

Patrick Henningsen: Who's Really Pulling Strings in the Iran-US Crisis?

See Full Interview: https://www.youtube.com/live/HcCJpGh9M54?si=-Zy2JggE2aOzZF_3 Follow me:
Substack: https://substack.com/@dialogueworks?utm_campaign=profile&utm_medium=profile-page
X (Twitter): https://x.com/Dialogue_NRA Patreon: [https://patreon.com/Dialogueworks?
utm_medium=unknown&utm_source=join_link&utm_campaign=creatorshare_creator&utm_content=](https://patreon.com/Dialogueworks?utm_medium=unknown&utm_source=join_link&utm_campaign=creatorshare_creator&utm_content=)

#Nima

You know, the latest confrontation between Iran and the United States — and we had it in the last 48 hours — the two sides firing at each other. But the latest one is what came just before going live, what came here. The latest news is the IRGC Navy struck a bulk carrier, a cargo ship off the coast of Qatar. And this is the game that's going on with the blockade that's happening. The United States is attacking Iranian tankers that are trying to get out of this trade or get into this trade for most. Iran is attacking the United States. We've seen that the Iranian side said they attacked two destroyers — they hit at least two destroyers.

The United States rejected it, said that it didn't happen. And the United States is arguing that they hit five or seven speedboats, which was rejected by the Iranians. So it seems that they're talking about negotiations. Donald Trump is saying that we're going to reach some sort of agreement, but it doesn't seem that we are reaching anything yet. We're not getting anything through these negotiations because we don't know. Actually, we don't know what's going on behind the scenes and what is the level of these sorts of messages going to Iran and to the United States. But at least defining a framework, it takes a lot of time, in my opinion, to reach that.

#Patrick

But.

#Nima

In the meantime, you see this sort of confrontation, which may lead to a drastic or big escalation between Iran and the United States. Your understanding of what's going on?

#Patrick

Yeah, thank you, Nima. I think the first thing is how I look at this. I'll just explain my methodology — I really don't take on board anything seriously that's coming out of the U.S. in terms of... I take it

seriously, but not in terms of it being consequential to actual negotiations. I take it seriously in that these are signals that are coming out of Washington. Uh, the Trump administration needs to be seen to look busy, they need to be seen to be making progress, to be doing something, because the onus is actually — if you think about the situation realistically — the onus is on the United States to make progress on the situation as far as their position goes. The onus is not on the Iranians. The Iranian position has already been staked.

It's a much more straightforward position because theirs is a defensive position. And this is their territorial waters. This is their sea lanes, effectively, that they're managing, not the U.S. So for the U.S., for political reasons and also for their reputation internationally, they have to be seen to be making progress. That's the first thing. So a lot of these announcements from the U.S. are performative. There's also the additional element with the U.S. that it's now become kind of understood that many such announcements from the U.S. are being used to manipulate the markets, so that people — traders, institutional traders, people within Trump's inner circle, his family — are able to put options on things like oil and put in call options for the rebound in the market, stocks, et cetera.

So they're basically using announcements to play the markets — or the threat of a deal, the threat of peace, the threat of a resolution, or the threat of stability. I think that's one way you can kind of look at it. But there's no sincerity at all, and none of these are reality-based. That's the thing. But they're still real because they're strategic. And the U.S. is doing this in conjunction with military strategy. And it seems to me, just having watched this game back and forth for the last few weeks, that the United States has been running, ever since the Islamabad negotiations — the first round, when Steve Wyckoff, Kushner, and J.D. Vance showed up for a day and then left.

But what happened was that was the beginning of the U.S. testing the Iranians with different tactics, different sort of attack vectors, different things that they could do to see if they could find a weak spot that they could exploit and then take advantage of, and then try to leverage a weakness that Iran might have in defending the straits. So the U.S. is testing its military power. They're testing Iran's response to it. That's a big part of it as well. So they're, in a way, setting parameters. But eventually this is going to settle into a type of stalemate, if it hasn't done already.

So then that leaves the U.S. with the next thing, which is they have to decide whether they're going to escalate or not, and when they're going to escalate. So if you look at this latest claim by the U.S., they're claiming that there is a memorandum of understanding, a one-page MOU, which they've issued to the Iranians. And the Iranians have responded pretty predictably, saying that yes, there are draft proposals, we are looking at them. But then the U.S. is adding this extra condition, which is a deadline. So they're saying, oh, there's a 24-hour deadline for this last one. So my interpretation of this is — and they continue to do this — the U.S. continues to sort of impose these deadlines, whether they're 24 hours. They used to be a week.

Then it was like two weeks, 13 days. Remember a 67-day deadline last June that ultimately ended up being a bombing run by the U.S.? So now it's a 24-hour deadline. This is not serious negotiations. You can't, at this level, with this much at stake — the United States, unless they're just crazy in Washington and they're incompetent and insane, and I wouldn't rule that out either. But to me, it seems like, yeah, there's a bit of insanity and incompetence there for sure, quite a lot of it. But I don't think these are real. I think they're just performative, and they're just trying to keep the news cycle going on this issue.

The U.S. can't — it's going to be very hard for them to mount any kind of military attack in the next week, mainly because the Trump administration is planning to have a high-level meeting with a major superpower in China. So it's just going to become a lot more complicated because you can't predict what would happen once escalation takes place. So I just think, even from Trump's standards, that's a bridge too far. However, I wouldn't rule out the Israelis trying to preempt some kind of hostilities because they really don't care. As far as the Israelis are concerned, Donald Trump could cancel his meeting with Xi Jinping and that would be fine by them. They really don't care.

It's not an issue for Israel. And that's the other problem here, Nima, is that the U.S. has proven itself to be agreement-incapable. Okay, we have that. There's still a chance that somehow, over a period of time, some negotiations could net some positive interim steps that might lead to some kind of stability, at least in the interim, and that's very possible. However, the U.S. is not capable of restraining Israel. That's the problem here. And that's part of the facade of this media pantomime, that people are looking at the U.S. and Tehran and thinking it's between Trump and the Iranian government. It's not. It's between Trump, Israel, and the Iranian government.

But Israel reserves the right to stay on the sidelines, and Israel is not capable of not inserting themselves into the situation. If any such agreement is reached between the U.S. and Iran, there's nothing stopping Israel from inserting itself into that situation and just wrecking the whole thing and maybe even escalating it to a worse position than it was before. That's always going to be a risk. It's always going to be a threat lingering there. And for this reason, I don't think... I really don't see any chances of this working. It would take some kind of just drastic change by the Trump administration in its relations with Israel. And I just... for some reason, I can't see it. So it's going to be really difficult. And Trump will come out, you see, his statements are just, you know, completely incoherent.

And he's constantly undermining his own previous position, or his Secretary of State saying something different than him, and so forth. And he's saying Iran wants to sign a deal, that they want to sign it badly. And quite frankly, they want to sign it much, much more than we do right now. They're looking at this... None of this is true. This has proven time and time again to be just absolute public relations fiction. And he will just spit out anything. Once he gets off the helicopter, or

Air Force One, or standing on the White House lawn, as soon as the cameras show up and the mics get there and the questions start hurling at him, he then goes into performance mode. And he just goes into reality TV acting mode, and he'll say anything.

He'll say anything, like he'll make statements that are just demonstrably false. He'll make claims about Iran or the Iranian leadership that aren't true. He'll make claims about things the Iranians have said in private, which nobody can verify. We don't know who he's speaking to, or if he's speaking just to Steve Witkoff, and Steve Witkoff says he's speaking to a guy in Pakistan, and that guy's speaking to the Iranians, and they're speaking to the right people. Nobody knows. Nobody knows. There's no way to track or verify any of this. And for that reason, I'm going to say, Nima, that it is my very strong conviction and belief, based on what we've seen in the lack of progress over the last, say, four weeks, that Iran has shifted into third gear.

And I'll call that, I call that Ukraine mode. Iran has shifted into Ukraine mode. And I believe that's a large part of the substance of the conversation that they had with the Russians in St. Petersburg. In other words, how do we deal with the Americans? And I think the Russians gave some advice. Not that you have to give the Iranians any advice on this, because I think they know everything very well. They've been playing checkers with Trump now for quite a few months on this. But they're into this kind of mode because the U.S. needs time. So this is very similar to the Ukraine conflict. In Ukraine, the U.S. is buying time to arm its proxy, and it's buying time for the Europeans to rearm as well and to restock.

So the negotiations are going nowhere with Ukraine. And they haven't gone anywhere for the last year. At least, let's talk about this presidency. They've gone nowhere. And I think the negotiations with Iran are kind of entering that similar sort of mode, this Ukraine mode. And it's very interesting. Just look at how Russia is managing the U.S. and managing Ukraine. Putin just came out with a statement that said, I'm ready to meet Zelensky face-to-face anywhere, even in a third country. However, one condition: before we meet, there must be a comprehensive, long-term peace plan ready to sign. No, we both know, as long as Zelensky is president, that paper, that document will never show up.

So that's effectively what Putin is doing. And I think Iran's in a position to kind of do more or less the same, although they don't have to because, again, they're in the defensive position. And they don't have to run to go and meet the U.S. halfway at all. So just from a negotiations point of view and how frameworks are laid out and basic game theory, Iran doesn't have to go and meet the U.S. halfway on anything. But what they can do is play this performative media game back and forth with the U.S. because also it does suit Iran to buy time as well. I think we can all agree, Nima, that it's very likely, it's more than 50% likely, that there will be a resumption in hostilities between Iran and Israel.

#Nima

That would happen.

#Patrick

We can bet on this with a high probability, at least over 50%. And if that's the case, both sides are going to benefit from the additional time to reorganize and to rearm. But strategically, Iran has the upper hand. They've established the upper hand. It's clear they have the upper hand. It's a fact of geography, quite frankly. And for the U.S., it's just a logistical handicap that they find themselves in because the U.S. is in a much weaker position in the region than it was before February 28th. And that's a reality. So the U.S. had a much better hand militarily before February 28th. Now it's much weaker. And we can talk about the different aspects of the different Gulf states that point to that.

But these are just realities that you can't get around. These are like immovable objects in this equation. So much of this is media noise, but that's part of the challenge of dealing with this Trump administration — you've got to be able to filter out what is meaningful and what is completely just superfluous noise. And a lot of people are, some media are, kind of, I think, learning this and adapting to this. But then you have outlets like Axios in the U.S., which is effectively, you could say, in the mainstream sense, kind of an Israeli propaganda clearinghouse. So it's like an embedded Israeli mainstream foreign agent within the United States.

To me, that's the kind of role it fills. And it does U.S. politics, and they have real reporters there. But on foreign policy, specifically to do with anything Israeli-related, it's absolutely, I think, front-run by the Israelis, by Israeli intelligence. So that's also part of this media churn — the announcements and the leaks and the anonymous sources coming out of the Israeli outlet. I call it the Israeli outlet because, in my opinion, as far as the Middle East goes, it is an Israeli outlet, Axios, which is embedded in Washington, D.C. And that's just part of the general ecosystem of propaganda and strategy.

And the strategy, Israel's strategy, is to pursue its objectives in the region, but it's also there to nudge and to hem in the U.S. government and the Trump administration. And it uses its media proxies in the U.S., whether they're at Fox, whether they're at Axios, and they use those to act like a kind of sheepdog, to kind of corral and direct Trump into positions and direct the U.S. government into the positions that it needs it to be in at any particular time. It's a very well-coordinated operation, and most people have no idea how sophisticated this is. But this has been going on for decades, quite frankly. It's nothing new. It's just now you can kind of see it in action. You can see it in action more than ever.

#Nima

You know, with the case of the blockade and confrontation between Iran and the United States, what we've seen so far is that the Iranians are learning how to saturate the air defense systems of these destroyers, easily overwhelm the air defense system, hit the target, and sink these destroyers.

I think they have shown that without actually doing that to American destroyers, just to show how capable they are and to make the Trump administration understand what's at stake for them if they continue with this sort of attitude. Just yesterday, last night, they said that they're done with Donald Trump and this blockade. With each and every tanker being hit, Iran is going to respond the same way, and they're going to hit the tankers and the destroyers and the warships of the United States in the region. This was announced by the IRGC last night.

And on one side, you see this: Donald Trump is desperate before going to China to calm down a little bit the situation because he needs this, you know, to calm down, to have some sort of, you know, I would say a ceasefire, close to a real ceasefire, not the ceasefire we've seen so far. And once he gets back from China, that's, I think, as you've mentioned, when the escalation is going to happen. I think that's going to be the point when we're going to see the escalation. But the problem, Patrick, is looking at the war so far, who's gaining, who's losing? You know, the United States, before this war started, they didn't have the issue with the Strait of Hormuz. They had all those big, beautiful bases in GCC countries. And many of these people, pro-Western, you know, analysts in these countries were arguing that the United States is here.

Nobody should be afraid of anything if the war, you know, is going to be four days. If it takes more than four days, we're going to have the United States here. Those calculations are off the table right now. They know what has happened so far, you know, even in Saudi Arabia, in Qatar, in the UAE. Many of these countries are asking themselves, those pro-Western analysts or people, decision-makers in these countries are asking, what is the point of having the United States bases here if they're not even able to defend themselves against an Iranian attack? So I think the reality of what's going on, even with all these sort of, you know, with the case of bases, the war, what's going on, we're not talking about the main issue that the United States is trying to put and talk about — the Iranian nuclear program.

That's not on the table anymore. And I don't see China being willing to help the United States in this sort of thing, because I would say that Donald Trump would ask China to put pressure on Iran. One of the main objectives of this visit would be that, because they did that before with the case of Russia. But the problem is that the chessboard is not in favor of Donald Trump. It's totally against him, and he doesn't have any sort of leverage going to China. How is that going to be helpful for the United States to start the war once Donald Trump gets back to the United States? Because we know, with the case of ammunition, what's going on with the case of cruise missiles, the interceptors.

On the other hand, we learned yesterday that Europe is running out of jet fuel in six weeks. Look at the inventories of crude oil — it's just going down. It's unbelievable what's going on. And these are all pressures on Donald Trump and the global economy. It's not pressure on the Iranians, I would say. Iran is fighting. They know what they're fighting for. And these are huge problems that Donald Trump should consider in this meeting with Xi Jinping. Your understanding on how he is going to resume is he's going to, you know, bring all these issues to the table to talk with Xi Jinping.

#Patrick

I think this is going to be a very different meeting with the Chinese than Trump has had, or any U.S. president has had in history. Arguably, this will be a very important meeting. I mean, I can kind of discount that a little bit because, you know, even if Donald Trump sat in a room at a table with Xi Jinping, and Xi Jinping brought forth the most eloquent Confucian wisdom and geopolitical acumen and prose and poetry of international relations — infallible — it would go right over the head, right in one ear and out the other ear of Donald Trump. It's of no consequence, Trump being there in that sense.

What is of consequence here is that China is now viewing the United States of America in a very different light, because now Trump has shown openly what the U.S. is prepared to do in order to achieve its maximalist goals. And that includes the destruction of entire countries. That includes the destruction of a civilizational state. China is a civilizational state. India is a civilizational state. Iran is a civilizational state. The United States is not a civilizational state. The United States is a very young, modern, colonial settler state. It's not a civilizational state.

So for China, even the issue of preventing Iran from enriching any uranium — that is an attack on Iranian sovereignty. If China were to endorse that, uh... that's not a decision for Iran to make. If Iran decides to make that concession in order to move the ball down the field towards a broader peace agreement with sanctions relief and all the rest of it, fair enough, that's their prerogative. But China cannot necessarily endorse that, nor can Russia, because if they are, they're effectively saying that it's okay for the U.S. to impose that demand on them in the future. So it's really an attack on basic sovereignty, not to mention the Non-Proliferation Treaty and all of these other international frameworks that have created stability and predictability between not just nuclear weapons states, but states who have civilian nuclear power programs — which are many.

So from that point of view, for China, I think things have gone a little too far between the U.S. and Iran. And so it is very possible that you could see also stern words or implicit threats given to Trump from the Chinese in the nicest possible way that I think would change the United States' calculus vis-à-vis what it believes it can get away with in China, because the Chinese have been very sort of patient and they've been sort of tolerant to threats. I mean, during the Biden administration it was terrible in terms of Chinese relations. I mean, Nancy Pelosi getting on a plane to Taiwan, grandstanding in Taipei, Tony Blinken's disastrous summit with the Chinese, just the insults, the threats, and you had the neocons on the periphery as well, and the Marco Rubios from the Senate threatening China.

And saying that we're going to arm Taiwan with whatever it takes and we're preparing for a major pivot to the Pacific is like saying we want war. China is our enemy. Marco Rubio said they mean us harm. They mean us harm. I mean, where is all this coming from? So that's one thing. But now you can see what the U.S. is actually prepared to do. It's not just what the Trump administration is prepared to do. It's what the Democrats are prepared to do because they're not pushing back

against any of this for the most part. So the whole of the U.S. government, the media, and society is kind of—the majority are on board with this type of muscular, aggressive foreign policy. So I think for China, it's serious.

And the U.S. has explicitly said they want to use this situation in the Persian Gulf, openly saying this is going to hurt the Chinese economy. The byproduct of this, why it's a great policy, is because it's going to hurt China's access to the energy it needs from the Persian Gulf. That is an act of war. That's a threat of warfare against the Chinese by the U.S., even though it's indirect. So they've been playing this game with the Chinese for a very long time, and at some point, the Chinese elephant, which moves very slow, but when it lifts its foot and it puts its foot down, you will feel it. That's the difference between a power like that and the U.S. that's constantly flapping its wings and its gums and going hysterically on Twitter every 24 hours, making all sorts of threats and so forth.

China will sit back, assess the situation, but they could put their foot down during this meeting with Trump. And if Trump comes back with some sort of conciliatory, slight pivot in the rhetoric, perhaps, it would only be short-term with Trump, because even if Trump is faced with, you know... even if God himself came down and gave orders to Trump to back off, Trump would sort of nod his head, be scared for 24 hours, and then after the demons have been in his ears the next day or the day after, he'll be back to where he was before. That's what we know about this president. He doesn't have any strong principles. He has no moral framework. He has no intellectual depth whatsoever to realize the situation that he himself is in and what he's pulled the United States and the world into through his own actions and his own lack of constructive actions himself.

So it's no guarantee. Yes, it's going to be a serious meeting. Yes, strong words could be made from China towards Trump vis-à-vis what's happening in Iran and more broadly, globally, but with the economy as an example. But that's no guarantee that that's going to be an epiphany for Trump, because at the end of the day, he only reveres one demigod, and that seems to be his own ego. Unfortunately, I hate to personalize it, but sometimes it may come down to that. Not to mention the fact that whatever accord the U.S. reaches with China, Israel can undermine that. And the Israeli lobby in the U.S. can undermine any progress there, any progress at all. They can undermine that immediately. And Trump will be sort of back to square one after that. And I think that's predictably what may happen.

I will predict there will be some big things coming out of this meeting with China in terms of rhetoric, in terms of a signal of a potential shift for the positive, but I think after a few days it will be knocked back into its previous position, and the U.S. will just continue. So maybe their direct bilateral relations in terms of trade and tariffs and things like that might be somewhat resolved temporarily with China or look like they're going in a positive direction. But in terms of Iran, it's actually not in Trump's control. He does not get the final call. Netanyahu and the Israeli government have veto power over U.S. policy in the region. And that's just the reality of the situation. I don't see that changing. Until that changes, that's what's more likely to happen.

#Nima

You mean something like what we've seen in Anchorage, Alaska?

#Patrick

Yes.

#Nima

A lot of positive things happening, and it's going to be a game changer, and coming out of that, Donald Trump saying everything was amazing. It was all good and excellent. And after one week, everything disappeared from the scene, and we're getting back to the same old policies again.

#Patrick

Yeah, I think so. I think so. I think you can kind of see that the optics will be there for Trump. He'll want to cultivate any political capital from the photo ops of him with Xi, and it'll be great photo ops. It'll be fantastic. China knows how to craft a state visit better than anybody, so it'll be fantastic. But you can't change this fact that Trump's reputation as a president, while he got elected, is he convinced the American people that he is the master of deal-making, that he is the art of the deal, and that's his brand. But the reality people need to understand—and he still trades off that mystique with Americans—but the reality is he's not able to make any deals internationally. And he's made none.

He's made no deals because you don't do deals in international relations. Trump believes that he can redefine international relations just based on the force of his character, and his brand, and his marketing approach to what he sees as international relations, which for him is really just transactional interactions with other leaders—not even governments, other leaders. So the U.S. government is not locking in with other governments to get agreements and to draft accords and to formulate agreements. They're not doing that. It's just his singular executive leadership position, and he's interacting with other leaders, some of whom have a mandate, others who don't—prime ministers, presidents, et cetera. So there can be no agreements.

There can be talks of deals. There can be draft deals. There can be tweets about deals. But deals are not what stick in history in international relations between countries. It's much more complex than that. Because Trump doesn't have the ability to understand this, or the appreciation of history. And because he has surrounded himself—and the Israeli lobby have appointed—a whole gaggle of amateurs and charlatans around him, and people who are highly compromised and also highly corrupt, there's no incentive or ability for anybody to engage in actual meaningful international relations, which means that there'll be a lot of talk, there'll be a lot of spinning of the wheels, but nothing's going to come of it.

And I'm sad to say I've been watching this roadshow, this pantomime of a diplomatic roadshow now for a year and a half, and I have seen nothing of substance. I've seen a lot of show. I've seen a lot of fake initiatives. I've seen the Board of Peace. What happened to all the money that he managed to bill for from the board? We're talking billions of dollars. What happened to it? Where is it? And that's just one example of many—wanting to privatize the United Nations with the Board of Peace. I mean, what kind of a scam is that? So when he believes, and the U.S. believe, with this type of mindset, that they can negotiate with the Iranians while they have their hand on the Iranians' neck.

And they press the boot on the neck, either through blockade or sanctions, and then ratchet it up during talks and things like that. And we already saw they're willing to mount bombing raids, full-on war, military strikes during negotiations. Because of this insistence that they have to have increased leverage, like a vice grip squeezing during negotiations. You cannot have any serious negotiations with any real country if you do it this way. It's just impossible. And the Iranians now understand, and Russia understands this.

And so Russia's been playing the performative game diplomatically with the U.S., and meanwhile, they've quietly and methodically been getting on with their sort of, you know, program, if you will, to achieve what they need to get in the long run out of the situation around the Black Sea. And likewise, Iran is settling into a similar mode as the Russians, where they're not expecting anything of substance from the U.S.—nothing. It's all performative. And I think this is a dangerous thing for the U.S. to get involved in, because can they outperform Iran on the global stage playing this game, this performance? I don't think so. I think one thing Iran has shown is that it's won the PR war between the West, the U.S., and Iran. Iran has won the public relations war.

They're winning the media war with very little in terms of resources. But what Iran has done is crowdsourced. With the global community, they've crowdsourced their sort of media leverage. And so if they want to play this performative diplomatic game with Iran and the U.S., the U.S. is going to lose, and it's going to lose badly. And the price to pay at home for Trump is high. It's going to be very, very high. His legacy, I think, is just finished. He'll never recover. He will never reach poll numbers again, even approximating those he had when he came into office a year and a half ago. It's just not going to happen. The economy is continuing to tank. That can't be undone. And you're just looking at a real bunch of amateurs, just very disorganized, very sort of high on their own fame and clout.

We're talking about Trump. Scott Bessent has destroyed, effectively destroyed, the U.S. economy through the tariff wars, which they had to repeal. They're giving refunds on the tariffs because it collapsed. It's a total failure, but the media is afraid to cover it too aggressively because a lot of the media are afraid of the White House and the repercussions. So the tariff wars were a failure. The sanctions have been a failure. Everything they're doing vis-à-vis Iran is a failure. Just the Treasury Department, Scott Bessent, insisting on pressing these sanctions on Iran—it's not going to incentivize Iran to do any kind of political settlement. It's a threat. It's, again, squeezing the neck during negotiations.

It's counterproductive, and that means that it's going to be counterproductive to the global economy, to the global energy supply chains, and to the U.S. economy. So the U.S. is undermining its own economy during a midterm election year. It's absolutely insane what's going on. So, like, who's pulling the strings here? This isn't America first. This has to be Israel first. That's the only logical explanation. Why would the U.S. government destroy its own economy, destroy its own military, put at risk all of that, gamble all of that? Why would it do that? I mean, how could it possibly do that? You have to be very incompetent and stupid, and a bit insane, or you're doing it on behalf of a completely separate foreign interest. That's the only logical explanation at this point because it makes no sense. None of this makes any sense on paper, logically speaking anyway.