

Mark Sleboda: How Iran Crisis Hands Victory to Russia & China

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#Nima

This current situation, it's somehow, you 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've learned Donald Trump is sending messages — Jared Kushner and Steve Witkoff too. It's all, you know, it came out of nowhere.

It wasn't planned because Iran didn't plan to talk or 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, the Iranian 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 this sort of situation, you know, 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 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 position, 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, Iran had promised never to block it again, 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, right? 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, right? 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, right? It is not being conducted. All right.

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 Kepler 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 they 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, right, is skirt the coastline of Iran, you know, come out of an Iranian port, or, you know, 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. 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. The 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 different. The U.S. is so concerned with their image — the image of, you know, the hegemon, 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 second part — which the U.S. insisted on — 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 hegemony is about power. And if 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.

Yeah. 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. That's basically what they said. 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 term, 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 Ayatollah Mujtaba Khamenei, you know, the Supreme Leader, is. Where is he? Well, is he in serious medical condition? Is he disfigured as Pete Hicks? You know, I mean, all of that. You know, we don't know his condition. We don't know. But it seems likely.

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. attack 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 seem to forget that in the U.S., where the U.S. State Department is just another department of war. 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 are 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

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 get, 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, you know, ideological dogmatic position is that? That's just a 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 Aragchi's post 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, you know, 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 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, um, I mean, it was said pretty much like that. I mean, it was in English for, you know, for the international captains, right, to understand, you know, lingua franca and everything. And I—I mean, I choked up laughing.

I was spilled—whatever I was drinking was everywhere when I heard that. And you can interpret that as, um, 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 could say that that's Donald Trump. Or you can say that's both. And myself, I tend to prefer the latter interpretation there, that 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, you know, 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, deaths, 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, Israel has been able to...

#Mark

against one of the U.S.'s Gulf state vassals/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, right, to each escalation of the United States. And they've been able to do that. And when we look at the options moving forward, right, I tend... I will admit that I read everything that Trump says foreign policy-wise with his social media, how he conducts social media via tweet. It's very unusual. I do it, but I always keep in the back of my head that, yeah, but 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 that, 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 the 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 assets — 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, yeah, there's such a shortage 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 already 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, 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 on 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 Strait 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, right, 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 Strait. And also a major port and refinery in the UAE. These are all 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, and 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 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, are major commodity exporters 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, you know, 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 they do. It does not appear that regime change is a possibility in the near future, at least. Right. No, 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, in that I think both China and Russia do

want to avoid a global depression. That's the 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?

#Nima

You know, demand for everything will go down.