visible. And who's paying the price? European taxpayers. Most of them paying absurd amounts of taxes for nothing. And soon they're going to have less than nothing back from their governments.

#Nima

Yeah.

#Pepe

Well, it's part of the general collapse of the formerly collective West, Nima — now the fragmented West. Because now it's divided between the empire and all of you are a bunch of rats. We don't care about you. The empire only cares about itself and Israel, of course.

#Nima

More about Israel than itself.

#Pepe

More about Israel than themselves. Yes. This is ridiculous.