

John Helmer: Iran Goes All In – China's Trump Bombshell & Russia Closes In

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#Nima

Hi, everybody. Today's Tuesday, May 19th, 2026, and our dear friend, our brother John Helmer, is here with us. Welcome back, John.

#Guest

Thank you for having me. It's good to be back.

#Nima

John, let's start with the meeting between Donald Trump and Xi Jinping. One of the main objectives of that was the case of Iran and the Strait of Hormuz. There are many reports on that meeting. You know, you have the American side, you have the Chinese side. You put these two statements together — they're not even comparable. They're totally different. What was happening? Let's start with the case of Iran. Donald Trump wanted something important. He wanted something from China. What happened during that meeting, and what was the outcome of that for Donald Trump?

#Guest

Well, bearing in mind I'm the Russia correspondent, right, and so I sit somewhere differently. Let me turn to my right and pull up the documents. So bear in mind, folks, we depend first on what we read and second on what our sources tell us about how to interpret what we read. So what we have, what I'm looking at here, is the White House fact sheet, which was produced on May 17, so Sunday, after Trump came back. And the crucial proposition, the paragraph, I'll read it out: both leaders agreed Iran cannot have a nuclear weapon, called to reopen the Strait of Hormuz, and agreed that no country or organization can be allowed to charge tolls. President Trump and President Xi also confirmed their shared goal to denuclearize North Korea, taking that apart.

#Nima

The toll system, John — by the way, the toll system was not mentioned in the White House statement. They mentioned it somewhere else. In the official statement of the White House, there is no mention of the toll system that Iran has. Correct. In the Chinese statement, they didn't mention that. Go ahead.

#Guest

Well, you're quite right. Of the several points, what Trump has said in the White House fact sheet is only half true. It's that kind of fuzzy description. Both leaders agreed Iran cannot have a nuclear weapon. Well, actually, the Chinese position is no nuclear weapon for Iran in the context of a denuclearization of the Middle East and in the context of Iran's compliance with the Nuclear Non-Proliferation Treaty, which, in parenthesis, unsaid, Israel does not comply with. So that's one thing. The same Trump-type lie is the quote "shared goal to denuclearize North Korea." Yes, both sides can agree on that because the Chinese side is we will denuclearize the entire peninsula so that North Korea is not threatened either by U.S. bases in South Korea or by the rearmament of Japan.

So both those things are fuzzy and misleading and deceptive. Then the question is, reopen the Strait of Hormuz. China has already Wang Yi, who does most of the talking for Xi, because Xi doesn't do much talking at all publicly. China's agreed to reopen. The question is, on what terms? So when, this is the big question mark — you raised it, and it's correct. No country or organization, that's a reference to the IRGC, can be allowed to charge tolls. Now, that's what Trump says he said. That's what he says they agreed. Did Xi agree on that? We don't know. Trump says he did. So one of the interesting questions is, let's hear from China. Did they say that or not? So then we have another follow-on from what the White House has said.

It's the headline running in London and Washington today that U.S. officials allegedly privy to the meeting between Xi and Trump claim that Xi said Putin may come to regret the special military operation, meaning China does not endorse either the opening of the special military operation or the root causes of the special military operation or the current position — the military position, the negotiating position. In other words, there's a propaganda thrust. It's quite clear. The Financial Times of London is a Japanese-owned propaganda platform using an English newspaper, the Financial Times, to argue its case, argue the Japanese case against China. China's the principal enemy of the FT because it's the principal enemy of Japan.

So there are two points we're left with. They're good questions. What exactly did Xi have to say about the Strait of Hormuz toll as part of the Iranian terms? Second, what exactly did Xi have to tell Trump on the Ukraine negotiating terms? The answer is, and we could say, and a lot of our colleagues on podcasts will say, this is all an invention. It's Western propaganda. And certainly it comes from Trump's mouth, Stephen Miller's editorial department, the tweet section, and so forth and so on. And there's no doubt there's an attempt to divide Putin from Xi, Xi from Putin, as the Russian-Chinese summit begins tomorrow, in a few hours' time. However, let's hear it from the Chinese. Or, put it another way, what are we to understand Xi didn't say?

Did Xi warn Trump not to expand the war against Iran? After all, our audience all knows, and you certainly know, that Trump announced he was planning to attack Iran tomorrow. What are we today? Tuesday today. And only out of his good faith and the prevailing requests of the Saudis, the Emiratis, and the Qataris did he decide to put it off because a good deal could come. Well, leaving aside the juvenile poker-playing meaning of such a statement, the fact is, did Xi tell Trump China does not support reopening of the war? That's the first question. Second, did Xi say, I think you, President Trump, should bring the war to an end in Ukraine on the terms that Russia has tabled?

Did he endorse those terms? I would say, and our audience is free, those of you out there who want to support Xi and Wang Yi, that it's unfair to put in their mouths what they didn't say, because they're so sophisticated and so secretive, they're playing multiple games, blah, blah, blah. I'm prepared to accept anybody who tells me that I have misunderstood what the Chinese didn't say. What I'm saying is, why not? Why haven't they said clearly what they mean? Did Trump walk away from Beijing thinking he has a free hand to inflict a new round of destruction on Iran? Or did China say something to deter him? We could. And the rest is our imagination, isn't it? Yeah.

#Nima

But Donald Trump's position on the Strait of Hormuz, I would argue, if Donald Trump could have had something with Xi Jinping or some sort of acceptance or some sort of move from Xi to help him, he would have announced it. It would have been a huge victory for Donald Trump, and you would read it everywhere in the mainstream media. That didn't happen. That shows how disappointing that meeting was, in my opinion, because they're not bragging about it. The statement was, as you just mentioned, the statements on the part of China and the part of the United States, they're not even comparable.

They didn't, you know, the White House statement didn't mention the case of Taiwan, which was one of the main issues. Yes. This is the problem. I think they didn't get anything. China, as it was reported in The Atlantic, they said that Xi humored Donald Trump. That's the whole thing that happened in China. He tried to put a lot of things together to make Donald Trump feel so good being in China, but nothing of a strategic sort of, you know, achievement was made by Donald Trump during that meeting. What was the achievement of that for Donald Trump?

#Guest

A bit more than zero, but not much more. I mean, let me give you some examples. To take the fact sheet as a brag sheet, yes, this is the best that Trump could come up with as his achievement. I'm not disagreeing with you. I'm simply saying let's look at what their brag sheet was. And you're right, he doesn't brag that he got an endorsement from China to do anything to anyone else — not Trump, not to Iran, not to Cuba, not to Russia, and no mention of Venezuela. So that's one point. We'll come back to that point in a minute when we talk about what the Russians are proposing to sign as

an agreement of principles of multipolarity. Let's come to that in a minute. The brag sheet says that the two sides are going to establish a U.S.-China board of trade to allow the U.S. government — and I'm reading it — and the government of China to manage bilateral trade across non-sensitive goods, and a board of investment to provide a government-to-government forum for discussing investment-related issues.

What that means is we didn't agree on any significant trade issue, but we've created a board of trade to go on talking. Well, there's nothing new there. A board of investment? Well, Trump, you remember, said, I'm going to bring hundreds of millions of dollars' worth of Chinese investment into Russia. But in fact, China offered nothing. I'll come back to exactly what they offered in a minute. And so they've created a board of investment to talk about it. So there's a very limited statement: China will address U.S. concerns regarding supply chain shortages related to rare earths and other critical metals — in other words, minerals. There's no agreement. No agreement. They'll go on talking.

That's not an achievement of Trump. It's, let's say, an achievement on the Chinese side to keep talking and mitigate the number of threats that come out of Trump's mouth. So on the rare earths and sensitive minerals, no agreement either. Then what does Trump's brag sheet have to say? Initial purchase of 200 American-made Boeing aircraft for Chinese airlines. Well, 200 sounds like a lot, and they're not cheap, but the market and Boeing were thinking the number would be 500 Boeing aircraft. And if you look at the market's reaction, Boeing's stock price has dropped 5% to 8% since the Chinese said, we'll give you 200, we'll order 200, but we won't order 500. So let's call that mostly a Trump defeat, which the market recognizes.

So what's left? China will purchase, I'm reading, at least \$17 billion per year of U.S. agricultural products in 2026, 2027, and 2028, in addition to the soybean purchase commitments it made in October of last year. Well, I've looked up the numbers, and this actually represents less Chinese commitment to buy U.S. soybeans and U.S. agricultural products than the peaks reached during the Biden administration and the Obama administration. So if anyone wants to look at the big numbers — and they're big because China eats a lot and is a major buyer of U.S. agricultural exports — the fact is Trump achieved less than Biden and Obama. That's something you won't hear him say, will you?

So I agree with you. On balance, it's been a dud. The bombshell that Trump says he achieved with respect to Iran, with respect to the Hormuz, and with respect to Russia in today's propaganda from the FT and in Washington — they're zero. There's zero explosive yield. There is zero impact there. So we could say, positive for China, Xi wins. On the other hand, we could also caution by saying, did Xi deter Trump from escalating in Iran? Did Xi encourage Trump to come to power, to limit the escalating war on the Ukraine battlefield, the drone war that's entered Russia in a uniquely new way? And we can't answer that. We'd have to say we don't know yet.

#Nima

I think when it comes to the practical sort of moves on the part of China, Donald Trump seems to have, you know, he asked China to buy more oil from the United States. One of the main reasons is because he wanted to put pressure on Iran, reducing the oil received from Iran and receiving more from the United States, somehow replacing Iran in the case of China. And the other point was the soybeans replacing Brazil. And I think, considering these two points, Donald Trump has achieved nothing. I don't know what China can do practically to deter the United States in the Middle East. I don't see Iran talking about this. Iran doesn't need that. Iran needs China supporting Iran. What does that mean?

I think the same way they had the relationship before this war started — receiving Iranian oil, having a normal relationship with China. Even, I would say, behind the scenes, we don't know what's happening behind the scenes, but I believe there is a lot going on behind the scenes between Russia and China, between Iran and China. But nobody's talking about that. But I would say there is something big going on because we have the head of the Iranian parliament being right now in charge of Iran-China affairs. This is a huge change. We haven't had that before, John, since Ali Larijani, the former head of the Iranian National Security Council. When he was the head of the Iranian parliament, he occupied that position.

Since then, we haven't had such a thing. And right now, this move on the part of the Iranians — the head of the Iranian parliament, the head of the delegation, by the way, which had the talks between Iran and the United States in Islamabad, in Pakistan — right now is the head of Iran-China affairs. I would say there is something big going on between Iran and China. I don't know what that is, how deep it is, and what the main components are of this sort of new attitude on the part of Iran and China. But there is something that is not on the surface, that we're not talking about. And that's why I think China disappointed Donald Trump in his recent visit to China.

#Guest

Well, I can agree with all that you say, Nima. I should think, expressing what China might say or could say publicly in the way they say it, what one would look to is a statement that since China has, like Russia, like many countries, explicitly criticized the U.S.-Israeli war against Iran as unprovoked, unlawful, in violation of the Charter of the UN — violent aggression that has no justification. Since that's been China's position — Wang Yi said it, and other Chinese officials have said it — since that's their position, it would be quite feasible to say that since this was an unprovoked aggression, the damage done to Iran needs to be compensated.

And so the reparations issue, China might say, needs to be addressed by all the parties. I think that would be expressed in language that's general enough in the Chinese style. That would imply addressing the Hormuz toll, because the Hormuz toll addresses the reparations issue. It also, the Hormuz regime, addresses Iran's right to sovereignty and self-defense, and so forth. So there is, with respect to the Hormuz Strait regime and the toll, the reparations principle, which China could

say but has not yet. And second, there's Iran's right to sovereignty, independence, and self-defense, such that the Persian Gulf and the Strait of Hormuz do not become spearheads for further war against Iran.

China's accepted the principles, but has yet to tie the issue of Hormuz to those principles. But it could do so. It hasn't said so yet. So both of us are saying the same thing. We don't know, and it's foolish to imagine or project wishful thinking that China does one thing or another. But on the other hand, what we are able to say is what it could do, what it hasn't done yet. And I've just suggested two things in which they could address the Hormuz Strait without appearing to address it, in consistency with the principles they've adopted already.

#Nima

You know what's so important? The day before the meeting between Donald Trump and Xi, China paid Iran for 30 tankers passing through the Strait of Hormuz under what they call an administrative and environmental fee. Yes. I don't know what else they can do. I totally understand your point that China is not vocal about what they're doing and what the main objectives are on their part. But we haven't heard that much about the meeting. We don't know what is going on. Let's see what happens during the meeting between Vladimir Putin and Xi. I think we're going to learn a lot about what has happened and what the position of China would be when it comes to Ukraine and the Middle East. And how do you feel about the meeting between Vladimir Putin and Xi right after the meeting and the summit between Xi and Donald Trump?

#Guest

Thanks for raising that question. And we'll try to link our answers to the earlier question of Xi and Trump. First of all, the most important way of looking at what's about to happen in Beijing is a significant shift in context in Russian public discourse. And there's no doubt that my sources have been saying it for some time, and I've had enough exposure to Russian-Chinese business to understand. There's longstanding suspicion on both sides of just about every business transaction or investment transaction you can think of. Notwithstanding, you have this vital strategic trade between the two states and investment and partnership to offset the damage Russia's suffering from its isolation by the United States, the European allies, the UK, and NATO from the rest of the trading world. That everybody understands.

But within the public discourse over the last few days, there's been significant public discussion. I'll just read you what it turns out you could understand to be an editorial line from a state flagship medium, RT, that says, quote, "China still often behaves as though it can enjoy the benefits of strategic partnership with Russia without fully committing itself to the burdens that come with it. Moscow has already integrated Beijing deeply into critical sectors ranging from energy to logistics and food security, but many major Chinese investments and technology commitments continue to move cautiously or remain delayed. At some point, Beijing will have to decide whether it truly views

Russia as an equal strategic partner or merely as a useful resource base." Now, we've been discussing this before.

There is a line of Chinese analysts, Chinese ethnically, based in China, who do think of China as a hegemon, as a co-hegemon with the United States. And they do think of Russia as a subordinate. There's no doubt about that. One. Two. There is no doubt there have been, and we've been talking about it for some months now, public disclosures, very discreet on Foreign Minister Lavrov's part, of significant strategic disagreements with China when represented by Wang Yi, the Politburo member, a much more important figure in Chinese policymaking than the Foreign Ministry he occupies. He's been meeting with Lavrov since December, and the Russian side have been airing the view that there's some deep disagreement, but it's not clear what it is. So now we have, on the eve of Putin's visit, the airing of Russian, how to say, dissent that China is not making commitments.

I've no doubt that on the Chinese side, there's also a Chinese view that Russia's not quite to be trusted to meet its commitments. So what we have is a very unusual briefing in detail by Yuri Ushakov, the president's foreign policy advisor, former Russian ambassador to the United States, a foreign ministry man basically, but also the spokesman for President Putin. Now, he doesn't usually brief in advance in the detailed way in which he has in the last 24 hours. It can be read in TASS. I'll put it up on my website so that those who want to read us instead of listening to us can see exactly what he said.

First of all, he said, and this answers your question directly, there's no link between Putin's visit this week and Trump's last week. There's no doubt that that's mostly true in the sense that the visit schedule between Xi and Putin was already well underway. And there was to have been, I think, if I remember the dates that were talked about tentatively before, Putin's visit to Beijing this May was to have been last week. It was kicked into this week because Trump barged in. And clearly, he had a priority to do that. And that's the way it went. But there isn't a link. Putin isn't going to China because Trump was there.

Both of them were going to China. There are two other head-of-state visits this year already agreed. I believe Xi and Putin will meet at another summit later in the autumn, in the fall, and then they will meet again toward the end of the year. So there is a schedule. It's been underway. There's no particular link. However, as you obviously understand and asked, because he's going, Putin is going, the issue is what will look different from the way he's received, from the way Trump was received. First, Wang Yi will be on the receiving line at the airport. That's very significant.

#Nima

Big, big difference.

#Guest

Yes, it's a big difference. It's not a protocol greeting. We're going to get down to business the minute you get off your airplane. Fine. Second, Ushakov reveals that the Russian delegation will be very large. I'm looking down at my paper so I can tell you that there'll be five deputy prime ministers, including the energy prime minister, the industry prime minister, the central bank governor, Nabiullina, the foreign minister, the agriculture minister, the culture minister, transport. It's very serious. It's more serious than the business contributors that Trump brought along. Ushakov has not identified the Russian business leaders, but you can be sure Rosneft and Gazprom will be there.

On the issue, and this is the key business issue that's fundamental, so we'll spend a little time talking about it. Agreement to build and start delivering gas to China along the Power of Siberia pipeline number two is either to be finalized now, or there'll be a disagreement that's being delayed. The issue is delaying disagreement since a memorandum of understanding was reached and announced at their last summit. That's got to happen, and therefore, I suspect it will. But I'll explain to you in a minute what it means and the limitations. But I'll just say, Ushakov said, I won't go into details now, but I believe the topic of hydrocarbon cooperation will be discussed in great detail with the participation of direct representatives who are involved in all these projects.

The Power of Siberia 2 gas pipeline will be discussed in great detail. It's on the agenda. Then, says Ushakov, President Putin and Chinese President Xi Jinping will adopt a, quote, "Declaration on the Emergence of a Multipolar World and a New Type of International Relations." Okay, so the two sides are going to try and say, we represent together a multipolarity that—and then Ushakov repeats the line—"We are not allying against anyone, but are working together in the name of peace and everyone's prosperity." Well, that's apple pie and motherhood expressed in a Sino-Russian way. However, everybody understands that they are allying against the United States.

The United States is at war with Russia on the European battlefield, and it's at war with China as it remilitarizes. But we're saying it differently. So we'll have a declaration on the emergence of a multipolar world to, as it were, continue the expression of the BRICS ambition without the BRICS reality, which the Iran war has severely damaged, as we've discussed before. So shall I get quickly to the Power of Siberia problem, the Power of Siberia gas line problem? The gas line is the second pipeline. The first Power of Siberia pipeline is currently delivering. It had a capacity of 38 billion cubic meters. They've extended it to about 44. I'll explain why the numbers are important.

The Power of Siberia pipeline number two is 2,600 kilometers, but its capacity is only 50 billion cubic meters. You put the two together and you've got 94, let's say 100 billion cubic meters. But guess what? Gazprom was delivering to the European Union before all the troubles began, at peak between 175 and 180 billion cubic meters. So Gazprom and Russia are very concerned to build this pipeline and start delivering, because even at maximum capacity of both pipelines, they're not delivering more than about 100 billion. They're still 50 to 75 billion cubic meters short of what Russia was delivering to Europe. So those numbers tell you the strategic trade investment stakes. Now, we are not clear. Again, we have to emphasize this is a program of investigative journalism.

It's not wishful thinking. We believe that they will agree on terms, but there have been a number of things that have delayed the negotiations. One was the routing of the pipeline — that's been solved. The second is price. The third is volume. There is nobody who can tell you, and I don't pretend to tell you, what has been agreed on price and volume. One can read in Bloomberg and in the energy media, all of which have a propaganda purpose for or against China, for or against Russia, that the two sides haven't been able to agree on minimum volume deliveries yet — minimum. In other words, are the Chinese saying we will be committed to take or pay? And what would be the volume of take? Because you can't invest in such an expensive piece of infrastructure without generating the revenue to pay off the debts and so forth and so on.

And Russia must deliver this extra 50 billion because there's all this gas that doesn't go to Europe anymore. All right. So that's what's at stake in terms of what's the price. China has always, in my experience of Chinese-Russian negotiations and aluminum trading — and I reported a lot about it, I witnessed a lot of negotiations — fundamentally, the Russian approach is maximum plannable commitment for the future volumes, so that the Russian side can plan ahead what its revenues will be and its market capacities to deliver. The Chinese want to be extremely flexible on price. They want to peg price to spot price for international market purposes. They don't want to commit to long-term price, even if they commit to long-term volumes.

So there's always a natural difference, commercially speaking. This is a normal business commercial disagreement on flexibility of price, flexibility on volume that you have to put into a contract. There's nothing special. There's nothing political about that, except both sides are facing a war of power — more than one. So that's what's at stake in finalizing the Power of Siberia 2 pipeline terms. Will they agree on the contract terms — price, volume, and related factors? If they can't, how will they dress up what they have agreed on, and how will they explain what they haven't? So that's why it's central. And that's, you can understand, Nima, from a Russian point of view, this is urgent. It relates to Russia's economic future.

And so what we're seeing is a huge display of the Russian government, each of whom has to be matched by his counterpart on the Chinese side, and each of whom is going to try and sign a piece of paper that adds to concrete trust. That's what's going to happen. Now, in that, you've asked, what are the two sides going to say about the two wars? Iran war? Ukraine war? War in the Middle East? War in Europe? And would they even bear mentioning the fate of Cuba, which both sides, China and Russia, are making words about, but not exactly saving Cuba from the destruction — the ultimatum that was delivered last week by the CIA director who arrived in Havana. We can be sure they will touch on it, but the two wars, Iran and Ukraine, they have to be the priorities. Have I answered your question?

#Nima

I think I will get back to Cuba because it's so important. It seems that the United States is going to do some sort of operation in Cuba. But before getting there, John, I think when it comes to the Middle East, the situation — we've learned about the non-aggression pact. Saudi Arabia is talking about a new sort of pact in the region, which, looking at the region and the two important projects — one on the part of China and the other on the part of Russia — the North-South Corridor, and we have the Belt and Road Initiative. Both of them are dependent on the security and the future of the Middle East. And with the new changes, John, with the Strait of Hormuz, it's not just about oil and gas and fertilizer, all of that. We have a new element right now in Iran — they're talking a lot about it — the internet cables passing through the Strait of Hormuz.

This is, I would say, each and every leverage Iran could have had before this war started, because Iran was—many people were talking about these things before this war—but the United States forced Iran to go in that direction. Right now, they have this leverage in the Middle East, and Arab states, they have no choice, in my opinion, but to have some sort of agreement, some sort of pact, as they call it, a non-aggression pact. And how is that going to change the security of the region in the eyes of the Russians, in your opinion, with these two huge projects? I would assume that Putin and Xi would talk about these projects and how they would see—they want to see—the future of the Middle East in the eyes of, you know, a better and more prosperous region for their projects.

#Guest

Let me try to answer both, piece by piece, and I might have—I'm filling the piece that might have dropped out of my head. First of all, there are three corridors. There's not just the North-South and the Belt and Road. There's IMEC. We've talked about it before when India was a bigger player. India took itself out when Modi and Jaishankar, the Prime Minister and Foreign Minister of India, threw their lot in with the Israeli-American attack. IMEC continues to be pushed by the Israelis, and the Israelis think that the UAE is also on board for IMEC — India-Middle East corridor to Europe from UAE across to Saudi Arabia, up through Israel to Cyprus and to Greece, and from Greece into Central and Western Europe.

IMEC ought to be dead now. Why? Because Iran has demonstrated that it will oppose any alliance between Israel and the Emirates, Israel and Saudi Arabia, in continuing a long-term permanent war against Iran. So by, as it were, taking the Hormuz regime as part of Iran's long-term guarantee of peace, not war, IMEC can't be implemented — not at the Gulf, not by the UAE, not by Saudi Arabia. So Israel can go on integrating as they are doing. Israel is occupying Cyprus now, is occupying Greece. It is taking over Crete and the NATO facilities there, and so on and so on. I don't think our folks want to hear me go on about Cyprus and Greece, but it's important that IMEC has reached a dead end at the Hormuz.

If it's at a dead end at the Hormuz, it doesn't matter what Israel, Cyprus, and Greece get on with together. So we have three corridors, three, as it were, giant projects. Let me say a couple of things

about the North-South Corridor, which has been an ambition, a strategic ambition on the Russian side for almost the time since '89, since I first came to Moscow. I remember talking about it with Iranian officials years ago in Moscow. The North-South Corridor is now a significant lifeline for Iran's resupply from the Russian end. And I picked up today—and I'm looking for my piece of paper—the current shipping data show a 65% increase in Russian cargoes moving south down the Caspian Sea to Iran in the first quarter of this year compared with the year before.

So the North-South Corridor using the Caspian Sea is now of strategically far greater importance to both Russia and Iran than it's been in the last 25 years of discussion of the North-South Corridor. And it's central to Iranian resupply. It's central to protecting Iran from the blockade the U.S. wants to enforce against Iran's economy, Iran's ability to feed its population, and so on and so on and so on, not to mention military resupply, which is also moving down the Caspian Sea. Okay, so the North-South Corridor has strategic value for Iran's self-defense, and Russia is clearly, from the shipping data, showing it's doing that.

I haven't got railway data for the movement of Russian cargo through Turkmenistan into Iran through Turkmenistan. I haven't got other rail data or air data. Obviously, there's much greater limitation on air movement, but sea and rail are increasingly important for Iran's long-term survival. We also know that China has the capacity to send by rail to Iran westward, also through Turkmenistan, significant resupplies, both of a defense kind and of an economic security kind. So that's bound to come up. So I agree with you. These projects are more than simply, let's say, long-term geopolitical opposition to and competition with the U.S.-Israeli ideas of how these corridors should work. True. What else have I not answered in your questions?

#Nima

I think the other point would be the pact that they're talking about, the non-aggression pact. How do you see that happening, John?

#Guest

Well, thank you for reminding me. I apologize for forgetting. Russia's had, for more than five years now, a proposal on the table, which the foreign ministry presented some years back for Russian mutual and assured reciprocal security for the Persian Gulf region. Left out was Israel. So to have a new mutual security pact that involves the Arab states with Iran, this was anticipated by Russia, but not adopted by the—certainly not by the UAE, which, let's be clear, has aligned itself both with Israel and India in attacking Iran. The divisions between the UAE, Saudi Arabia, the Gulf sheikhdoms, and Iran are obviously at the point of war. They are part of the current war.

So a mutual non-aggression pact would be to follow the Russian outline, and it would be a distinct improvement on the present situation. But if Saudi Arabia is proposing it, there's no guarantee that the UAE will go along. They're competing now strategically, militarily, territorially. And the UAE is

trying to forge its own Israel-India axis for the corridor and also for military purposes. So a mutual non-aggression pact between the Arab states and Iran would be basically half the solution. Iran said it needs also the withdrawal of U.S. bases. So an Arab offer of reciprocal and mutual non-aggression and long-term security would require that the U.S. does not resume the bases that it's evacuated from, that have been attacked and destroyed.

Would you agree? That pact would have to mean something that the Saudis have never contemplated since Abdulaziz in the 1940s. The view of the strategic survival doctrine of all the sheikhdoms has been, first, that the British would protect them from each other, preserve the regimes from their internal tribal and religious divisions, and from Iran—or before Iran, from Saddam Hussein and from the secular threats, Arab ones. So it's difficult to see that the Saudis would agree to give up U.S. bases, which were installed there first as the spearhead of the strategic bombing campaign that was being planned by the United States Air Force for nuclear attack against the Soviet Union.

That's what the Arab bases were for. Originally, back in the 40s and 50s, the line the U.S. actually delivered—I've read the papers—to the Saudis was: you accept our basing in Saudi Arabia, we will protect you, but if you don't agree, we will consider that your oil fields might be blown up by us if you misbehave with the Soviet Union. It was as clear as that. So it will be very difficult, wouldn't you say, for the sheikhdoms to accept the non-return of the United States to its bases. That would be regime-based. Could it be a game changer that the House of Saud would accept that it would rely on Iran's signature on a pact to be better protection for its continuing rule than the U.S. bases? I find that hard to believe.

Therefore, we're talking about what terms Iran would accept. If the return of the U.S. bases isn't part of it, how can such a pact assure what Iran needs? A guarantee against future resumption of war. A guarantee that the Israelis and the Emiratis and others won't go on plotting what they've been plotting. What does this little episode of the secret Israeli forward base in Iraq mean? Well, what it means is the capacity of Israel and the United States—because the U.S. knew all about it and approved it in advance. This would be an Israeli strike base to conduct special decapitation operations, special forces operations against Iran last June. And it was used for that purpose. Okay?

Now, I mentioned the case because it popped up in the Moscow press yesterday in a very interesting way. If there's to be a pact of mutual non-aggression, Iraq is one of the signatories. But if Iraq can't control its own territory, because the U.S. de facto controls part of its territory with Israel, its signature's worthless. That would be another problem for such a pact. Pardon me. What happened in Moscow yesterday was quite interesting, let me tell you. The story. All of a sudden, the discussion of this base, which was removed in southwest Iraq after the June war—it would no longer serve the functions—what was reported by Evgeny Krutikov in Vzglyad. Vzglyad's an important internet platform supported by the Kremlin for discussion of the most serious economic, trade, and military security issues facing the Kremlin.

It's a very important platform for listening and arguing the options. In this particular case, Krutikov, who had a career in the GRU, the military intelligence organization, has GRU sources, has discussed what this base was and how it got there. He makes no bones about the fact it couldn't have been there without U.S. approval, but the Iraqi government never knew. He makes the conclusion that a state, an Iraqi state, doesn't really exist if such a thing can happen. What he's also saying but doesn't say is the Russian side must have known. And if the Russian side, the GRU, the military intelligence service, knew from its own satellite coverage, which was dense at the time in the run-up to the June war and subsequently, if Russian military intelligence didn't know, that's a catastrophic disclosure. But that's not what happened.

Russian military intelligence knew, so why weren't Iran and Iraq informed by the Kremlin? That's the real meaning of the story of the phantom Israeli base in Iraq from the Russian point of view. What's Krutikov saying? The Kremlin didn't allow the sharing of that intelligence with either Iraq or Iran. Iran at the time—if Iran had known, it would have attacked the base, right? Okay, so I just tell the little story for all the, let's say, factors that come into answering your question. Can an Arab-Iranian pact now work without U.S. commitments on the ground, meaning no U.S. bases? That's been a clear statement of Iranian terms. Mostafa Khamenei made it clear in his first speech. It's been repeated. There's no change in that. I don't see, therefore, a pact of the Saudi type succeeding either with Iran or with the United States or with the UAE. Do you? No.

#Nima

When it comes, John, to Saudi Arabia, you mentioned the case of the American bases in these countries. How do you see the role of the Pakistani government? Because we have a military agreement between Saudi Arabia and Pakistan. And I would say Pakistan is so much connected with Iran and China, and they're trying to do something together with Turkey. Does it mean that we're going to see something bigger than what we're looking at right now? Or is it some sort of wishful thinking in the Middle East? Because, to be honest, I don't see any sort of future for American bases in Saudi Arabia. Let's assume that they're not going to leave Saudi Arabia. What can they put in Saudi Arabia? Because any sort of attacks, it seems that we're going to have a long, long-term sort of conflict between Iran and the United States and Israel. Any sort of recognition of the war is going to destroy again and again the radars in these GCC countries.

#Guest

Yes. Well, you make a good point. I would say, in the first place, the Pakistani role is the old role of the Janissaries in the Ottoman Empire. In other words, they're mercenaries, outsiders, whose significant function is regime guarding. They're the presidential guard that can be trusted not to betray their paymasters. They don't have local power. They don't have local ethnic, they don't have local family, marital, or other ties. They can be relied on for money to do exactly what their role is.

The Pakistani role, potentially, as I understand it, would be internal security for guarding the sheikhs in power. They would not function for external, or even external offensive, or even external defensive operations.

You made the point, and we both, I think, agree. It's the U.S. role to defend. The radars have to be repaired and rebuilt. The bases have to be reconstructed. If Saudi Arabia and the other sheikhs cannot reach a medium-term, short-term, or long-term agreement with Iran, since I accept what you say, there's permanent long-term war. And so, as the most likely future, if that's the likely future, Iran must retain all the leverage it has. Therefore, it must retain control of Hormuz, and it must maintain the economic chokehold of each of the sheikhdoms. Therefore, non-aggression has to be partial control. And it won't be satisfactory to anyone. The role of Pakistan here is minor.

The Saudis buy Pakistani janissaries, mercenaries, presidential guards, internal security, in the event that various other forms of internal security become less reliable. At the same time, Pakistan has become increasingly dependent on the United States for its new post-Operation Sindor relationship after the war with India last year. It depends on the United States again. Pakistan is a very weak economy, run by a military which is continually preoccupied with repressing internal dissent and internal political division and opposition, in which a significant political leader is still in jail. So Pakistan is a beggar, and beggars can't be choosers here. Certainly not in grand strategic games.

It's achieved much more than it was given credit for as a mediator. Beggars' tables can be good mediation tables like rich men's tables, and perhaps beggars' tables can be more convincing. And in that sense, Islamabad has turned out to be more convincing than almost anywhere else one could think of. But it can only be as convincing a mediation platform as if the sides don't go back to war—if the U.S. doesn't go back to war, one. Two, if the sides can, in fact, negotiate stable terms. And do you think the United States, from what Trump is beginning to say, is close to negotiating on the terms that Speaker Ghalibaf has put on the table, that Iran has repeated time and time again in various forms? Do you think it's more credible? Do you think we're closer to, from an Iranian point of view, closer to a deal now?

#Nima

No, nothing close to a deal. There is no deal, John. There is no deal between Iran and the United States. That's not going to happen, in my opinion. But I think this visit, this summit between China and Russia today and tomorrow, that's going to have some sort of repercussions in the United States. And as an outcome of that, Donald Trump would sign this new aid to Taiwan—more than \$11 billion of weapons to Taiwan. I would see something like that because he's going to be disappointed with the meeting, with the summit between Xi and Putin. We know, you've just mentioned, I think that's going to be a big problem for the United States. That's why he said that he didn't sign it yet, but he's going to sign it soon, in my opinion.

#Guest

Well, there are two parts to that. I'm not in a position to say how the forces are in Washington over the second tranche of U.S. military aid to Taiwan. I don't think those lobby groups, the lines they're running, are going to be influenced by anything that Xi and Putin have to say. We began correctly that Taiwan was not mentioned on either side, except that the Chinese made it very clear it was the number one priority. And if you add to Taiwan the remilitarization of Japan, that's another very significant Chinese priority. And since there's no sign that the U.S. addressed those, we have to assume a certain amount of inertia. The Trump administration will go on doing what it was proposing to do, and the Chinese side will go on objecting. I hope I've made clear that in my view, that Russian priority, the urgency now, is economic. It's the Power of Siberia pipeline.

It's the assurances that China and Russia are not so at odds on the commercial level, on the economic level, on the economic interbank payment level, on dealing with the sanctions war. Both sides are sanctioned. Both sides have to figure out ways of avoiding sanctions. And those are the Russian priorities. Russia is at war on all fronts, including the seas, including the financial centers of the world, including the Ukraine battlefield, and it's facing the capacity of the other side to escalate with drone swarms against Russia's cities. That means that all of the effort that the general staff have been putting into destroying the drone factories has not succeeded. And Russia is in an election campaign. And so there are overwhelming priorities, I hope I can say, domestic priorities for the Russian side, for Putin and Xi to discuss. Taiwan, both sides agree.

I don't see that what they will say, even in this multipolarity agreement they'll sign, will make any difference to the way the Trump administration calculates. I think we have to accept that the Trump administration thinks that it has got President Putin more or less under its thumb. And the reason it thinks that is that President Putin keeps sending Kirill Dmitriev, who is, if anybody, convincing the Americans that they've got the Russians under their thumb. That's what Kirill Dmitriev demonstrates here — the need to reach agreements with Russia as soon as possible.

And I've got plenty of Russian sources telling me that there is a strong need in Moscow around Putin in this election period to reach an agreement with Trump soon, so that Putin can be seen to be acceptable again in the United States at the G20 summit, perhaps. These are all symbols of a need that's pressing on Putin's part. We don't have time now to discuss what the Russian dynamics are for that. Our focus is how the Xi-Putin meeting can contribute to those priorities on Putin's side. Your question was how will that meeting play in Washington, and I agree with you, it will make next to no difference on the Taiwan issue. I think we also agree that it will make more difference with respect to the Iran war. But what I think we need to be looking for is what's usually not said. What will these figures say?

What will Putin say? Because he will have a much more informative post-summit press conference, he will have a much more detailed readout than the Chinese side. So the questions that will be asked, because Russian reporters ask the president better questions than U.S. reporters dare to ask their president, the question will be: what have you said to deter the Americans from attacking Iran

again? What will be the answer to that question? Are, sorry, plural, President Xi and President Putin prepared to say that they agree the U.S. should not attack? Do they agree that the issue of Hormuz is much more than freedom of navigation? It goes to the long-term future, peaceful context, and abandonment of permanent war. Will they use that kind of language, or will they duck it?

#Nima

Thank you so much, John. And please go follow John on his web blog. It's *Dances with Bears*. Right below his name, you see johnhelmer.net. You can go there and follow John, and he's writing each and every day about the issues. Basically, he's...

#Guest

Well, it's very kind of you to refer, but we do know all of you out there prefer to listen, and you regard podcasts as your form of journalism, and you've stopped reading. So here's a test for next week. We won't be giving you a quiz on this. Can you read anymore? That's the test. Podcasting is a new form of journalism. I'm very grateful to you, Nima, for advancing it as progressively as you have, and it's not a qualification. Does our audience read? Do you want to follow up on what my opinion is or the next person's opinion? I think we're here to do journalism. I think we're trying to form belief.

I think the method still depends on your ability, the audience's ability, to look at the evidence and come to your own judgment. We're not here—I don't think we're here, though different people have different views—to persuade you of one view. We're here to help you think what you think. So the website, and it's the only one that's lasted so long in Russia, has what it has. But I'm curious to know how much of the podcast audience sees what we're trying to say here as a substitute for reading and not, I'm old-fashioned enough to think, as the real thing.

#Nima

Yeah. Here is one of our audience members asking a question, John. Look at this: if Russia fails to secure its interests in the Xi summit—power of Siberia 2, investment, tech transfer, etc.—will Russia pivot west and make concessions to the United States?

#Guest

The answer is already yes. We've mentioned that Kirill Dmitriev, the president's representative, is actively pursuing energy and airplane and every other form of investment to bring U.S. investment into Russia. He's totally failed on every project mentioned, but the pivot's already there because President Putin balances between lobby groups, between the oligarchy in Russia, which wants

business back to normal, which was totally oriented to the United States and Europe for tax evasion, for conserving wealth, for protecting their economic position inside Russia by burying their wealth abroad, and so forth and so on.

So I think it's a good question, but I think the pivot's already happened. We have a multi-pivot system in which the Power of Siberia 2, if it fails, will encourage those in Moscow who say, well, you see, we told you the Chinese are unreliable. We have to, have to, have to make a deal with Trump. And we have to do it quickly before he loses his power to dictate to the Congress. Yes, it's a good question. But yes, the pivoting is like a permanent ballet, and it's been on for several years now. And this is only act two.

#Nima

Yeah, yeah. Again, go to johnhelmer.net to follow John on his website. Thank you. Thank you so much, John, for being with us today. Great pleasure as always. Thank you again. See you next week. See you next week.