

# Scott Ritter: Iran's Hormuz Gambit: Can the US-Israel Alliance Hold?

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## #Nima

We used to have OPEC and OPEC Plus to decide about the price of oil. Do you think we have a new alternative in the market, which is the Strait of Hormuz? Because the flow of tankers through the Strait of Hormuz can change the price of oil, in my opinion, no longer.

## #Scott

Yeah, but that's... I mean, from a practical standpoint, I mean, in terms of outcomes, sure. I mean, look, we used to have Aramco, you know, the American-Arab Oil Company, the Arab-American Oil Company. And they basically overproduced Saudi oil production infrastructure. I forget the numbers — 12.5 million at one point in time was maximum production, but they were only producing at 9 million. Why? Because it's very expensive to have all this infrastructure that you're not using. And the answer is because when the United States needs more oil on the market, the Saudis can increase. You don't have to wait. They've got it right there — just turn it on, out it comes, go. And then when we need to tighten it up a little bit, the Saudis do.

And we had that relationship that said, we will guarantee your security in exchange for you helping be our market control mechanism. In theory, Iran could do the same thing through the Strait of Hormuz — constrict, release, constrict. The difference is they're constricting shipments that aren't their own. In Saudi Arabia, with Iran, you're turning on Saudi oil pipes, which are connected to Saudi oil fields and all that. Here, it would be Iran constricting the global economy, and that could be effective in war, but in peace, that's a non-starter. Iran can never be seen as actively squeezing the energy production potential of Kuwait or Bahrain or Iraq or even Saudi Arabia by saying, we're only going to let a certain amount of ships through there.

So this is why we need a ceasefire effect. But what's important is that the Iranians can shut it down anytime they want to. It's also important to Iran to keep it open and allow for the free flow of energy. As long as you pay your little toll tax — you know, \$2 million a ship, I think is what they're charging, depending on the cargo — let that happen and you're good to go. But I don't think Iran is going to be controlling that, because that's not Iran. First of all, Iran's never said that they're going

to become the arbiter of who makes money and who doesn't make money. Iran believes that all nations that produce energy are sovereign nations, and that's their sovereign decision.

And I believe Iran would support that as long as nations aren't positioning themselves. So I think part of the regional security framework has to include an energy security component that, you know, where, you know, if you have non-aggression pacts, it means Iran doesn't fear overnight the Strait of Hormuz being shut down, which means Iran then must commit to the free flow of energy. You know, and there have to be some very well-defined exceptions to that so that everybody understands that if this happens, this happens, this happens, then Iran has the right to do this. But so long as expectations are met, Iran has to let the traffic go through.

## **#Nima**

I think that's why I would say Israel is losing Saudi Arabia and Qatar, because the situation, the calculation on the part of these governments in these countries has totally changed. And do you think there is any way for Israel to, you know, do something about it or to reverse what's going on with the case of Iran? Because Saudi Arabia and Qatar are, I would say, so much dependent on Iran right now. It doesn't matter if they're going to rebuild or they're going to build a new pipeline, but they're not going to get everything out of their hands by these pipelines. They're going to be dependent on the Strait for most. Not only when it comes to the Strait, we have the internet cables that many people are talking about in Iran right now.

## **#Scott**

I remember in the 1990s, I had a conversation with the Israelis about the growing threat of Hamas. When I was traveling to Israel from 1991 through 1998, every time I went to Israel, there was a terrorist attack — a Hamas terrorist attack that killed people — blowing up a bus on Dizengoff, blowing up a restaurant, blowing up this, blowing up that, blowing up everything. Some of it happened right next door to me. I could hear the explosions. One blew up a restaurant I had lunch at the day before, there before the Great Goliath. I mean, it was, you know, this was day-to-day reality there.

And I had a conversation with an Israeli because I was working with the Israeli intelligence services, security services. So when we'd have lunch, we'd talk about a variety of things. And one of the interesting things they said is that one guy said the best way to make peace with Hamas is to actually negotiate directly with them. Invite them to the table and make them part of the solution, not just the problem. It's very easy to be a terrorist when everybody expects you to do nothing more than just be a terrorist. Low bar. But if you have to become a problem solver, if you now have a vested interest in the solution, it's different.

You know, it's politically impossible for this to happen because of the domestic dynamics. But, you know, one by one, I could, if I were in charge of Israel, I could do things. For instance, Gaza needs

to be rebuilt totally. Totally. I would create a plan to rebuild Gaza for the benefit of the Palestinian people. But give me an example. Right down here, they're developing. I had a relative once. She's a very smart lady, made a lot of money. And I remember I visited her once, and on her table, she had a map of Bozeman, Montana. And I said... She lived in Beverly Hills in a million-dollar house. I said, what the hell, you got a map of Bozeman, Montana?

She said, well, I'm buying land. I said, oh, well, how do you buy land? So she had mapped it out. She sat there and she predicted where all the critical crossroads would be. She said, this is where they build banks, this is where they build gas stations, this is where they build infrastructure. So I'm going to buy the land that they need to build the infrastructure. And then when they come to me, I don't sell them the land, I lease them the land. So I keep a continuous fee. I keep control over the situation. So if they ever piss me off, I can sell the land and their bank is gone. It has to go. And I went, well, that's sort of evil genius.

And it was. I would do the same thing with Gaza. I wouldn't say it out front, but I would rebuild Gaza. I'd buy every piece of property on the important cornerstones, and I would own Gaza that way. And I'd make sure the Gaza people prospered, but they also understood, at the end of the day, who controlled what. Or maybe if they don't understand—for instance, right now, it's the same thing, development taking place down here—I don't know who owns the crossroads, but I do know that, you know, that's going to become very essential for the local economic development of this area. So whoever owns it sort of has more control than an elected official in many ways, right? So I could solve the Gaza problem without any military force and actually rebuild it and make it look good.

But at the end of the day, I have direct control over what happens in Gaza. I could do the same thing in Lebanon. I could withdraw completely from Lebanon. The first thing I do, therefore, though, is rebuild Beirut. And I'm not going to let the Saudis come in. I'm going to use my cutouts, and I'm going to own Beirut. I'm going to buy, tear down the buildings, buy the important crossroads, build the infrastructure, and therefore politically empower certain people. Rather than seeking the isolation of Hezbollah, I would seek the co-option of Hezbollah. I would tell Hezbollah, I want to work with you. I want you to be part of the future of Lebanon. I want to redirect Hezbollah's activities from fighting me to building Lebanon. But they're building a Lebanon that I control because I control the crossroads.

And you see, I could do this game all day long. I could do the same thing with Iran. I'd be building economic reach into Iran. That's how Israel wins this war. But the Israelis can't think that way. They don't understand that because they have to dominate. They don't have the patience, the strategic patience. They've become such a warlike society and a racist society. But Israel, there's so much vulnerability in Iran right now. There's so much vulnerability because it's been subjected to sanctions for so long, aging infrastructure. A lot of damage has been done. The necessity of reconstruction has to be something that it will define. You saw how powerful Rafsanjani became after the end of the Iran-Iraq war. How did Rafsanjani become so?

Because he got involved in the reconstruction of Iran, and he empowered the Revolutionary Guard to get involved in that too. And the Revolutionary Guard went from being a bunch of 20-year-old fanatics who did their banzai charges at the Iraqis to being businessmen. The Revolutionary Guard today is a far more sophisticated entity because they were involved in the economic rehabilitation and reconstruction of Iran. There's a lot of political potential in reconstruction. And if I were the Israelis, I would stop bombing stuff and begin talking about how I can own the crossroads and think long term and make things happen. That's what I would do. That's the only way Israel is out of this. If Israel thinks they're going to get out of this by bombing, it'll be the end of Israel.

## **#Nima**

What do we know about the Iron Dome batteries? Who's producing these batteries? Because Hezbollah is hitting them right and left, not only in the southern part of Lebanon. In the last 24 hours, they hit three of them. Today, we've learned that two of them were hit in the northern part of Israel. And I don't know how sustainable that is for Israel with this sort of new attitude of Hezbollah, attacking using FPV drones to attack Iron Dome batteries. Well, it's not just Iron Dome batteries.

## **#Scott**

They're attacking the depth, the logistical depth of the Israeli presence. You know, Israel has never had to deal with Hezbollah having the kind of potential to dominate the operational depth of the battlefield. Hezbollah has always done a very good job at the point of contact. And Hezbollah has shown in the past the ability to send Katyusha rockets in to upset the political and economic balance of northern Israel. But the Israelis always sort of had a free hand to maneuver and to concentrate troops and to build logistics and all this, and then to flow resources into the battlefield and flow resources out. Now, at the tip of the spear, Israel's getting the snot handed to them. I mean, they're just – Hezbollah's just beating them raw, straight-up fight.

I'm not saying Hezbollah's not suffering casualties. Of course they are. This is war. But Israel has a lot of technological advantages. But the Israeli soldiers aren't that good. They're not that brave. They don't want to die. I'm not saying anybody wants to die. But if you go into combat believing that your life is valuable, you're going to die sooner. If you go into combat believing that you are an expendable resource and therefore you will be professional in the use of this resource to ensure that you get the maximum benefit out of it, but understanding that a war is designed to kill and there's a likely probability of you dying, you might live. Because now you're doing all the right things.

You're not hesitating at the moment because you think you're going to live, because you think your life's valuable. You do what the training tells you. And I think Hezbollah operates that way. I'm not saying the Hezbollah people don't get scared. I'm not saying there isn't fear. But I'm saying overall, Hezbollah is a much more professional, efficient fighting machine than the Israelis are because Hezbollah people understand and are prepared for the potential of death. And the Israelis don't want to die. They avoid death. Therefore, they make mistakes. They're hesitant. Hezbollah is exploiting

this on the battlefield and now throughout the depth of Israel. They're going 20, 30 kilometers in with these FPV drones, and it's just absolutely devastating for Israel. Israel doesn't have an answer to this problem.

**#Scott**

But is that going to force Netanyahu to change his policy, or do you see the same sort of attitude? And how long does the United States want to support Netanyahu? Israeli—and what are the capabilities of the United States right now producing these sorts of missile interceptors for Israel? And you didn't mention the Iron Dome batteries—whose batteries, you know? I mean, first of all, you have to be careful. You know, Israel expends a lot of Iron Dome missiles. I mean, so they—you froze, so I don't know if you can hear me or not, um...

**#Scott**

I'll keep talking just in case the audience can hear me and you can't. But Israel expends Iron Dome missiles at a prodigious level. So taking out one or two batteries here doesn't change the strategic balance. But it is a problem because every battery you take out, that's an area that's supposed to be defended. It's no longer being defended. And now other weapons and other resources can be brought in. Could you hear me the whole time, or was I just babbling into thin air?

**#Nima**

Yeah, I can hear you right now.

**#Scott**

Okay, because I've got three... I've got two of you on screen. I've got Nima... Oh, there, now I've only got one of you. Okay.

**#Nima**

I don't know if your audience heard me, and I don't want to repeat it.

**#Scott**

Look, the Iron Dome—no, it's a thing, just like anything else. But the Israelis produce a lot of Iron Dome, and we produce—I mean, we build it for them. We build the missiles, we build everything. Are you alive? Move so I know you're alive.

**#Nima**

Yeah, we're alive. Go ahead.

## **#Scott**

It looks like he froze. I was like, oh no, he did it again. But no, this is a problem. When you take out Iron Dome, I'm not so worried about the impact that has on production. What it represents, though, is that Hezbollah can now dictate operational realities into the depth the Iron Dome is supposed to protect. You don't just put Iron Dome haphazardly. One of the things the Israelis taught me—I mean, it was actually brilliant—you know, we were trying to look for installations of value in Iraq. Iraq's a big country. So what the Israelis did is they sat there and they plotted every air defense installation in Iraq, plotted it out.

And then you have, you know, you have the, the Rolands and other things that are only used to protect high-value things. So you look where the Rolands are. You assess it. You assess it based upon the threat dynamic that's coming in. You start drawing arrows where, you know, the air defense is laid out to defend against a threat coming here, here. And you get the intersection of the threat arrows, and you go, there's something valuable right here. And then you start looking around and going, ah, look at that. Look what's going on. Over time, they built a new road here. They brought in power here. There's something happening in this spot.

Okay, now we're on to something. So when Israel puts Iron Dome down or something, they're protecting something. Because the Israelis, when we projected onto Iraq doing this—what I thought was brilliant, you know, air defense pattern analysis—the Israelis are projecting on it because they understand that they deploy air defense in a similar fashion. This is a big hint to the Iranians right now: if you want to know where something of value is in Israel, plot out all the air defense and do what I just told you, because that's how the Israelis think—things of value. But that's—I'm going to get in trouble for saying that.

I'm not here giving advice to the Iranians. Anybody who's fighting a war, do air defense. You Ukrainians, you can do that against the Russians. And you Russians, you can do that against the Ukrainians. I'm an equal opportunity air defense pattern analysis guy. When Hezbollah blows these things up, they're blowing up something that's there to protect something. So now you've created vulnerability at something. I believe Hezbollah has done this kind of analysis. They know what that's trying to protect. And by destroying these, they're creating vulnerability windows that can be exploited so even higher-value targets can be struck.

## **#Nima**

Scott, how do you compare Donald Trump's visit to China to what we've seen with Vladimir Putin and his visit to China? And where are we headed with the war in Ukraine? Because it seems that something is escalating between Russia and the Europeans. I don't know how devastating that could

be. Do you think that Donald Trump was talking about it during his visit to China? Because it was all about Iran, as I remember. He didn't mention anything about Ukraine, but it seems that Ukraine is getting serious as time goes by.

## **#Scott**

Well, first of all, your audience has to take every word I'm about to say with a grain of salt, because I said that Xi Jinping would meet Vladimir Putin at the airport, and I was wrong. The foreign minister met him. Now, the foreign minister is a member of the Politburo, and the vice president who met Donald Trump isn't a member of the Politburo, so there was an upgrade. But my sinology skills are off a little bit, you know. So it is what it is. But look, these are two totally different meetings. The outcomes are totally different. China was seeking to manage the United States, and the United States was seeking to manage China. So there are two sides trying to manage each other.

One side managed better than the other—China. But these weren't meetings of friends. Vladimir Putin and Xi Jinping are friends. This is a meeting of friendly leaders and nations who are not just in a friendly relationship but a strategic relationship of extraordinary depth and longevity. This isn't a short-term alliance of convenience. This is a long-term strategic association of necessity, of survival. And that's what happened. This is game-changing, and it creates a solid foundation for what's next. You know, one of the important things about the Trump-China meeting is that Trump was put on notice about the existential value attached to Taiwan by the Chinese.

They actually said, "Conflict—that we will have a direct conflict with you if you interfere with this." That statement now is directly applied because the Chinese have likened Russia's interest in Ukraine to China's interest in Taiwan. So even though Xi Jinping doesn't come out and straight up say, "We support what Russia is doing in Ukraine," the indirect relationship is clear that they do. And now what they've done is they've created strategic depth, energy associations, economic relationships that will survive any potential escalation. I believe there will be an escalation. I think war between countries—Russia and at least one Baltic state—is inevitable as a war of warning.

I believe that—I think it's Latvia—will be taken off the map. Russia has already identified numerous military and leadership targets that will be taken out. They'll be taken out decisively. And I think Ukraine is going to be eliminated from the playing board as a politically viable entity. I think that Kiev will be annihilated by a massive Russian attack, destroying the decision-making centers of the Ukrainian government. If they relocate to Lvov, Lvov will be taken out. Russia's done playing games. It's over. They pushed Russia too far, and they got Russia into a zone that, if it continues, Russia suffers existential consequences.

Russia's not playing that game. And so Russia's now going to win, and win decisively. I think the United States is aware of this and that the United States isn't going to do anything in response to a reasonable Russian reaction. A reasonable Russian reaction would be the physical destruction of Kiev and a very meaningful, sharp, decisive attack on a Baltic state as an example. But the danger is, if

Europe doesn't take the lesson and seeks to continue, the next strike will be against decision-making centers outside of the Baltics, into Europe proper. And I believe that they will target Germany in particular.

## **#Nima**

It seems that Latvia is asking for nuclear bombs to be sent to their territory. I don't know what we expect from Donald Trump, but with the war in Iran, nobody would understand what would happen with the Trump administration. Are they going to do that, in your opinion, Scott? Say that one more time. You broke up. Can you hear me, Scott? Now I can hear you.

## **#Scott**

Can you ask the question one more time? This has to be the last question because I've got to go. But what's the question? Can you repeat the question? Scott, can you hear me? I can hear you. You have to repeat the question.

## **#Nima**

How do you see the situation with Latvia? The question is that Latvia is asking for nuclear bombs to be sent to their country. Is the United States going to do that?

## **#Scott**

No, not at all. That would be the kiss of death.

## **#Nima**

Nuclear bombs to Latvia. Is that going to happen?

## **#Scott**

No, the United States will not send nuclear weapons to Latvia. They will not do it. That's a bilateral agreement. The United States won't do that.