

Patrick Henningsen: PERSIAN GULF STATES TRAPPED: The End of US Protection?

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#Nima

We had a confrontation between Iran and Israel after Israel attacked Dahiya in the southern part of Lebanon. Iran attacked Israel. The Iranian attack was basically focused on the northern part of Israel. Then Israel attacked Iran. And from what I've learned about the Israeli attack on Iran, it wasn't a big deal. They didn't hit the targets, or those targets were not that significant in the eyes of the Iranians. And then the Iranian response to what Israel did was that they were hitting bases everywhere. From what the Israelis were telling us, they intercepted everything—no damage, nothing happened. Then the footage came out showing that Ramat David Air Base was hit.

Today, Israel accepted that after releasing those footages and saying that we are investigating the whole case of these missiles hitting the airbase. But they said no casualties, no damage so far, but the investigation is going on. Then suddenly yesterday, Donald Trump came out and said that there was an Apache helicopter in the Persian Gulf patrolling the Strait of Hormuz. It was shot, it was hit by something. Iran hit the helicopter. The two pilots are alive, they're safe, uninjured, nothing has happened to them, which was so amazing to hear. And he said he is going to respond. Later on, he said, no, that wasn't a big deal, we may not respond.

And then CBS News, in his interview with CBS, later after the comment that it wasn't a big deal, he said that we may respond to that. So our understanding was that he's going to respond. It's going to be a limited response on the part of the United States. They attacked last night. They attacked Sirik Island, Qeshm Island, and the port of Jask. They hit the targets. A telecommunications tower was hit in Sirik. Two water tanks were hit. Then we had the Iranian response to what the United States did, and the attack was on Bahrain, Kuwait, and Jordan. So Iranians said that they hit 21 targets, or they targeted 21 important locations in the case of the American air bases or the sensitive areas in Kuwait, Bahrain, and Jordan.

That's all, that's the whole case of what has happened so far. Today, Donald Trump said that he's going to—basically, what he's talking about, he says Iran's military is a complete and total mess. Much of it, like their Navy and Air Force, doesn't even exist anymore. They have been completely defeated. Iran is all talk and no action. The bully of the Middle East is dead. They have taken too

long to negotiate a deal that would have been great for them. Now they will have to pay the price. It means that my understanding is that there is no point in negotiating with the United States anymore. So what is your understanding? What has happened? And what do you make of what Donald Trump is talking about?

#Patrick

The thing is, Nima, that's what he's saying today, or this morning, Washington time. It might be something completely different by the time he goes to bed tonight, and then something different altogether tomorrow morning. So I can't really put any currency in "they're going to have to pay the ultimate price." And you could see him in an interview later tomorrow or something saying, "Well, I think we can meet with the Supreme Leader. He seems like a nice guy, seems like a good, strong young man." He'll give all of this back and forth. Donald Trump's advocates say, "This is what we love about this president. He's so unpredictable. He's not like those other presidents, those other weak leaders like Biden, who is so predictable."

Trump is unpredictable, and that's what makes his enemies afraid of him, because they don't know what he's going to do next. Well, I got a newsflash for you: Donald Trump doesn't know what he's going to do next either. So that's the part that's not in Sun Tzu's **Art of War**, which is, if you don't know what you're doing, your enemy doesn't either. And that's the problem here. There is no strategy from the US right now. They've backed themselves so deeply into these positions. A lot of them are based on false assumptions, premises, propaganda, and just outright lies. And they spend a lot of time managing the information space, as you know. There's also the profiteering on the back of the oil and the stock markets that's been going continuously with this administration.

So, first of all, I'm going to have to say I'm not convinced. I see conflicting reports on whether Iran actually shot down this Black Hawk helicopter. The U.S. or CNN reported that it was a Shahed drone that hit. I know Shahed drones don't travel that fast, so how it hit a Black Hawk helicopter, I'm not sure. Some Iranian sources have said that they believe the helicopter crashed and wasn't necessarily hit. Now, that does happen a lot, and with the amount of air sorties and missions you're flying, the odds are that there are going to be malfunctions and something is going to crash. Not to mention, in terms of maintenance and staging and things like that, any Black Hawk helicopter in the Strait of Hormuz is out of area, quite frankly.

And they're already stretching. So there's questions around what this is. One thing I can say, if I believe that it crashed rather than was shot down, that means it's a false flag by definition. Because if it crashed and then they're using it to claim it was shot down and then using that as a pretext for escalation, that by definition is a false flag. The United States is using their own military assets and crashing or whatever. It should in no way be a proportional response by the U.S. They claim that the pilots were rescued. Now, were the pilots rescued or not? We don't know. Are they ever going to be named?

Probably not. Like the Isfahan failed raid to grab the nuclear dust, whereas Private Ryan—Private Ryan doesn't have a name still. He should be a hero. There should be a Hollywood blockbuster film about his daring rescue, you know, the daring rescue of this airman in Iran. So what can we believe from the U.S.? Nothing. Nothing. It doesn't make any sense at all. And even if it was true, the Strait of Hormuz is not an area to patrol. It's not international waters. That is Omani and Iranian territory. Full stop. The U.S. has no business and no right to be flying Black Hawk helicopters around enforcing a naval blockade there.

And they're already using U.S. aircraft to fire at empty tankers, ships they claim are sanctioned. This is just outright piracy and kind of international racketeering. That's the best way to describe what they're doing. So they're caught in this that they absolutely can't back out of. And there's only going to be more and more triggers for escalation. So you could just have this long-running, relatively low-intensity conflict to save face, to be involved, not to get things too escalated with Iran, but just enough to justify the U.S. and give time for the rearmament of Israel and the U.S., of what positions they do have left in the region. So that's one way of looking at it.

The other way is if there is a massive escalation, which, like, if you took Trump's word on the threat he issued just recently, that Iran's going to pay the price—well, how long can the U.S. sustain a major barrage at Iran? Two weeks max. Two weeks max. And what's the retaliation going to be from Iran? It's going to be massive. It's going to be massive. And if, for instance—I'll give you an example, Nima—reports suggest that Israeli F-35s received air-to-air refueling support over Saudi Arabian airspace. If that's true, and it looks to me like it is, then Saudi bases then become fair game. But guess what else becomes fair game? Saudi allowed Israel and the U.S. to use airspace to fly through Iraq and then to attack Iran.

That means Ben Gurion Airport. Ben Gurion Airport, which is used to house all of the U.S. air-to-air refueling tankers—60-plus aircraft of that type, I'm led to believe, based on the photographs and what people reported—then Ben Gurion Airport becomes at the top of the target bank list. Now, I just can't see how you could get out of this conundrum if you're the U.S. or Israel. Because Israelis who are desperate to flee during a time of war, if that airport is wiped out or rendered inoperable, it's already de facto. Hundreds of flights have been canceled because there's no room on the tarmac for any more passenger airlines, because they're full of U.S. military aircraft.

Imagine if Ben Gurion Airport comes under Iranian missile strikes—sustained Yemeni and Iranian missile strikes—and Hezbollah drone attacks. Then what? What are the people of Israel going to do? They're going to beg the world to send boats to Haifa, and they're going to evacuate them to Cyprus and Albania so they could stay on, maybe build some settlements on Kushner's Island, but that's not going to happen. So I just don't think—I can't see this as sustainable. None of this is sustainable. So yeah, it's hard. I know people want to hear an answer of, you know, what do you think Trump's going to do? But he just flip-flops constantly, so it's impossible to say what his position is at any given moment.

I'm just looking at the math on what each side has in position, what munitions and military assets it can expend. And Iran has the advantage in the balance of force in the region, by nature of their missile and drone fleets, and by nature of the fact that they effectively control the Strait of Hormuz. And the U.S. blockade is just a nuisance, and it's not impervious either as a blockade. Ships are getting through. It can continue to fire at commercial ships. Using the U.S. military to destroy unarmed ships—for the U.S., that's kind of embarrassing. But is that the best use of the world's most powerful military in the history of Earth, which the U.S. is constantly touting every five minutes?

And all you can do is blow up empty boats? Because that seems like the majority of the activity of the U.S. military. That's kind of a ridiculous embarrassment at the moment. And again, that's not sustainable either. So they can only run this blockade, this sort of sham of a blockade, for not much longer—actually, not much longer. And it's not really effective either. There are all sorts of workarounds that have already been charted around it, either via sea or overland or along the Iranian southern coast. So it's not really—it's something as a political showpiece for Trump back at home, but besides that, very little in terms of utility.

#Nima

My understanding, Patrick, is that the response of the United States attack was a response to what Iran did against Israel—the latest round of Iranian attacks on Israel—because Israel has shown no capabilities with their offensive attack on Iran. You know, the country doesn't have the capabilities when it comes to their defensive air defense system. So, for those people who are arguing that Israel, without the United States, is going to be able to do anything in West Asia, I think that's delusional. That's totally delusional. That's why they're not going to let the United States leave the region. That's the ultimate goal. There is no way for the United States to get out of the region. I don't see that happening with the Trump administration and these people, these ultra-Zionists in the United States. They're going to stay there—in Jordan, maybe in Israel, in Diego Garcia, in Greece—they're going to manage something there to stay there.

#Patrick

Well, they won't leave. They won't leave voluntarily, but they could leave by force. And that's definitely a distinct possibility. What form that takes and along what timeline, that's another question altogether. But if you look at, I mean, the fact that they're using Ben Gurion Airport, a civilian airport, as their main air staging ground in West Asia, that is just a level of desperation that's hard to comprehend, quite frankly. But that's kind of what they're left with. And the reason they're left with that is because Iran has done something that maybe a lot of people didn't expect, which is that they treated all the GCC countries as co-belligerents when this conflict, this round of shooting, began.

And by doing that, they basically rendered the U.S. geostrategic military footprint in the region pretty much useless. So they managed to put pressure on all of the U.S. allies for participating in this, and then the economic damage and deprivation that's come as a result to Qatar, the UAE,

Kuwait, Bahrain, and Saudi Arabia is significant. And it has worked, it has worked. It hasn't completely deterred the U.S., certainly not Israel, but it's severely hampered the United States to the point where they have very limited options when striking Iran—very limited options now. They played out all these hands.

Iran has been hammering covert facilities in Iraqi Kurdistan, in the KRG, hammering them. That's huge. That's huge because that's been the real ace card that the U.S. and Israel have held since the beginning of this fighting. And so that, and dismantling a lot of the U.S. intelligence and spy networks and collaborators and agent provocateurs within Iran. So definitely the tide has turned rapidly. Iran has the upper hand. There's no doubt about that geopolitically, militarily, and also economically. There's very little the U.S. can do in terms of sanctioning to hurt or damage Iran that hasn't already been done.

And all they're doing anyway is forcing more people out of the dollar, in Asia as a whole and globally as well. And also just really fast-tracking China's Belt and Road network and other sort of overland solutions. They can arm the Balochi terrorist separatist groups and get them to carry out terrorist attacks in the Pakistani port of Gwadar and do all of these things to disrupt and sabotage China's Belt and Road economic network, which is land, sea, and, you know, rail, road, land, and sea combined network—an economic network of trade and distribution and supplies and things like that.

You can keep doing that, but there's only so much you can— you can only go so far with this. The U.S. strategy, all they have left is sabotage, is disruption and sabotage. That's all they have left. They are absolutely accelerating it. And the more other countries get cut off from that network, i.e. U.S. allies or Arabs under normalization policies, it's going to restrict their economic opportunities as well. So it's not going to be good for them economically, much in the same way that Europe has kind of strangled itself off by sanctioning Russia, and it's kind of destroyed or suicided its own economy by doing that.

So these things are not going in the favor of the United States. What the U.S. has tried to do, which Iran has also broken—the U.S. has tried so hard, as Israel has, to compartmentalize this conflict in Gaza, into Lebanon, and with Iran, and saying that, oh, well, this is between the U.S. and Iran. No, it's not. It's the U.S., Israel, and Iran. And the U.S. is always trying to portray itself as a neutral country broker on this. They started the war, they're backing Israel, they're arming Israel, they're providing every sub-level of support to them militarily, and then pretending that they're, you know, playing referee in the middle. And nobody believes it anymore. But they have to do that because Israel relies on that compartmentalization. While the U.S. is fighting Iran, they're going and destroying and massacring people in South Lebanon and massacring Palestinians in Gaza.

And they need the world to see these as separate conflicts. This is a really important part of the Israeli deception, of how they deceive the world in their sort of disingenuous framing. And what Iran is saying is, no, the source of all conflict, hostility, all death, all destruction in the region is Israel. It's the Zionist entity. And we have proof, because as soon as Iran fired missiles the last few days at

Israel, what did Israel go do? The first thing they did was shut off aid to the people in Gaza. First thing they did. So Israel's saying, we're going to punish the Palestinians for what the Iranians have done. By daring to have the nerve to fire missiles at us, we're going to punish those Palestinians. And we're going to use the Palestinians as leverage against the Iranians.

That's exactly what Israel is doing. And then, so there's evidence there. So Iran doesn't have to make a case. Israel has demonstrated that it's using the people of Lebanon and the people of Gaza as leverage, as leverage against Iran. And so by extension, the U.S., by allowing the compartmentalization, is also allowing Israel to do that. So Iran's drawn the red line, said, you bomb Beirut, we're going to—there's no ceasefire—we're going to hit targets in Israel and hit them hard, and we're going to hit U.S. bases, and they did. So Iran's drawing the red lines now, and the U.S. and Israel have to react or not react, whatever the case may be. So now Iran is setting the pace. That's what changed this week. Iran is now leading the pace of action-reaction.

That's a big difference from where it was before. They achieve this by being patient during this lull in hostilities and then coming out with a very clear strategic doctrine and policy, and drawing red lines. And only, and I will argue this, Nima, in international relations, it's my belief through the literature, through my studies, and through what many other great scholars have intimated, which is that in the international system, the system bends in favor of normative powers over time. Rogue states, the system does not bend in favor of. Rogue states can create problems temporarily, but in the long run, they're going to be overtaken by other normative powers who are bandwagoning together, and stability will be achieved through those normative forces.

Iran is acting like a normative power more and more. Only a normative power can draw a moral red line. Weaker states can't do that. They can't enforce it either. Iran has drawn it and is enforcing it. That is, you could argue, that's what superpowers are able to do, but at the very least, a mid-tier regional power and a normative actor in the international system. So other normative actors—China, Russia, European countries—have to recognize this course of actions and reactions because they themselves abide by the same rules in the international system, or they have to.

The U.S. doesn't have to abide by international law, norms, or anything like that. It can take it or leave it as it suits it because it's established itself as a global hegemon. And Israel's allied and tethered to the U.S., so it also does not have to abide by any human rights conventions, any international law, any norms whatsoever. And they don't. But the irony of the international system is, while the top power doesn't need to play by the rules, the rest of the system must come together and have to, even if they don't believe in international law, don't believe the U.S. will ever abide by it, or their ally Israel, or Britain, for instance, when they're allied with the U.S., doing these very same activities. The rest of the world must.

Because if they don't, there'll be total chaos in the international system, and more countries will lose as a result of that should hostilities careen out of control. So Iran's now stepped into that position. And let me tell you, many people could not have predicted that three months ago. And it's

happening. It's incredible how it's happened, and it's been very subtle. But as long as they stick—and what I'll say, Nima, last thing on this—if Iran sticks to its principles and does not budge, and includes Lebanon in any ceasefire packages, and does not budge, does not give any ground whatsoever, the longer they maintain this position, the other normative powers in the international system will see that.

That's more bankable. It's more predictable. You can invest in that, right? They're eventually going to blame Israel as the source of the instability, and probably the United States as well, ultimately, which many already are. But it will become very clear. So then that opens the door for other countries to take action, either through sanctioning or diplomatic pressure. And all Iran has to do is maintain its position, its policy. Don't budge, maintain their red line, enforce the red line. And all of a sudden, the thing is, if Iran is immovable on these conditions, then other countries will have to conform to that.

And you look at what's happening already. Look at the fighting between Israel and the U.S. politically. There are some serious shouting matches and insults going back and forth in the U.S.—the Zionist camp against Trump, the U.S. against Israel, Israel against the U.S. That's all because of Iran. That's because Iran drew this red line. That is the cause of that infighting. So Iran's already created political friction between its two enemies who are supposed to be the best of allies. And that's as a result of what they have done. They could have not done it that way.

They could have kept it compartmentalized and said, we don't want to worry about Lebanon. It's going to complicate our situation here. Let's just focus on Iran and the U.S. or whatever, our security. Don't worry about Israel and don't speak about Palestine. That's what most countries would do. But a superpower or a regional power can do more than that. And Iran is doing just that. And look at the results. They can sit back and watch their enemies start sniping at each other, arguing with each other about what to do, what not to do. Look at Lebanon.

I mean, did you see the interview with Christiane Amanpour and Joseph Aoun, the Lebanese president, just a few days ago? Did you see how strident and how Aoun was just slagging off the Iranians and Hezbollah, wagging his finger and saying, you can't interfere in our affairs and whatnot? But guess what? What's he been saying in the last 24 hours? Oh, Israel cannot have total security, and warfare is not a solution. Before, he was saying we want good relations with Israel. Please, Israelis, please bomb us all you want. But, you know, we're not going to do anything against you. You know, we're going to be a good little neighbor.

But the problem is Hezbollah and those Iranians blaming everything Israel is doing on Hezbollah and Iran. He's now flipped. The reason he's flipped is because the pressure is accumulating on him as a puppet, as a proxy of Washington, of Riyadh, and Tel Aviv. He's feeling the pressure because of this. And that's because of what Iran has done, not necessarily because of Hezbollah's resistance and

steadfastness. That's been a constant. But because Iran stepped up as a regional power and drew the line and enforced it. That is, look, it's just amazing. I'm watching all the shifts in position after this week. To me, it's incredible.