

John Helmer: Ukraine Today, Middle East Tomorrow?

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#Nima

Your different take on what's going on with Vladimir Putin, I would say, because you told me that Putin is dealing with some sort of crisis of confidence. What is that, and what is your understanding of the current situation with the war in Ukraine, and why you put it that way? We know, on one side, Vladimir Putin believes that—or not believes—he has his own people, like Kirill Dmitriev. I don't know if there are any sort of negotiations happening between the two sides, but he's responsible for those negotiations, if there are some. And on the other hand, we have Lavrov. He has his own take on what's going on. But before going there, your understanding of what's going on with Vladimir Putin and his understanding of the war.

#John

Thanks for the question. First of all, it's not my interpretation. I'm trying to report accurately what my sources across the board from different areas of government and policymaking in Moscow think. Increasingly, they are saying what they think. And let's start just very initially with public opinion. The Starobelsk attack on the dormitory, which killed 21 young women and their teachers and wounded more than four, has triggered, on the Ukrainian calculation, the idea that public opinion in Russia would become less supportive of the president and would generate an increasing level of loss of confidence in Putin as we go into the election. The election will be held over several days in mid-September. By September 21, we will have a new lineup in Parliament.

And support for the opposition parties—the Communist Party, the Liberal Democratic Party, and other parties—is growing at the expense of the ruling party. Now, if we take public opinion, what happened was the reverse of the Ukrainian calculation. In fact, the most recent polls taken by the Levada Center during the period May 20 to 28 show increasing public support for escalating against the Ukrainian regime and attempting to finish the war quickly. That's what public opinion thinks. On the other hand, you have President Putin explaining that his retaliation following Starobelsk involved the Ereshnik. But what did President Putin say in his press conference? He minimized what public opinion wants him to do.

Why did he say that? That the Ereshnik was not targeting anything—not decision-making centers, not systemic and consistent escalation against Ukrainian decision-making, command and control, military direction. Instead, he said the Ereshnik was fired in order to be tested, with mathematical precision, on how the warheads impacted. In other words, he minimized what public opinion was seeking to achieve. That's the Ereshnik. Let's take some other examples. Public opinion—it's not me. I've reported for years what the Russian oligarchs have done to minimize Russia's control over its own resources. Public opinion is very clear: Russians hate the oligarchs. They support the Russian army. Public support that's stable for President Putin is correlated with the achievements of the Russian army on the battlefield.

But the oligarchs are seen as the enemy. Increasingly, over the last week, Russian public opinion sees Russia facing increasing escalation of war from the United States and from the NATO powers. Now, if the oligarchs are viewed that way, with that much misgiving and distrust in public opinion, I'm not breaking news. On the other hand, why then did President Putin send an oligarch, Roman Abramovich, to negotiate with the Zelensky regime, with Zelensky himself? Why did he do that? He explained it differently in a press conference a few days ago, at the end of last week, in St. Petersburg. He didn't name Abramovich. That was for the Ukrainians to name.

But President Putin said the businessman who went is trustworthy and honorable. Now, nobody in public opinion in Russia thinks that of Roman Abramovich. When Zelensky reported the details of the negotiation with Abramovich, it's clear Abramovich had a mandate from the president to negotiate a variety of terms, all of which Zelensky rejected, and that rejection turned Abramovich into a boomerang—into an attack on President Putin and on Russian negotiating strategy. The entire episode reminds, and should remind, and does remind Russian people, analysts, people like me as reporters. And if it surprises our audience, then our audience needs to understand how Russians see things differently.

Abramovich was given President Putin's principal role in the original Istanbul negotiations of March–April 2022. The Turks treated Abramovich in the negotiating room as having a higher rank than the official Russian delegation. Abramovich has been a failure in negotiating on behalf of the Russian state. It's clear that Abramovich has been negotiating for himself, to protect himself and his assets in the United States from sanctions. There is no public trust in Abramovich. So why was he sent? It cannot have been Abramovich's initiative. That doesn't happen in politics, in diplomacy. But Abramovich isn't the only oligarch being used by the president.

Kirill Dmitriev, you mentioned him, Nima. Those who doubt there's a crisis of confidence in President Putin have to ask themselves, how much confidence do you, the doubters, have in Dmitriev? Dmitriev says he's constantly negotiating with Witkoff and Jared Kushner on the telephone. All you have to do is go to Dmitriev's Twitter account. He puts out a new tweet almost every hour on some days. At the moment, he thinks that the British government is about to fall and there'll be a revolution in the UK. He thinks that the same thing is happening in Germany. His comprehension of Europe is completely misguided. But let's leave that aside.

His real role is to represent Russian oligarch interests on behalf of President Putin, negotiating with Trump, directly with Witkoff. Witkoff and Kushner then, after getting off the phone with Dmitriev, ring up Zelensky. All of this is in public. I'm not making it up. And there is the question, and this is the crisis of confidence question. On the one hand, what's been achieved if President Putin sends oligarch one to Kiev? Nothing. It's negative. It undermines President Putin's credibility. Two, what's achieved by Kirill Dmitriev negotiating with the Americans on Ukraine? I would say, Russian public opinion would say, the Security Council would say, and as you said, Foreign Minister Lavrov said, he's achieved nothing. So let's just finish this long-winded answer by referring to the so-called Anchorage formula.

And I invite our audience, especially those who doubt what I'm trying to report here, read the Dances with Bears reports of the last two articles up, and you'll see in detail what Putin, Lavrov, Dmitriev, Abramovich, and even Zelensky are saying. What did President Putin mean, he said the other day, by the Anchorage formula? He said at the St. Petersburg conference, to applause — the Kremlin report shows applause — for saying, we are grateful to Donald, President Putin refers to him by name, for his efforts since Anchorage. What was the Anchorage formula, as Putin has explained it? Answer: Putin believes that President Trump offered and proposed that the U.S. will guarantee Russian security in Europe for the future. That's a very big undertaking. President Putin believed it in August and calls it the Anchorage formula.

The White House has never used the term "Anchorage formula." Since then, what has been achieved? What evidence is there that Trump can be trusted to deliver a security guarantee for Russia in Europe? Answer: no significant Russian public, governmental, intelligence service, general staff, or military planner that I'm familiar with, in private or in public, believes that the U.S. has done anything—anything at all—to even seem credible in delivering a security guarantee for Russia in Europe. Instead, we've just seen Trump escalating in Armenia. Trump endorsed the election of Nikol Pashinyan, the Prime Minister of Armenia, who was elected with almost 50% of the vote on Sunday. Western anti-Russian press says Russia intervened in that election. They don't mention that Trump did.

Yes, Russia is supported by two Armenian parties in Sunday's election against Pashinyan's 50%. Kocharyan and Karapetyan have achieved roughly 33%. Karapetyan is, I believe, in the 20s, Kocharyan in the 10s, so approximately 33% for the so-called Russian parties. Samvel Karapetyan made a billion-dollar fortune in Moscow, has returned to Armenia, and is under house arrest at the moment. The election result was rigged, no doubt about it, by the Americans, and they won. For the Armenian people, President Putin has offered a bunch of, in lengthy detailed speeches in the last week, economic inducements. He has not mentioned the understanding that most Russians I know believe that the U.S. is attempting to stimulate Armenia as a new Ukraine platform for attacking Russia and dismantling the Russian Federation from the Caucasus.

And if that's not convincing about what Trump's real plan is for Russia on the southern front... You know very well, Nima, and all our audience knows what the U.S. is intending to do to Iran on the southern front of Russia. Looking at the Iran war from a Russian point of view, it's a case of Trump attempting to not only change the regime in Iran but to destroy Iran as an independent state. Okay? So if you believe, as the Russian oligarchs want to believe, as Kirill Dmitriev insists, and as President Putin said himself last week in St. Petersburg to international businessmen, that he, President Putin, and Russia believe that Trump offers a permanent guarantee for Russia's security in Europe in the future—what on earth does the record show? It shows the reverse.

So what Foreign Minister Lavrov said—and I'll just quote it so that the doubters who want to disbelieve me can take their case to Foreign Minister Lavrov, who, by the way, has an Armenian father and knows very well how things work in Armenia. Let's just quote Lavrov and then I'll shut up. Quote: "If we talk," says Lavrov, "on Monday about the negotiations quite recently, almost a year ago in August 2020 in Anchorage, President Vladimir Putin, showing a spirit of compromise, adopted an absolutely specific proposal of President Trump. That's how the negotiations ended. I very much hope that the experience of previous failures, when the West refused to fulfill its own supported agreements, will not be repeated in relation to the agreement in Alaska."

But here's the rub. So far, unfortunately, says Lavrov, our American partners have not shown any interest in this. But we are certainly concerned about the statement of Secretary of State Blinken, who recently at a congressional hearing said the United States cannot act as a mediator as they support Ukraine. Therefore, it's difficult for me to comment on the prospect of negotiations. And that particular line was repeated by Vasily Nebenzya, the Russian ambassador to the UN, in the last hours. That's the case. When the case is as public as Lavrov and Nebenzya have made it, there is no Anchorage formula. There's no trust in the Americans in the Trump administration to provide a security guarantee for Russia in Europe.

And if we look at the Armenian result as an example—U.S. escalation on a new front, not even counting the rearmament of Germany, the deployment of nuclear weapons in Finland, et cetera, not even mentioning those U.S. actions—then there's a crisis in confidence that President Putin does not seem to acknowledge. He does not understand, or does not wish to make public, that public opinion, military opinion, the Security Council, and the Foreign Ministry all do not believe in the Anchorage formula. All of them do not believe sending oligarchs with business interests in the United States to negotiate for Russia is a patriotic, national, or even a practical idea.

#Nima

John, do we know if there is some sort of difference within the Putin administration between the foreign minister of Russia and maybe those parts of the government who are trying to make some sort of negotiations with the United States? And is there any sort of difference within the administration that somehow, maybe, I don't know, if Lavrov is somehow supporting this mindset?

You've mentioned that the people in Russia are asking the administration to escalate the war and to put an end to the war on the battlefield instead of, you know, negotiating and these sorts of talks that are happening. Who's supporting that in the Putin administration?

#John

I'm sorry, I didn't quite understand.

#Nima

Who's supporting the mindset of winning the war on the battlefield instead of negotiating with the Biden administration or anybody on the part of the West?

#John

Well, in the first place, the latest public opinion poll shows...

#Nima

No, I'm talking about the people in the administration. I know that the public is supporting that.

#John

Right. So what you basically have, factionally, is around President Putin, you have, in particular, the finance minister, Anton Siluanov, who's responsible now for the New Year's budget. Russia operates on an annual budget-making cycle just like the United States does. So, speaking as a one-time officer of the United States Office of Management and Budget, I know how the cycle works. And the cycle must work this way, more or less, in every country. And so it does in the U.S., where we're approaching the fall review, when the United States must decide at the level of all the agencies and the budget office what monies to spend for next year.

This is a very tough moment, and it's accompanied both in Russia and in the United States by an election period, where voters are increasingly hostile to the policies of the incumbents. So, in budget terms, what Siluanov has just revealed is that the finance ministry has said for next year, for next year's budget, there must be a choice, a presidential choice, between increasing expenditures on defense, military, and security, or cutting the budget deficit by cutting military expenditures. Or, if we, the Russian side, want to increase our military expenditures, we must do it at the expense of social welfare, health, medical, education, subsidies to the business community in the form of subsidized loans and other benefits, subsidies to agriculture, and so forth.

In other words, the finance ministry is saying, choose now—choose to budget more military expenditure in order to finish the war and secure Russia against its attackers. If you want to do that, you must balance the budget. That's their principle: you must balance the budget, so you must cut

social welfare. To say this at the beginning of an election campaign would be suicidal for most politicians, but the finance ministry supports the line: cut the budget at the expense of the military. The same line is reflected, as mentioned many times before, by the governor of the Central Bank of Russia, Elvira Nabiullina. Her policy is not only to keep the budget deficit down, but to cut the budget deficit as if Russia runs like a corporation in which it must cut its costs and increase its profits.

Her line has been: must control inflation, must reduce inflation, must increase interest rates, which have, in fact, produced what we now know to be a recession. President Putin wants to deny that, but the Russian people understand, all business understands, Russia is in a current recession. This is a long-winded way of saying we have the central bank governor who is protected by President Putin and must now be either extended for a non-lawful, a change-of-law term of office when her term expires next year, or we have the finance minister, we have the budget process, and behind them we have a variety of oligarch factions, many of whom are not happy at all with the interest rate policy.

There's no doubt about that, and they're vocal about that. However, their representative, Alexander Shokhin, who has been their chief lobbyist, was recently accepted by President Putin as now a statutory spokesman for all business in the country. So what you have to see is a business faction—call it oligarch business, not small business—mobilizing against the war, only they don't express it that way. They mobilize on the two, let's call them national slogans: cut the budget deficit and cut inflation. Those are their slogans, okay? When you see those slogans, you see the faction saying, basically directed by the oligarchs, to end the war. That's where President Putin's support for the so-called Anchorage Formula comes from.

What I'm saying here is, when President Putin—and this has been his style of decision-making his entire term and his entire life—when he is confronted by such fundamentally opposed views, let's call it the anti-war, business-as-usual, pro-American faction that's coming from one area of business and is supported in government by the Central Bank and the Finance Ministry. When he hears that, he wants to adopt their line. When he hears the other faction—Lavrov is speaking in public; he's not the most powerful foreign policy or military decision-maker—but when he says these things in public, he's reflecting the consensus of the intelligence agencies, especially Admiral Kostyukov, the head of the GRU, the Military Intelligence Agency, the FSB, the military command, the General Staff, the Defense Ministry—those comprised with Medvedev, Dmitry Medvedev, ex-president, the spokesman of the Security Council—the opposed faction.

Okay, that's the factional lineup. And what Putin's style is, all his political life, is to try to compromise and balance, equilibrate between two entirely opposed factions. So he takes half measures—one half one side, one half another side. When you do that, you can very often achieve political success, but not when you're fighting a war as important as the Ukraine battlefield is against all of the powers of NATO and the United States. That means that the other side, the adversary side, they don't watch

podcasts. They don't need to listen to us. They won't listen to us. They disagree with us. They think President Putin is vacillating, indecisive, and weak. And they think that by escalating, they will sow chaos and confusion within Russian public opinion. That's not happening.

They think they can have performative drone attacks on St. Petersburg when the international business conference is there, to demonstrate they have the capacity to reach far into Russia. They think that they can continue the war forever if necessary. That's their interpretation. President Putin's indecisiveness is not indecisiveness. He's picking conflicting choices and trying to balance them during this election campaign. When you try to do that, as he's tried to do with Ukraine since 2014, you get to the special military operation. When he tries to do that with Armenia over the weekend, the Americans say, we have the capacity. The Europeans say, we have the financial capacity to take Armenia from the Russians. And they will. That's the crisis of confidence.