

# Anthony Aguilar: Iran Strikes UAE – Fujairah on Fire, Air Defenses Active

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## #Nima

Hi, everybody. Today's Monday, May 4th, 2026, and our dear friend, our brother, Anthony Aguilar, is here with us. Welcome back, Anthony.

## #Anthony

Thank you. I appreciate the opportunity to have this discussion today. A lot is going on.

## #Nima

Yeah, a lot going on right now. Let's start with what has happened. This morning, we've learned that Iran has shot two missiles at a U.S. warship. And it was a cruiser. It's bigger than, I don't know, maybe a destroyer. It seems that it was a cruiser there trying to pass through the Strait of Hormuz, and Iran fired these two missiles that made a turn and came back. And since then, we are hearing about new attacks in the UAE, those two ports right below the Persian Gulf. It's outside of the Strait of Hormuz, in Fujairah and other ports being attacked, tankers being attacked. What is happening? Are we heading towards some sort of collapse with this? Because Iran doesn't believe that this is a ceasefire. Iran doesn't believe in a ceasefire. It's some sort of pause on their part. What they're talking about is a pause, and at any moment, you know, the war could start again. What are we witnessing right now, in your opinion?

## #Anthony

Well, I think it's important to first understand the—let's look at the ship assets, the naval assets of U.S. Central Command and components of the Fifth Fleet. So, geographically, we know that the USS Lincoln Carrier Strike Group, the USS Bush Carrier Strike Group, and the USS Tripoli Marine Expeditionary Unit Amphibious Assault Ship are all arrayed between the Gulf of Oman and the Arabian Sea, and even further down into the Indian Ocean with some of the aircraft carriers and submarines. The United States does not have any ships that are navigating or moving through the actual Strait of Hormuz routinely.

You have the Persian Gulf, you have the Gulf of Oman, and that small 12-nautical-mile navigable strip of sea, the Strait of Hormuz, connects the two. But the U.S. naval forces are on the southern side, the Gulf of Oman, which... are there Iranian ports and coastline along the Gulf of Oman? Yes, there are. Most notably, where this attack allegedly emanated from would be the coastal town of Jask, which is in the Hormozgan region of Iran, or the province. And we also know that Iran does have coastal defense systems, anti-ship missiles, land-based at the port of Jask, in the coastal town of Jask.

So is it possible that Iran conducted a two-missile strike against a U.S. destroyer or ship, whether it be a cruiser or a destroyer, based on what we know and where it's staged with the Lincoln and its assets? I believe that that was very likely the USS Murphy. The USS Murphy is one of the three destroyers assigned to the USS Lincoln Carrier Strike Group that has been in the area patrolling. You have the USS Peterson, the USS Spruance, and the USS Murphy out of the Lincoln's Carrier Strike Group. And then you have the USS Mobile Bay, which is a destroyer out of the USS Tripoli Strike Group.

## **#Nima**

It was the USS Canberra.

## **#Anthony**

It was the Canberra. Okay, the Canberra and the Murphy. So the USS Canberra is actually from the Ford carrier group that has been assigned to the Lincoln carrier group in the region. They're all under Fifth Fleet now. So the Canberra and the Murphy were both, before hostilities began or during this period of ceasefire, off the coast of Qatar. So seeing that it's the Canberra that took these strikes means that the U.S. is pushing closer with its patrols to the actual strait. What we know today is that today, the 4th of May, Project Freedom began.

That's the operation that the U.S. announced last night, that U.S. naval assets would guide commercial ships through the strait. Now, what's important to understand is that "guide" does not necessarily mean "escort." Guide can be a series of things. Guide can be radio communication. Guide can be navigational assistance. Guide can be providing aircraft from a ship overhead to help reconnaissance or to help oversight, overflight of ships through the Hormuz. It doesn't necessarily mean that it's going to be escorted.

But if there is escort, or what we're seeing now with U.S. naval assets coming closer to the actual Strait of Hormuz, the key bit of geography here, the key terrain, if you will, is that this is becoming very similar to August of 1964 in the Gulf of Tonkin in Vietnam. A very small naval engagement—nothing to write in the history books in terms of that naval engagement—but what that naval engagement did do was draw the United States directly into the conflict at scale, hundreds of thousands of troops deployed to Vietnam because of the spark of that incident. This situation right

now that we're witnessing this morning and today in the Gulf, in the Strait of Hormuz, is very reminiscent of that powder keg, of that spark, much like what we saw in Tonkin, that can draw the United States in further in terms of having to take action militarily to control the strait. We're also seeing that Iran has struck the UAE.

## **#Nima**

You know, when it comes to the UAE, it's somehow strange. The state decided to get out of OPEC and the other organization, they had OAPEC, which is an organization among Arab states. And then they decided to get out of the GCC. And right now, talking about these attacks, Iranian attacks on these two ports, they say the Islamic regime in Iran will regret May 4th, 2026, just as Hamas did after October 7th. That's a promise. Where does it come from, and how do they talk? Do they really believe that they can do something against Iran single-handedly, or together with Israel? They're thinking of this? How do you see that? Let's assume the UAE decides to go against Iran. What do they have to attack Iran?

## **#Anthony**

You know, the UAE has a very effective small military, but certainly not one that could oppose Iran at scale. So if the UAE were to respond unilaterally, it would be very limited. It would be a slap on the hand. It would not make that much of an impact. Could the UAE respond symbolically, retaliate in a limited way? Sure. But in order to actually have a response that would yield any type of effect or measure against Iran, you'd have to have Israel and/or the United States and other allied nations that would ally, pretend Saudi Arabia, with the UAE in a larger-scale response.

So as you see, if the UAE were to respond at scale, they'd be drawing in other nations directly—Israel, Saudi Arabia, the United States. Israel has said recently, moments ago, that their intelligence assesses that the U.S.-Iran ceasefire is within hours of collapsing, an assessment that I happen to agree with, and that they have ordered the opening of all of their underground bunkers and bomb shelters, meaning that Israel is in some way anticipating some type of military action. So does that mean that Israel might be joining in with the UAE for retaliatory strikes? Potentially.

Would Saudi Arabia join in on that because of Saudi Arabia's ties with the UAE and both the UAE and Saudi Arabia's longstanding rivalry—hatred, if you will—against Iran? Could we see that forming? Absolutely. Would the U.S. walk away from this? If you look at what Donald Trump has posted on Truth Social over the last few hours, it would seem that Donald Trump and the United States could walk away from this. But I do not think that will happen. We've seen this, we've heard this rhetoric before from Donald Trump: well, Europe, it's your problem now, or Gulf countries, it's your problem now. And yet here we are—we've stayed, we've escalated, we've increased naval forces to the region.

So we are at a fork. We are in the horns of a dilemma. And within the horns of the dilemma, you have worse choices and worst, worst choices. You have bad choices and worse choices. And right now, at the fork of that dilemma, this has all of the ingredients, all the potential, to become escalated—more escalated—very quickly. And that fight over the Strait of Hormuz will be very devastating for those Gulf countries that share that coastline: Oman, the UAE, Qatar, Saudi Arabia, Kuwait, southern ports of Iran. This is going to become a very dynamic and kinetic naval and land-based coastal fight. It has all the ingredients for it.

## **#Nima**

You know, it's so tricky to somehow believe what Donald Trump is putting out and to find what is the policy, what is the official sort of move under power. The other point is that he said that we've shot down seven small boats, which later on we learned that the Iranians are denying, that nothing of that sort has happened so far. And I don't know what to believe, because they said that they sunk an Iranian ship as well, which wasn't the case. I don't know what that is. And he said that if Iran attacks American ships, he's going to respond. Obviously, we don't have American ships in that region, and the United States basically doesn't use the Strait of Hormuz. What is your understanding of Donald Trump? Can we simply ignore what he's talking about, just looking at the moves in the region in terms of the military, refueling tankers, how they're trying to move the Air Force in the region? What are the basics to understand the behavior of the United States? Because Donald Trump himself is so confusing.

## **#Anthony**

Well, I think that's by... I would say that Donald Trump's narratives and comments on Truth Social and other things that he says, that it's deliberate psychological warfare or psychological deception. But I don't think it's deliberate. I think that Donald Trump responds off of feeling. I think that Donald Trump responds off of an immediate reaction to how he sees the situation at its surface level. In fact, this was my experience in his response to when we were ordered to leave Syria, and then we stayed in Syria, and then we withdrew, but then we reduced, but then we went back. All the same.

I mean, this is the same. This is the Donald Trump playbook. So when you look at how Donald Trump is responding to this on Truth Social and what he's saying to the American people, I think that it is much more targeted at the stock market than it is at actually the truth of military action. We're seeing a continued buildup of Navy forces. We're seeing a continued buildup of ground forces. We're seeing a continued buildup of strategic logistics assets, such as KC-130 tankers, Patriot missile systems, other types of naval aircraft that support these carrier strike groups specifically in logistics.

So adding to that risk, now not only having destroyers, cruisers, aircraft carriers, submarines, amphibious warships, now you're going to have a lot of logistics vessels flying or a lot of logistics vessels at sea in the area, which are also vulnerable in terms of being targeted because they

obviously don't have the level of air defense or sea defense. To Donald Trump's point, that many fast boats of the IRGC Navy have been destroyed or sunk in the vicinity of the Strait of Hormuz, either north of it in the Persian Gulf or south of it in the Arabian Sea, it's likely. I mean, that's very likely. The swift boats, you know, they're not heavily armored, they're not very large, but Iran has thousands of them.

And these swift boats do also carry anti-ship missiles. They carry anti-ship missiles similar to what, you know, where we saw the potential of this, where I was looking at it on the map, and I think it's since come out as confirmed, where the strike may have emanated from Iran was likely from the coastal batteries of Jask. Jask is a coastal island off the coast of Iran in that portion where Iran shares its coast with the Gulf of Oman. So emanating from there, we know that Iran does have a significant armament or a significant amount of their anti-ship cruise missiles. And that's their Noor missile, their Zafar missile, their Nasir missiles.

And what's interesting about these particular missiles and their range capacity, anywhere from 50 to 250 kilometers, which more than easily covers the entire Strait of Hormuz, is that these were designed and replicated from the Chinese version of their anti-ship missile, the C-802. So this is a very deadly, capable anti-ship missile, of which Iran has a lot, but also it's very likely that China has provided Iran with the capability to fire its C-802 shore-to-ship missile, or its anti-ship Harpoon missile, which, in terms of coastal defense and defending waterways, are very, very effective.

You know, what's interesting about the missile that I was looking at, what likely was fired by Iran and that type of missile, if it was the Noor missile, this missile has what's called sea-skimming capability. It can fire direct, it can fire ballistically, it can fire as a torpedo, or it can skim along the water. Why does that matter? Because if you're a sonar man or a radar man on a destroyer or a cruiser or a tender or a ship, seeing things flying through the air, okay, that's easy. Seeing things coming under the water, okay, that's easy. A missile skipping over the water is very hard to detect on radar or on sonar because you have waves, you have, you know, surface-level interference with radar, and sonar is always the hardest to decipher.

So if you have a missile that has the ability to be fired from the shore, not from a ship where you can see it emanate and lock in from its origin, but from the shore that can then skip along the top of the water, that can be very risky to naval forces. I know that earlier this morning, as I woke up, I saw reports that the IRGC claimed that they did fire. Central Command said that we were fired upon but not hit, or didn't confirm or deny a hit. Iranian media has said that there was firing and there was a successful hit. Is it possible, and is it likely, that the firing of a coastal anti-ship cruise missile succeeded in striking a U.S. ship? Yes. Is it confirmed? Not yet.

But as we're seeing the Strait of Hormuz becoming more and more the center of gravity, that's a very congested area. Nautically, it's very small, and you have a lot of countries that share that very specific coastline. So, to me, this has the powder keg spark of the Gulf of Tonkin, the alliance formation of World War I, and the modern-day tensions of what we've seen in this specific region

between the Gulf Coast countries and Iran. All of those things together at this imperative fork in the road do not portend a peaceful, negotiated outcome in the coming days or weeks. I foresee protracted naval war, air war, and potentially the United States exercising the option, as I've said, for potential ground forces.

## **#Nima**

You know, everything is going crazy right now. Just moments ago, we learned about a missile alert in Abu Dhabi in the UAE. We had that happening, and, you know, the officials in the UAE are talking about the IRGC being ended once and forgotten soon. It's unbelievable, this sort of statement from the UAE and Iran. Do you think—let's put it this way—looking at the United States today, if they decide to get back to the war, what do they need, and what would be a game changer? Because we know how the United States prepared itself before February 28th. Comparing to that moment right now, what do they have that would be some sort of game changer to change the game or put more pressure on Iran? Is there any sort of that in the strategy of the United States, or Israel, or together with the UAE?

## **#Anthony**

Well, we do know that the United States has introduced hypersonic missiles to the region. We know that the United States has deployed more PRISMs, ATACMS, which, if you consider what the future conflict escalating could look like, I think it'll be less likely where you're seeing Iranian missiles and Israeli missiles flying towards each other, Gulf Coast countries kind of in the crosshairs of radar defense or other missile capability. And we're going to see this really concentrated into the coastal regions of the Persian Gulf, the coastal regions of the Gulf of Oman, and then particularly the Strait of Hormuz. Because I think now that we've, you know, as this war has continued, and I agree with Iran's assessment that there's not a ceasefire.

Having a naval blockade, which the United States has maintained, that's not a ceasefire. A naval blockade is an act of war. So has there been a ceasefire? No. Has there been a perception to say, OK, we're not shooting at each other anymore? And have we seen that the United States and Israel are taking advantage of that time to restock, rebuild, redeploy? Yes. Is Iran also? Yes. So in this round of renewed hostilities, which is very likely, as I said, I agree with Israel's intelligence assessment that the ceasefire between the United States and Iran is hours away from crashing. What now is brought to the table that was different from the previous 61 days of conflict? I think that the strikes by the United States are going to have to be more precise because we are running out of munitions. That's a fact.

That naval forces in the region now are bifurcated. You have a bifurcation of your naval forces between those in the Persian Gulf near Qatar on the coast of the UAE, and then you have the rest of the force south of the Strait of Hormuz in Oman, the Arabian Sea, and all the way out to the Indian Ocean, where the USS Lincoln is at sea. You have to connect those two. You have to bring those.

It's like the campaigns of World War Two, where you had U.S. naval forces within the first island chain and U.S. naval forces outside of the second island chain. And then Japan struck Midway, which is right at the line of the second island chain.

Part of the whole campaign was to reunite or link naval forces through that island-hopping campaign. Something's going to have to happen to link those naval forces to actually gain a position of military advantage at sea. To me, that looks like at the Strait of Hormuz, um, you either Hashem Island, um, you have to do something geographically to seize control of the Strait of Hormuz to have freedom of navigation through that point. That is a choke point. It's not only a choke point commercially, economically, it's also a choke point militarily when you consider naval warfare.

So I see all of what we've seen in the news over the last 24 hours as being all of the steps and ingredients toward a resumption of hostilities that will be much more deadly and direct than what we saw in the first 62 days — as in naval engagements where U.S. destroyers, U.S. cruisers, U.S. Navy ships will be in direct contact, a shooting war with Iranian coastal assets, with Iranian fast boats. You know, just because these fast boats don't pack the punch of a destroyer or a cruiser, they still pack a punch with their anti-ballistic missile system capability.

They carry those on board. We've seen it. So I think that we're at a new phase. I think that Project Freedom, this new phase of the operation we began today, is quickly going to fall apart, and we're going to see the next military phase of Operation Epic Fury. You know, based on what we've seen in the previous conflicts — Operation Iraqi Freedom, Operation Enduring Freedom, changing to Operation Inherent Resolve — could I see this next phase of the operation being called Operation Epic Resolve? Something along those lines, which indicates that we're going to be there a while.

## **#Nima**

Donald Trump is asking South Korea to join the game, to join the war. Yep. Because South Korea was—one of the tankers from this country was hit by some sort of missiles or drones in the Persian Gulf. Do you see that happening?

## **#Anthony**

I do not see South Korea becoming directly involved with their Navy. They have a much larger problem existentially to their north. That would be—man, that would hand Kim Jong-un the victory without war if South Korea moved their Navy. Because we've already—remember, we've already taken Patriot missile batteries out of South Korea to deploy them to this region. So, no, I do not think that South Korea will join this war directly, militarily, with its Navy or its military. Could I see that North Korea would join in on the side of, in principle, or as a supporter of it in terms of an alliance? Potentially. But what do I see them contributing directly in terms of troops, Navy, or Army? None.

## **#Nima**

I think when it comes to the reality of GCC countries, since the UAE decided to withdraw from GCC, from OPEC, from OAPEC, all of this, nobody somehow—you don't see that sort of partnership that we've seen before. Saudi Arabia, by the way, they were fighting the UAE in Yemen, in Somalia, in Libya—they were fighting each other. And right now, those economic ties they had before are just weakening. And the UAE is getting closer to Israel. That's why this UAE official is talking about October 7th and May 4th going to be October 7th, because they're feeling that they're part of Israel, you know, they're part of that country, that group. And you know, it's so amazing—I don't see, you know, when it comes to the UAE, what is the importance of the UAE for the United States?

## **#Anthony**

Well, the importance for the UAE, for the United States, is one of regional reputation and presence in the region. Prior to May 1st, when the UAE was still part of OPEC, I would say that that alliance and partnership was much more important to the United States and to the global oil market. Not so much now. But that is the risk in terms of, you know, when the UAE left OPEC and went at it alone, so to speak. Yes, their ties are going to grow much closer to Israel. They need an ally. They need a partner. It's no doubt that the alliances that the UAE shared with other regions of OPEC or other nations of OPEC were based upon their... their...

They're being members of OPEC. Do Saudi Arabia and the UAE have a history of rivalry? Of course. However, there was also a sense of economic ties, at least in that regard. And, you know, to the same point, Saudi Arabia and Iran are, you know, inherent existential rivals. So the UAE leaving OPEC—could that have an impact on the United States supporting them directly, militarily, or economically? It could. However, because their ties are becoming closer to Israel, could Israel respond on behalf of the UAE? Yes. There then links the United States. So, the reason the rhetoric we're seeing from the UAE is so closely tied to that of Israel is because it's a diplomatic reach.

It's a diplomatic reach without having to openly ask. So we know that Israel has given the command in Israel to open all of its bunkers and bomb shelters. We know that Israel is on alert. So Israel is anticipating something. So does that mean that Israel is anticipating something because they know that they're going to be directly involved in some sort of retaliatory strike or strikes on behalf of the UAE against Iran? I think so. Israeli intelligence is saying that the ceasefire will crumble in the next few hours. Do they know something that we don't? Likely. So does all of that look like the hostilities resuming based on who fires the first shot?

I don't know. You could consider the first shots already fired by Iran in terms of firing at the U.S. naval ships. But then again, U.S. naval ships were conducting a blockade, which is an act of war. So when you look at the so many kinetic parts, is there bound to be conflict from that? Absolutely. Like

I said, I think if you take the aspects of the Gulf of Tonkin, the alliance formations of World War I, and all of the long-term histories and tensions in this region, all of those are now together at this critical juncture. And I don't see a peaceful off-ramp right now at this point.

## **#Nima**

Yeah. Netanyahu's trial session tomorrow has been canceled due to security tensions. Here is what was reported on Channel 14. Israel, they're talking about Israel being ready to resume the war with Iran and waiting for Trump's green light. And this is what was reported on Israeli media. The point is, Anthony, that the war, if, you know, we know that the war started when they had all these beautiful, as Donald Trump wants to put it, big, beautiful radars in GCC countries, not only there, in Israel as well, and the communication with the air defense system. They had everything before this war started.

But right now, the situation in Israel is such that you can see Hezbollah rockets getting through the air defense system and hitting targets in Israel. This is the reality of Israel today. Are they going to be able, you know, who's going to absorb more punches before, you know, feeling that the collapse is coming? This is the problem right now. We are talking about two tiny states, Israel and the UAE. They're not that capable of absorbing these punches, these hits by missiles, and the air defense system is not there as it was before this war started. And how is that going to bring some sort of leverage if they are seeking that?

## **#Anthony**

Well, I think it's important to look at, though the UAE and Israel are small countries geographically and in population, if you look at the... let's look at the capabilities, let's look at the strengths. Obviously, their air forces, F-35s, the UAE is also a customer of foreign military sales of a lot of exquisite military equipment. The UAE's military is very small, but it's very potent. But to your point, what we've seen so far in terms of any air interdiction into mainland Iran, we've seen successes along the coast, you know, the coastal regions. Any attempts to deeply penetrate into Iran have been met with resistance and failure, i.e., the United States mission for the downed recovery pilot near Isfahan and the loss of its aircraft.

When the Israeli F-35 flew deeper into Iran, it was interdicted by a surface-to-air missile. So we know that regardless of the UAE and Israel's strengths, those strengths are not enough to bring a drastic change in how Iran can fight. So to your point, what can the UAE and Israel do alone? Not enough. Will the United States be drawn into this further and directly? One, the United States is already directly involved in its blockade. But will the United States be brought back into this in terms of a kinetic air-land shooting war? I see the likelihood of that as being yes, especially if you see Israel coming in. And I do think, based on Israel's position, Israel's preparations, Israel's narrative, what Israel is saying, that Israel is going to get involved in the coming hours or day.

## **#Nima**

Yeah, it seems that that safe passage that the United States defined in the Strait of Hormuz, which is close to the Omani shore, and they tried to find a route for these tankers—nobody's using that. Nobody's going that far. And I think, Anthony, when it comes to the Strait of Hormuz, there is no solution for the United States. It doesn't matter. They're trying. As Donald Trump is desperately trying to bring South Korea to the war or Europeans to the war, nobody's going to go there. Because if the United States, with the Navy of the United States, is not able to open up the Strait of Hormuz, how can someone imagine that the Europeans would participate, or South Korea?

And I think we had the phone call between the Iranian foreign minister and the foreign ministers of Saudi Arabia, Qatar, and Turkey. They were talking. Iran was updating the latest proposal on the part of Iran, which is a 14-point plan right now. And most of those points are basically coming from the 10-point plan. And considering the complexity of what's going on, now, is it possible for the United States to open up the Strait of Hormuz? Or are they getting to the point that it's impossible? You cannot sacrifice, and nobody's going to sacrifice their life or their tanker because of what Donald Trump is putting out, you know, forcing them.

We have opened, you know, part of that. They said today that two of these American ships passed through the Strait of Hormuz without having any sort of difficulties, but then it was rejected by the IRGC. They said nothing of that sort has happened because they want to give this sort of mindset, this sort of understanding to these tankers in the region that if the United States is passing, you can pass. And that's not the reality. I don't know how that is going to help the United States and Donald Trump himself.

## **#Anthony**

Yeah, when you look at what can be done, what should be done, and what's realistic. If the United States wanted to forcibly open, take, capitulate, control the Strait of Hormuz, it would require extraordinary resources beyond our long-term ability. It would come at an extraordinary cost and the loss of naval assets. In order to do so, you would have to punch through the strait with destroyers and cruisers in order to establish naval dominance on both sides of the strait. You can't just control one side of it. You don't control it. You can't control just the Persian Gulf side, the Arabian Gulf side, the Gulf of Oman, or just the Eastern or just the Western.

You have to control all of it because we're talking about a very narrow navigable passage. So it's omnidirectional in terms of how you have to control it. So what that would entail is the United States having to control and secure the west with air defenses, with land defenses, with naval defenses on the west, on both the Persian Gulf and in the Gulf of Oman, along the Strait of Hormuz itself, within the channel. And then on the eastern side, there lies the challenge because Iran does control it. And

even if you were to succeed in taking, let's say, Qeshm Island, which could be the eastern anchor to the defense, you'd have to hold it. That would become untenable and nearly impossible for the United States to succeed in doing.

And in doing so, it would absorb extraordinary loss of life. So the options that the United States has to actually control the Strait of Hormuz, to guarantee safe passage, to escort commercial ships through—that doesn't exist. That is a fantasy. The United States is not escorting ships. This whole Project Freedom, that the United States will guide commercial ships through the Strait of Hormuz—what does “guide” mean? It's not escorting. So what the U.S. can achieve realistically is not total control of the Strait of Hormuz. What we're going to see is that there will likely be a resumption of hostilities. It'll be very intense. We're going to see the United States plan for it.

We already know it's being planned. We already know that the U.S. Central Command commander, in his visit to the Situation Room last week, sitting down personally with Donald Trump and Pete Hegseth and the chairman of the Joint Chiefs and the joint military planners in the room, presented plans to Donald Trump—one of those being the blockade, which we're seeing now, or the continuation of the blockade through Project Freedom. But then the courses of action emanating from, if that fails, what a potential ground attack would look like—large-scale or small—and what options there would be in terms of which terrain that would be. Is that Qeshm Island? Is that Kharg Island? Is it both? Is it simultaneous?

All of these plans were presented to the president. So what we're going to see in the next coming hours and days is negotiations fail, tensions rise, the ceasefire ending, hostilities resuming—either initially unilaterally by the UAE and potentially with support from Israel—which then draws in the United States directly. And then those options that the Central Command commander presented to the president being some type of seizure or control of land in an attempt to guarantee passage or control of the Strait of Hormuz. The Strait of Hormuz has become the center of gravity. The Strait of Hormuz has become the trump card. He who controls the Strait of Hormuz controls the tempo of how this war is evolving.

And right now, that's Iran. That's indisputable. Iran controls the Strait of Hormuz. So in the coming hours and days, I think we're going to see drastic escalation. All escalation, you would hope, is a way to bring negotiation back to the table. At some point, the United States is going to have to negotiate. And the longer this war goes on, the more we deplete our missile stocks, the more we put our Navy at risk, the more we overextend our military forces, the less able we are to come to the table and negotiate from a position of strength. What that negotiation looks like, as I've said before, the end of this conflict will change the geopolitical structure of the world.

## **#Nima**

Yeah. What does it mean? To what extent are you talking about? What does it mean for you when you hear China is going against the United States with the regime of sanctions? You see, China said

to the refineries in China, don't care about the U.S. sanctions, you can cooperate with Iran. If they hit you, we're going to hit the United States. How far is that going to go?

## **#Anthony**

Well, so, you know, I think China has the ability to sustain that. But we're also seeing direct alignment with Tehran and Moscow. The visit with Foreign Minister Araqchi and Putin was no small meeting. That was not something to be just set aside and overlooked. That was significant. So if you look at the UAE leaving OPEC, if you look at new alliances that are forming—the UAE and Israel growing closer in the region, Iran generating economic, military, and diplomatic ties directly with Russia and China, who in a way share their landmass between Central and Western Asia—these new alliances that are forming are different than the alliances and the treaties and the negotiations and the negotiation partners throughout the world that we saw prior to this conflict.

Did this conflict directly lead to the elements of the UAE leaving OPEC? I think so. Has this conflict directly led to China welcoming Iran with open arms and standing for Iran against the United States directly? Yes. Has this conflict opened the arms of Moscow to Tehran, where we're seeing this new friendship in a way growing? Yes. At the resumption of this, whether it's long or short, there will have to be some type of negotiated settlement, peace, negotiations. And when that happens, the United States will emerge no longer as the global hegemony. The new alliances will emerge economically and diplomatically, namely with China and Russia having a leg up specifically in this region. And the United States will be in a weaker position globally because we have overextended our military, our assets, our missiles, our air defense, our capabilities.

We've revealed a lot of our technology to Russia and China because we've used it to defend Israel that we would have otherwise used, that we would have revealed in the case of a large-scale conflict. But a lot of those capabilities have now been revealed. We've shown that. We've revealed the hypersonic missile that we've been working on. We've revealed it now. Look, we have it. No secret anymore. So when you look at the U.S. position in the world, as every day of this war goes on, that position is not improving. We are not winning bigly, as Donald Trump would say. We're losing influence and power every day. And I think in the coming hours and days, hostilities will resume, and they will be quite kinetic for an intense period of time.

## **#Nima**

Yeah. Let's see what happens. Thank you so much, Tony, for being with us today. Of course, thank you.

## **#Anthony**

As always, you have a great day.

## **#Nima**

I think we have to update. I may contact you during the week and see what we can do. Always available. Thank you, Tony. Thank you. Bye bye.