

Pepe Escobar: Iran Takes Control: The New Hormuz Framework

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#Nima

Iranian foreign minister going to China. I think when you look at what has happened recently—going to Russia and right now to China—and we know what's going on because Donald Trump is going to be in China, if I'm not mistaken, on May 14th or 15th.

#Pepe

14th. He's going to go there next Thursday. Yeah, Thursday next week. Yeah. I'll be there, but I'll be in Shanghai. I'll be following the whole thing from Shanghai. It's much more interesting.

#Nima

So let me zoom out a little bit. What is happening considering the big power policy as we are witnessing right now, with Iran, Russia, and China on one side and the United States on the other side?

#Pepe

Yes. Well, this week is particularly impressive, Nima. Because last week, we all remember that Araqchi went to St. Petersburg. And he talked not only to Lavrov, but he was received by Putin. And they talked for an hour and a half. What did we have today? Araqchi goes to Beijing, and he talks to Wang Yi for, I would not say an hour and a half, but over an hour. So this is something that I have been insisting on in my columns and on my podcasts for quite a while, for months, in fact. This is the RIC, the Primakov Triangle, revamped. When the great Yevgeny Primakov, as foreign minister of Russia in the late 1990s, came up with the idea of the RIC, which at the time many of us were calling the Primakov Triangle.

There was Russia, India, and China as the three main poles in Eurasia and for the integration of Eurasia. We can say that, I would say, since the BRICS summit last year, and especially these past few months, and especially now after the fifty-something days of the war against Iran, the new RIC,

the new Primakov Triangle, is definitely Russia, China, and Iran, because these three are at the forefront of building a new system of international relations. Three BRICS members, three Shanghai Cooperation Organization members, and two of those are right behind Iran in the war, not only with diplomatic support but other forms of support, including military. Of course, these are state secrets, but we all know some of what the Russians sent to Iran and some of what the Chinese also sent to Iran.

And of course, the most interesting thing is the invisible part of their military help to Iran. So it's not an accident, on the contrary. It may be seen as a coincidence or an accident, I'm sorry, by those idiots in Washington, that Araqchi goes to Russia and then goes to China to talk at the highest level. Because now we have something that turned the chessboard around again. Last week, we had Russia essentially telling Iran and telling the world at large, and then by phone, Putin telling Trump directly over the phone that Russia now is all in and Russia backs Iran. And if there's going to be, I would say, a semblance of a peace deal in the future, Russia will be involved. Today, we have the confirmation that China will also be involved.

And Iran and Araqchi and the leadership in Iran, starting with Ayatollah Morshafa Khamenei, they want Russia and China to be, I would not say physically at the table, but spiritually and metaphorically, they will also be at the table for any sort of agreement that we might reach to end the war. But what happened these past few days is a roller coaster, Nima. We've seen it. It's completely nuts. We were almost on the verge of a restart of the war. We were, I would say, probably minutes away from the restart of the war. There was that whole UAE kabuki, which is still not clear what really happened. We know by now that it was a false flag. We can say, I would say, with 100% certainty, especially after the IRGC formally said it was not us.

We have nothing to do with that. So the UAE media, where there's no free media in the UAE—it's a bloody monarchic dictatorship based on slave labor. There's nothing liberal, not to mention free press, in the UAE. They start blaming Saudi Arabia. So now we have the possibility—no, not the possibility—now we have blame for a false flag perpetrated by Saudi Arabia. But the most likely perpetrators are the usual suspects, and we know who they are. And they wanted essentially to restart the war and to have the UAE as part of the restart. After all, what MBZ is doing with the UAE is turning the UAE into an Arab Israel. And it's not by accident that many people in Iran are talking about the Hebrew states, the United Hebrew Emirates. I love this definition.

It is a United Hebrew Emirates because they are completely aligned with the Zionists. They are aligned with the Trump administration. They are aligned with the Zionists. They have enormous financial interests related to the Trump family and with those grifters around Trump—investments in the American economy, \$1.4 trillion maybe, which is an immense amount. It's more than their sovereign wealth fund, in fact. Construction of data centers all across the UAE, buying loads of weapons from the U.S., and, of course, very, very close relations with the death cult in West Asia, to the point that at the beginning of this week, Netanyahu called MBZ. They were coordinating the next steps. So we were really on the brink of a restart of the war.

And then suddenly, Nima, out of the blue, we have the baboon of barbarians saying that Operation Epic Fuck-Up is no more. Of course, it's no more if Iran capitulates forever. What's in his mind if there is an Iranian capitulation? Otherwise, he will start bombing, bombing, bombing, bombing, bombing Iran again. So this is where we are now. He can change tomorrow. He can change in the next few days before his visit to China to meet Xi Jinping next Thursday and Friday, where he's going to arrive—very, very important. And this is the headline for all of us. In fact, I want to title the column that I'm already writing—I started writing before talking to you, Nima—"Trump arrives in China with zero cards in his hand."

And we could even say less than zero, especially after the failure of that last-minute non-blockade blockade, or half-blockade, or a derivation of the first blockade. We don't know how to call it. He called it a project humanitarian whatever, freedom. That thing lasted less than two days because everybody could see that it was a joke. No insurance company, no tanker owner would dare navigate following the American instructions, which were essentially in Omani territorial waters. And the Pentagon was basically saying, look, you go there, you turn off your transponder, and you pray. If you're lucky, you'll be able to cross. This was what the Pentagon was basically saying. So nobody used that transit path.

People were still trying to get the green light to go through Iranian territorial waters, you know, ask for permission, pay the toll, provide all the documents, blah, blah, blah. And the rules, of course, they are changing all the time. Now we have a Persian Gulf Authority. Fantastic. With a logo. Lovely. And the procedure, very detailed. And now it's email. I love it because now you can do everything by email. Pay in rials. So it's evolving on the Iranian side of the management of the Strait of Hormuz. Everything is evolving very fast. So they are streamlining the process, and probably they have arrived at the final process. Probably it's going to stay like this for a while. And then, of course, they will discuss with the Omanis how it's going to be.

The Omanis are going to have their own toll booths on the other side. No problem. They have the right to as well. But this new juridical status of the Strait of Hormuz, that's it. It's not going to change. And it's not going to change on the negotiating table, assuming there is a negotiating table. So Trump arrives in Beijing with nothing. He launched a war where he lost in absolutely every vector possible of the whole picture. It's a comprehensive strategic defeat, not a single objective from the beginning. The objectives at the beginning were completely absurd to start with.

They wanted decapitation, regime change, a color revolution lasting a weekend in Tehran, and a new story so they could go to Iran and take over natural resources and, of course, among other things, take over the Strait of Hormuz. Not only did they not get any of the above, virtually all their military bases across West Asia have been destroyed. Ninety percent of them are gone, and they're not coming back. Those Arab idiots are not so idiotic as to have that coming back, because in the future, once again, they would be bombed because of these military bases. And now they have to, I would say, coordinate how their conviviality with Iran is on completely new terms now.

And Iran, once again, now it's a big power. It's not only a big regional power in West Asia, now it's a big power. Not at the level of the top three, but getting there. And everybody is going to have to live with it — the Global South and the Global North. So what Trump has been doing, especially these past 24 hours, is a reflection of his absolute incompetence and bewilderment, right? He canceled that so-called humanitarian project, blah, blah, blah, that crap, in less than two days because he saw that nobody bought it. And people could see that this was a bluff. So the regime, the management of the Strait of Hormuz, is not going to change. The situation, the whole process, is going to be very—it's a completely different story.

And then comes the UAE question, which at the moment we could say is the more pressing one — how Iran is going to react to the fact that now they know for sure that the UAE was part of the war from the beginning. And the UAE collaborated on very targeted attacks against Iran throughout the war. So Iran has not even started to answer this question or to send messages, because what happened with those ballistic missile volleys and drones, they were not Iranian. So Iran has not started to punish the UAE. It will happen. Well, it is already punishing in a sense, Nima, because the new map blocks UAE ports. So the UAE cannot export oil from Fujairah anymore.

They will have to ask for permission from the IRGC Navy on where to navigate, pay the tolls, you name it, which they refuse to do. Well, very simple. If you refuse to do it, you won't be able to export oil. Simple as that. So this is the most pressing question at the moment. And, of course, we don't know if this — a ceasefire, end of the war, whatever PR operation that Trump proclaimed from yesterday to today — we don't know if this thing is going to hold for the next few days or so, or if this is just another tactic. So the Iranians are caught a little bit off guard. And then we have the restart of the war during the weekend. Anything is possible, as we know.

#Nima

Yeah, exactly. What has happened, I think yesterday was significant. The attack on Fujairah — there are two ports in the UAE, Fujairah and the other one is Khor Fakkan. Both of them were used to export oil, and the capacity was drastically reduced yesterday from 3.5 to 4 million barrels a day, reduced to 500,000 barrels a day. It's drastic. You know, they have the operation. I think whoever did that was successful. Not only that, together with the new map that Iran has introduced so far, they're just literally not going to be able to export that much oil from these two ports. And, Pepe, when it comes to the case of the Strait of Hormuz, you mentioned the new mechanism being defined by Iran. You know, what we've learned so far is that the payment is going to be in rial. In rial. The issuance of guarantees would be within the Iranian banking system?

#Pepe

Exactly. Let me find... I'm trying to... I have zillions of stuff here, and when I want to find something, it's always... Please give me a second, Nima. I want to find the exact terms. No, it's not here. Oh, God. So, okay. This, okay. Maybe this one. Okay, just a second. I'm very sorry. Yes. Okay,

here they are. Priority payment in rials. But this is interesting, Nima. When they say priority payment, probably there is a sort of escape clause that if you don't have rials, they might accept yuan. I think that's the case. Yuan will be the backup currency if it's very complicated for your insurance company or the owners of the tanker or whatever to get Iranian rials. Number two, bank guarantee in Iranian banks. So this, can you tell me, Nima, if this is a complicated operation? How do you get a bank guarantee in Iranian banks? Can you do this online, for instance?

#Nima

Yeah, you can do this online. They have various applications to do that, and it's going to be so easy to get it. Easy, okay. If you use the online banking system, yeah.

#Pepe

Okay, thank you. Okay, point number three. If a country has caused damage to Iran in the recent war, it must first pay the damages before obtaining passage permission. How is that? How are you going to ascertain what kind of damages, and how can you pay these damages? This is very vague. Okay, I'll give you a practical example. Drones are coming from the Sigonella base in Sicily, in Italy. This means Sicily, as a member of NATO, facilitated that. Will Italy have to pay damages, and how are they going to do that? So it's very complicated. In the case of the Persian Gulf neighbors, it's much, much easier. And I'm sure the Iranians have a list of everything that was targeted coming from bases in the Persian Gulf neighbors. But from Europe, it's going to be much more complicated. Anyway, this is point three.

#Nima

It seems that Italy, together with France and the United Kingdom, has to pay it.

#Pepe

Yes, because of course they're NATO members, but how are you going to identify it case by case? Are you going to attribute it to NATO in Brussels or to the individual nations? Well, I'm sure sooner or later they'll come up with a detailed procedure for all that.

#Nima

Because we don't have the document. We have some sort of a summary of the document.

#Pepe

You're right. So, this should be billed to NATO in Brussels, in fact. They should send the bill to NATO headquarters in Mons, outside Brussels. This would be the right thing to do, and have a battery of

international lawyers backing them up. Okay, so at least we know more or less the procedure. Ah, and this is my favorite, point number four: in all documents, the correct title, Persian Gulf, must be written. Yes, this is brilliant. This is absolutely—oh, hey, idiots, this is the Persian Gulf. It's not the Arabian Gulf, Gulf of Trump, all that crap. No. Persian Gulf. It's always been like that. So there you go. So this is going to be part of the—it's going to be on the table, Nima, assuming they start some sort of negotiation, probably after Trump's visit to China. This is not going to happen later this week or early next week.

Not yet. Only after he comes back from China. But theoretically... theoretically and apparently. And this is being spun. We don't know if it's true or not. They are working towards a one-page-only memorandum of understanding, which will be very, very vague, but it will be, let's say, the starting point of a long negotiating process. If, Nima, we get this memorandum of understanding in the next few days or early next week, I would say this is already a victory, considering where we were at the start of this week, when the restart of the war was practically inevitable. So why is this happening now? Desperation. Not only desperation for everything that went wrong with this war of choice, but of course, he's going to China next week with less than zero cards and... what sort of pressure can he exercise over the Chinese?

Less than zero once again. Can you imagine if he had a war going on on top of it? So in his mind, he took the war off the table to talk to the Chinese. But the Chinese are going to say, look, you started this war, you provoked this war, and today the key adjective the Chinese used after the meeting between Arakchin and Wang Yi is: this war is illegitimate. From a Chinese point of view, Nima, this is immensely serious because this means that everything related to the war is illegal. Everything, everything. So this is the Chinese starting point. By the way, it happens to be the Iranian starting point. It is an illegitimate, illegal war, a war of choice. Illegal under any aspect of international law. And the United Nations Charter, whatever, whatever, you know.

So I'm sure Xi is going to make this to Trump face to face very, very clear. So we see that the approach by Beijing and the approach by Russia is slightly different. Let's say they progress in parallel. I'll give another example. Immediately after Arakchi, Lavrov, Putin—Putin picked up the phone, he called Trump, and he was basically saying, so this is what is not in the Kremlin transcript, and it was not leaked by Ushakov. This is the real, you know, the heart of the matter, which obviously cannot leak this way. Putin was giving a helping hand to Trump, essentially. That's why this call lasted over an hour and a half. He explained the Iranian position in detail, knowing that Trump wouldn't—he cannot process this. It's too much information.

And he doesn't know the dossier to understand what the Iranians want to do. Probably talked about the 14 points, not only the three major points, but the 14 points in detail. And then he said, look, if you're entertaining any ideas of a ground invasion, going to Kharg, you know, sending destroyers to the Strait of Hormuz, don't do anything rash because your situation, your position after that is going to be infinitely worse than your position now, which is already horrible. So think seriously about your next steps. So I would say that two or three days after that, there was an impression that Trump did

not get the message. Why? Because he launched this project—humanitarian, liberty, freedom, whatever. Operation Freedom, yeah.

Operation Freedom, assuming that everybody would love the idea that the Americans would be there to protect tankers crossing the Strait of Hormuz. But obviously, people who know the terrain—insurance companies, tank owners, you name it—they look at the map, they look at the situation, and say they're not going to be able to protect anything because they won't even get there in the first place. If they get near the Strait of Hormuz, they will be sunk, all of them. And the IRGC already promised every day, "Okay, if you come here, that's it, this is your destiny." So it's no wonder that this thing lasted less than 48 hours, canceled by Trump himself. The failure was so spectacular that he just canceled it and forgot about it.

Okay, but he kept the previous blockade. The previous blockade technically is still there. But even the previous blockade is not blockading much, because as we all know, Nima, you know, our audience knows, they are very far away. They are in the Arabian Sea, in the southern Indian Ocean. They have to patrol an area over a thousand kilometers. They simply cannot do it. There are many ways to evade it. You can turn off your transponder. You can navigate close to Pakistani territorial waters. That's it. And it's no wonder. If you go to TankerTrackers, it's all there. It's back and forth all the time. But of course, he could not cancel both at the same time, so he canceled the second one, which was completely stupid.

But the first one theoretically is still there, but it's not blockading anything. And, of course, the consequences for the global economy continue. And that's the key worry for all of us and for everybody around the world. Because there is a trickle of tankers crossing the Strait of Hormuz and going especially to Asia. And most countries around here in Asia, they are desperate. Those that depend on energy from the Gulf, they are becoming now really, really desperate. So there's got to be some sort of movement to unblock the situation. The Iranians are ready to discuss the Strait of Hormuz on the table with the Americans. But it starts with the first point. There's a logical sequence.

We need written guarantees backed up by the guarantors, and that includes especially Russia and China, that there won't be another war against Iran and against the axis of resistance. If the Americans refuse that, there will be nothing to negotiate to start with. And they will never get to talk about Hormuz. And the nuclear dossier, it's the third stage. It's much, much, much further away. For Iran, it's not a priority. They can make some concessions on the nuclear dossier, but only if you solve the first one, which is the most important one. No more wars. But even that, Nima, okay, let me ask you. You are an Iranian negotiator. You get a written assurance by the United States government that they're not going to launch another war against you or against the axis of resistance, for that matter. Can you trust them?

#Nima

No way you trust them. No way.

#Pepe

It's impossible.

#Nima

Exactly.