

# John Helmer: Ukraine to Hormuz: The Global Power Shift No One Sees

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## #Nima

John, what do you make of Operation Freedom that Donald Trump has announced? And yesterday we had some sort of chaos in the Strait of Hormuz, and they were trying to send these oil tankers, making some sort of chaos and trying to force these tankers to pass through the Strait of Hormuz, through the pathway that the United States tried to define as a safe path close to the Omani shore. And it has failed, and they couldn't achieve it. But how did you find it? What was that, in your opinion?

## #John

I think what we're seeing is a series of measures that Trump has agreed on with his military and with the civilian leadership—so Vance, Marco Rubio at State, and the Treasury—to appear to be offering a peaceful track and preparing the kind of provocations for Iran so that if the, quote, peaceful track is contested, Trump can claim that Iran opened fire, provoked, and triggered the kind of massive attack that he's been assembling his forces to carry out and has been preparing for some days now. On the one hand, it's essential to Trump psychologically, personally, and politically to show that he's winning. And I draw everybody's attention to this near-mad tweet that the White House has put out.

I've published an analysis of it in *Dances with Bears*, [JohnHelmer.net](http://JohnHelmer.net), this morning, in which Trump is shown to be saying the word "winning." And this is repeated once a second, repeated over one hour and 18 seconds. That's 3,600 repeats of the word "winning." Now, such an act is symptomatic of degeneration—psychopathological degeneration, neurological illness on the part of Trump. But let's leave aside that and treat it as a rational display of his need to demonstrate to his voter base that he's winning. Just bear in mind, folks, that as we've been saying for some time now, if the Republicans lose control of the Congress, Trump faces, after November 3, and certainly when the new Congress assembles, not only a majority for impeachment but a potential supermajority for the invocation of the 25th Amendment of the United States Constitution.

That's the Declaration of Presidential Disability. We're facing that, meaning he knows he's facing that. That's pretty grim. This tweet "winning" is symptomatic of what he needs politically. And I think that the attempt to show a military success in escorting vessels out of the Hormuz, with prearrangements—a very valuable Greek source I have is suggesting to me this morning that some of the background negotiations are setting up vessels in coordination with the US that were already planning to move out with Iranian permission. In other words, there are a variety of secret setups to make it look, for Trump to show, that his military guidance, military escort policy is working when it isn't.

Now, if on the other hand it fails, as you've correctly said it will and it is, Trump is looking to have a kind of Gulf of Tonkin provocation. That is to say, to make it clear that he's not to blame, the IRGC opened fire, broke the ceasefire, leaving him no alternative but to launch a massive attack, which he's been assembling and which his military advisers are suggesting, including Vance, it's reasonable to suspect, will be believed to be likely to fail in its war objectives, likely to cost in U.S. losses. But nonetheless, Trump wants to show he can win by violence what he failed to achieve by negotiation. Either way.

Of course, this isn't a Gulf of Tonkin setup, as Lyndon Johnson attempted to set up with the Vietnamese, because the U.S. is already at war with Iran, and we're in a ceasefire. The war has already started. So we face a setup in order to justify resumption of an offensive. So we've got a double track, just as we have two tracks, the Oman side and the Iranian side out of the Hormuz. And essentially, we're having a shadow play for two tracks to achieve two purposes, summing up to one mad doctrine—mad in the neurological sense, mad in the psychopathological sense—that Trump has repeated, "winning," repeated 3,600 times on the White House website. Yeah.

## **#Nima**

John, here is what the head of parliament in Iran said. He said the equation of the Strait of Hormuz is in the process of being solidified. The security of shipping and energy transit has been jeopardized by the United States and its allies through the violation of the ceasefire and the imposition of a blockade. Of course, their evil will diminish. We will fall back. Now, we know full well that the continuation of the status quo is intolerable for the United States while we have not even begun yet. And we've seen what has happened to the UAE yesterday.

Iran simply is defining two lines, and these two lines can be seen in this picture—two yellow lines. And it goes to the western part of the Strait of Hormuz and comes to the eastern part of the Strait of Hormuz. It includes those two important ports of the UAE, which they wish they could use after getting out of OPEC, OAPEC, and the GCC. They can sell more oil and energy by using these two ports. But it seems that Iran effectively is, you know, removing that opportunity for the UAE. What is the game there, in your opinion?

## **#John**

You're asking me to talk about Arab-Iranian politics. I'd better not go that far.

## **#Nima**

No, I'm talking about not Arab-Iranian. I'm talking about how the UAE is getting closer to Israel and the United States in order to somehow feel that this way can improve their position, the situation they're in right now.

## **#John**

Well, that is an Arab politics question. It's clear that the UAE has suffered far greater losses than it ever anticipated. And each of the strategic directions it was planning—a strategic direction with Prime Minister Modi's India, for example—that would have established the UAE with India as the sort of Persian Gulf anchor for the IMEC, the India-Middle East-Europe corridor to Greece and then onwards to Europe. That entire trade corridor has collapsed. The UAE's attempts to neutralize or equalize its political reach compared to Saudi Arabia have collapsed.

It's suffered significant strategic damage to its economy—both tourism, as a trade hub, as a financial hub. All of those things have been strategic losses. So it's got nowhere to go except towards the United States. And it's obviously a significant problem if Iran basically demonstrates to the UAE that if you go in that direction, we'll stop you, we'll punish you, we will inflict a cost on you that the U.S. can't compensate. That seems to me to be the position. Do you disagree with that, or do you see it differently?

## **#Nima**

No, I don't see that the UAE can understand the situation they're in right now, but I feel that somehow other GCC countries like Qatar and Saudi Arabia, they don't know what to do—mostly Saudi Arabia. They're trying to manage their position, but they can't find a solution for that.

## **#John**

They've got to manage their position by balancing against the U.S. with Iran. They've got to do more balancing than the UAE is capable of showing it can do right now. That's true. What I can refer to here is that Iran's Foreign Minister Araqchi has tweeted this morning, as I understand, the following statement, and it's a puzzling one to me, but I think it connects to Iranian calculations about Arab politics too. Araqchi said this morning by tweet, as talks are making progress with Pakistan's gracious effort, the U.S. should be wary of being dragged back into the quagmire by ill-wishers.

Now, I'm not aware that the talks are making any progress at all. In fact, so far our conversation has focused on attempts by Trump to lead us back into a post-ceasefire war situation or a post-ceasefire Hormuz regime, which he's calling a victory.

I don't see that the talks are going anywhere at all, on the U.S. side or on the Iranian side, though from an Iranian point of view the talks are making progress because the U.S. is not advancing its negotiating stance. What I don't understand is, the U.S. should be wary of being dragged back into a quagmire by ill-wishers. Is that a reference to Israel? Well, that's not a reference—it's a peculiar way for the foreign minister of Iran to refer to Israel. It's an intimate ally of the United States; it's hardly an ill-wisher. Both of them are exactly the same towards Iran at this point. Is the ill-wisher the UAE? Is it Saudi Arabia? Is it Kuwait? Is it Qatar? Is it Bahrain? More likely Iran.

## **#Nima**

Yeah. John, here is what was published in the Financial Times. It shows that the loss of oil supplies throughout history, you see, goes back to the Iran-Iraq War, the Iraq War, and Libya, and all comes to the Strait of Hormuz right now. It's not even comparable, what's going on right now with the Strait of Hormuz.

## **#Nima**

Because whatever comes to the minds of these people in Washington—you mentioned that they're preparing for a new attack, which is actually what is happening. If we want to be logical about what's going on in the Middle East, you see that they're gathering, they're bringing a lot of weapons to the region. They're preparing for a new attack. I think that's a fact from what we've seen so far. But how is that going to solve or resolve the problem they're facing right now with the Strait of Hormuz? This is the biggest problem of the Trump administration. And you've mentioned Araqchi. Araqchi yesterday said they're not even talking about the Iranian nuclear program anymore. That's not on the table anymore.

## **#John**

Well, remember, we did try to explain it last time. It's the third stage of the negotiation as Iran spelled it out. The first stage and second stage are ceasefire negotiations—peace in the region, particularly to stop Israel's further attacks in Lebanon. The second stage is the Hormuz. Nuclear talks are our third stage, but we are stuck in the first and second stage. So that's where we are in Iranian terms. And the U.S. is basically having the initiative taken away from it, inasmuch as we're at the first and second stage—ceasefire and Hormuz regime.

Let me just go back to the bigger question you raise of how does the U.S., or how does the Trump administration, or how does the White House calculate it can make gains in a situation that you've just described as almost certainly a losing one? So let's just look at the way in which, technically, a

White House at the beginning of the driving season and the midterm elections thinks. The way a White House thinks is in terms of polls. It measures how to translate votes into power, how to convert displays of power into votes. Now, right now, this week, the latest average of opinion polls—public approval of Trump—he's losing another percentage point or 1.5 percentage points.

What does that mean? Well, just bear in mind, he allegedly was the target of an assassination attempt only a few days ago. So let's just say he got no benefit from being attacked. No rally around the flag. No sudden mobilization of undecided voters in sympathy. There is no sympathy vote left for Trump. The undecided voters who are neither identifying themselves as Republicans or as MAGA—let's call them hard Republicans—or as Democrats are increasingly polarized. And Trump gains nothing from any domestic issue. His disapproval rate for inflation—wait for this—his disapproval on inflation policy is minus 39%, minus 39%.

Well, there's the answer to your question about the oil shortage coming out of Hormuz. It's translating directly into massive disapproval among U.S. voters, a fear of inflation. So that, in turn, is pulling down Trump's approval, increasing his disapproval. And as that gets worse, approval of military action against Iran is getting more negative. So there's only one way out that Trump can think of winning, as we just explained, and that's to position himself as either having been provoked or to position himself as, in some sense, achieving a victory. Now, how is he going to achieve a victory right now? Let me make a prediction, which all our audience can fault me for in a few days' time.

May 14th, on February 25th, 26th—remember, 48 hours before the U.S. and Israel launched their attack, their war on Iran—Prime Minister Modi of India went to Israel, and in the Israeli parliament he announced "Am Yisrael Chai," which is an Israeli Jewish war cry, a very ancient one, and it means to the Israelis that the Indian government was backing their war. My own view is that this is what Trump intends to do with President Xi Jinping of China on or about May 14th, 15th. In other words, Trump is going to announce that his principal strategic adversary in the world, China—against which most of the Pentagon policy planners devise war plans, economic sanctions plans, long-term strategic containment plans—China and the United States will be in a hug. That's what Trump promised Xi.

And if there's to be a new attack on Iran, Trump is going to do it as if under Chinese approval, in the same way that Indian approval was conveyed by Modi on February 26th. So watch for May 14, 13, 15. Trump arrives in China May 14, 15. Let me add a few things to indicate just where China is right now. For the time being, the foreign ministry has stopped giving daily briefings. We're on Tuesday. There hasn't been a Chinese daily briefing at the foreign ministry since April 30th. That's last Thursday, if I've got my dates clear. Wang Yi, the foreign minister and a Politburo member, so very close to President Xi in a way that other ministers have not, had a phone call with Secretary of State Pompeo on April 30, and I'm looking at the so-called readout.

Listen to what it says in the context of the plan of the U.S. attack on Iran and the plan of the U.S., let's say, guidance, freedom operation, attempt to force open the Strait of Hormuz. With those in the back of our minds, listen to what Wang Yi says. This is the Foreign Ministry's version. He says, Wang Yi says the head-of-state diplomacy, meaning Trump and Xi, has always been a stabilizing anchor for China-U.S. relations. Under the strategic guidance of Xi and Trump, China-U.S. relations have generally remained stable. Generally remained stable? Who thinks that about the conduct of U.S.-Chinese relations for the last two years? Wang Yi goes on, remaining stable, which serves the fundamental interests of both peoples and meets the common expectation of the international community.

Both sides should maintain hard-won stability, make good preparations for the important agenda for high-level interactions, expand cooperation and manage differences, explore the building of a strategic, constructive, and stable China-U.S. relationship to achieve mutual respect, peaceful coexistence, and win-win cooperation. That's the Chinese carrot. That's the bilateral Chinese carrot. In Russian terms, that's what President Putin keeps saying was the Anchorage formula: build economic cooperation with the Trump administration. But now listen to this part, because that's the part that's been emphasized in the anti-Chinese media in Europe.

Wang Yi underscored that the Taiwan question bears on China's core interests and is the biggest risk in China-U.S. relations. The U.S. side should honor its commitments and make the right choice to open new space for China-U.S. cooperation and make due efforts for world peace. In my interpretation of that, what's Wang saying? Wang is saying, you stop escalating on Taiwan as a threat to us, and we will swap your withdrawal from the Taiwan Strait for our withdrawal from the Hormuz Strait. Of course, he doesn't say it exactly like that, but bearing in mind the international context, bearing in mind the significance of the Hormuz Strait for China-Iran oil dealings, what is Wang saying? He's saying nothing about the instability, his term, that that war is creating for China.

What he is saying is China's ready to make a deal with Trump if Trump satisfies China on Taiwan. And that, from a Trump point of view, is going to be an easy deal to make. And if that's the deal coming up, of course, it'll be words. There'll be American words, and China trusts American words just like Russia and Iran do. If that is the deal that comes up, we have to beware of the possibility that Trump will use China cover now, not simply Indian cover, to resume war. I think that's what's going on. I think that's where we're headed. And I'm sorry it'll disappoint so many of our audience who want to believe that China thinks differently about Iran. I'm glad to hear that Foreign Minister Arakchi is about to go to China.

## **#Nima**

He's on his way because right now we've learned the breaking news that he's heading to China.

## **#John**

Fine, so we can bet our bottom dollar that when he gets off the plane and comes to meet Wang Yi, guess what he's going to ask? He'll ask exactly the questions that I've just raised.