

John Helmer: Russia REACTED to the MoU – Iran Insists on Ending War on All Fronts

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#Nima

Hi, everybody. Today is Tuesday, June 16, 2026, and our dear friend, our brother John Helmer, is here with us. Welcome back, John.

#John

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

#Nima

John, everybody's talking about the MOU, the Memorandum of Understanding, and what's going on. I think it's going to be a... it's going to... we have to start with what's going on between Iran and the United States. But before getting there, maybe, which is one part that is important from your point of view, because you see what's going on in Russia, basically. You understand the internal policy, the foreign policy, and their perception of what's going on between Iran and the United States. What is their understanding of the MOU?

#John

Well, we have to say at the outset, for all of us, that the best way to understand both war and diplomatic agreements, and texts of MOUs when done at the presidential level, is to understand them in domestic political terms. That's as much true of the United States as it's true of Iran, as it's true of Israel, and as it's true of Russia. So what if I go through, on the one hand, the Russian side, because you've just asked me, and that's where I'm sitting. And then we go to the U.S., and then we put the two sets of politics together, because they're dramatically changing between Russia and the United States, between the Russian factions, and Vice President Vance. And that's what I've called the Vancouver formula in today's Dances with Vance.

But we'll come to the Vancouver formula, or Vance/Anchorage, a little later. Let's just go through how it is in Russia. On the one hand, repeating as we've often done, Russia's got factional politics

just like everywhere else. The two principal factions here are in fighting the war in Europe on the Ukraine battlefield and addressing the United States, and also supporting Iran. There are two factions: the military and diplomatic factions, represented by the majority of the Security Council, and spokesmen include former President Dmitry Medvedev and Foreign Minister Sergei Lavrov. I'll be talking about what Lavrov's been saying in a minute. Then there's the faction around President Putin and the Kremlin.

The first of those people is Kirill Dmitriev, his special representative for negotiating with Witkoff and Kushner and other members of the Trump family. And his role is particularly important, certainly in his opinion, in influencing Putin. Putin balances between contradictory advice and policies from different factions. What he wants and what he says have to be interpreted as a balancing act. Balancing contradictions, balancing opposition is what he does. In many respects, that's successful, and it supports stable public support. In many respects, it's deceptive, it's illusory. In many respects, it causes strategic mistakes. So the response to the—let's say the peace terms that are in the memorandum—starts with President Putin taking the Dmitriev line of appeasing Trump.

That was fully on display when President Putin telegraphed Trump with birthday wishes on Sunday and then followed up with a telephone call. The telephone call strikes many members of the other faction in Moscow as groveling and unnecessarily appeasing. What Yuri Ushakov, President Putin's spokesman, did when summarizing the 45-minute telephone call was to speak of—and by the way, President Putin speaks to Trump in fluent English, right? Putin speaks English to Trump. What Putin did, according to Ushakov, was compliment Trump on his physical vigor, his energy. That's to combat the obvious medical symptoms, which include Trump's hypersomnia, his inability to control his ability to stay awake.

He complimented him on his achievements in negotiating with Iran. It was a trust-in-Trump display, as Ushakov spelled it out. That also means, according to Putin and Ushakov, that Kushner and Witkoff will now be returning to Moscow very shortly. What President Putin has done is put the positive on the MOU as if it's all going to be implemented. That's important because it's not shared worldwide. There's no hint of skepticism toward Trump personally or toward the terms of the MOU. No skepticism, but lots of optimism that now that Trump has, quote, solved that war, he can come back to negotiating the Ukraine war terms.

Remember that that faction, the Dmitriyev faction, supports the notion that there's an Anchorage formula, an agreement between Trump and Putin spelled out in Anchorage, Alaska, in August of last year for the U.S. to guarantee Russia's security in Europe. Putin and Dmitriyev are committed to believing that's possible. And they say, repeatedly, every few hours, Dmitriyev tweets it, that the only obstacle to the Anchorage formula's security are the British and the Europeans, who are blocking the reaching of peace terms with Moscow. That's their line. On the other hand, there's the, as I said, military security service, intelligence services line, which says nothing Trump signs, nothing Trump says, nothing the U.S. claims to be doing can be trusted.

And so what we've seen officially now is Foreign Minister Lavrov's high level of skepticism combined with hope that the terms of the MOU can be implemented. But he is very conditional and very skeptical. I want to emphasize something that most people aren't noticing — not in the Russian press, not in the so-called pro-Russian podcast press. That's the role of the Russian Central Bank. Elvira Nabiullina, about whom we've spoken very often, is against this war. She is allied with Dmitriev and Finance Minister Siluanov in trying to persuade Putin to come to American terms, not Russian terms, to end the war quickly.

Today and tomorrow, Nabiullina will be meeting with Abdolnaser Hemmati. He's the chairman of Iran's central bank. This is very important. It's a very important indicator of whether the Russian side will collaborate with the Iranian side on all the forms of, let's call them, payments — both crypto and actual — in what currencies, in what forms of secrecy and security to protect Iran and Russia from trading with one another and paying each other, whatever the U.S. imposes as continuing sanctions.

So when we look at the MOU and we look at the vagueness, as you yourself know, Nima, as others on our program here report, the vagueness, the lack of commitment on the U.S. side, Trump's most recent statements denying that there'll be any relief of sanctions, any delivery of cash — all of these question marks will be on the table when Nabiullina meets Hemmati. There has so far been a press release from Iran that the meetings have started. There is no press release from the Central Bank of Russia. Nabiullina has been missing in action, allegedly on sick leave, more likely under political pressure to threaten President Putin that if he doesn't follow her advice, she'll resign in public.

This is a very significant political fight going on in the background. But when we see the result, we'll see to what extent Putin has been forced by the military and diplomatic factions to improve the relations between Iran and Russia on payment and trade. And Nabiullina blocks Russian-Indian relations — the rupee trade, the accumulation of reserves in rupees and rubles on each side. She's been blocking that for years. It's therefore highly important to watch that. Now, Nabiullina will be reappearing in a press conference later this week on the 19th, and we'll see if she takes any press questions or responds in any way. So I'm surfacing it as an indicator of factional fighting in Moscow to answer your question. So, summing it up.

There's deep skepticism that the U.S. can be trusted on the part of Russian military, intelligence, and diplomatic services. Some of that skepticism is being reflected in the military bloggers and in influential commentators like Alex Sapon, who say, for example, look at the MOU terms and consider that Iran, a medium-sized country — I'm quoting Sapon — without nuclear weapons, has managed to defeat Israel and the United States without nuclear weapons. What does that tell us, Russia — that is to say, about our ability, Russian ability, to deter the Americans and defeat them on the battlefield? That's the sort of skepticism and understanding on the Russian side. And it's totally unreported if one focuses only on the Russian state media.

#Nima

John, when it comes to direct negotiations, I don't know if Russia believes that they can get... You mentioned the case of Iran. What about the case of Russia with Donald Trump? You mentioned Kirill Dmitriev is interested in continuing the talks, but there are no talks as time goes by. Is there some sort of message behind the scenes, back and forth? Did we have any sort of meetings between the two sides? What is that?

#John

Dmitriev has been making it quite clear that behind the scenes he speaks by telephone to the person he calls Steve — that's Witkoff. Dmitriev continuously, sometimes in several tweets a day, claims that he's in negotiations. We also know that Yuri Ushakov, the president's foreign national security advisor — in fact, he's more of a spokesman, not a policymaker — his background's diplomatic. He was once Russia's ambassador to the United States. They talk by telephone, and there's no doubt you'd call that negotiations. On the other hand, the sort of formal negotiations which are in the public domain, glare in the public spotlight — terms are being discussed, term sheets, MOUs are being discussed, and what's on them and what's not on them, who will negotiate them, what will be the state — all of the things that Iran and the Americans have just gone through with the mediation of the Pakistanis, the Qataris, and so on.

All of that is going on, but not at the formal level. Now, as I said, for factional reasons, Putin invites Witkoff and Kushner to come back. Lavrov says, let's see if they can explain why nothing has materialized since the so-called Anchorage formula was agreed last August. But there's another point. Trump was asked a few hours ago, as some of our audience will know. He's in France for a G7 summit meeting and then for some bilateral meetings. He's had bilateral meetings with MBZ of the UAE. He's had a bilateral meeting with Al Thani of Qatar. He's having bilateral meetings with Narendra Modi of India, and so on. He was asked about, now that you can devote some attention to the remaining big war.

What about the sanctions? Are you going to lift the waiver on Russian oil sanctions? And he said, yes. Basically, I can actually quote you, but essentially what Trump has said is, now that we've got the MOU underway with Iran, and if oil moves freely out of the Hormuz, the shortage of oil in the global market will diminish. And when that's the case, we will end our waiver of the Russian sanctions. We will resume them. That's what he said. What does that indicate in Russia? That Dmitriev, who claims credit for that waiver, whose job it is to negotiate relief of U.S. sanctions against Russia, is continuing to fail.

#Nima

Yeah. John, coming to the MOU, which is the main topic in the last 24, 48 hours. Donald Trump tries to, you know, Israelis wanted to know what is in that MOU. It seems that it was rejected by the Trump administration. We know how, by the way, it was reported by the Israeli media. It said that

Israel wanted—it was confirmed two times—that Israel really officially asked the Trump administration, they wanted to have a copy of the MOU, but it wasn't provided by the Americans to the Israelis. So they don't know what's going on. But I think the case of the MOU is dependent all on the situation in Lebanon. And just before coming to this line, we had Iran's central military command announcing that Israel violated the ceasefire in Lebanon, in southern Lebanon, more than 84 times.

So it says that if they continue with this sort of, you know, attitude, Iran's gonna respond to that, so everything's gonna be—everything's gonna collapse. When it comes to the MOU, which part is important, which part is the most important part in your opinion? And the other issue is the issue of Lebanon. How do you see the issue of Lebanon? Is that going to collapse everything with the MOU, or do you see the whole MOU as some sort of, you know, fake, or maybe some sort of fake gesture on the part of the Trump administration? They're trying to do something, but they're not capable. They don't have the leverage to go against Israel and the Israeli lobby in the United States. How do you see the whole thing between the two, Iran and the United States?

#John

Let's put it back where I began. You have to understand that the MOU is addressed globally by the Americans to their domestic political constituencies, and the two primary drivers of U.S. domestic politics with an election coming up on November 3. If you read the MOU as leaked, and the MOU text, which will be released roughly on Friday, by the way, when J.D. Vance goes to Geneva to sign it, Trump has made it clear, though he could, he won't. It's Vance's agreement. And this is very important. If you understand the MOU in domestic American politics and in domestic Israeli and Iranian and Russian politics, here's the American picture.

First of all, Trump thinks, and he's not wrong, that there's a direct correlation between his negative and positive approval in the polls, and therefore public opinion going into the election for the Republican Party, between the oil price and the perception of peace and improvement. Trump's approval rating has improved by roughly two or three points over the last two weeks as two things have happened. The perception is that he's making peace and solving this war. The effect on Americans, especially anyone who goes to the petrol station, the gas station, and fills up, is that Trump is promising to lower the price of oil. Now, that's the first part, and the second part's the succession.

Depending on how the midterms go will determine the outcome of who wins the Republican nomination. Will it be Trump or Trump Jr.? A dynastic succession—Donald Trump Jr. is rising in the polls—or will it be J.D. Vance, the vice president? Now, if you see that Trump thinks, and the polls show, that the oil price coming down is key to driving the MOU, then that's why you see Trump advertising. Three tweets yesterday, within hours of each other, coupled today, repeated in his remarks in France. He's only concerned with two emphases: one, no nuclear weapon; two, oil price comes down, no toll. Hormuz Strait under my control, blah, blah, blah. Those are the messages he's firing at his domestic audience.

That's what he wants his MOU to say. On the other hand, what you've seen is that J.D. Vance has briefed in greater detail on television, on CBS, what the terms are and what the, as it were, as he puts it, mutual and reciprocal and balance of concessions will be in the agreement. We can go from one to the other. But what you see is J.D. Vance is running for president in a way that he claims credit for the MOU's effect. And if it fails, either in Lebanon or by Israeli action or by Jewish lobbying in Washington or by any other means, and that generates higher prices at the gas pump and loss of votes in Congress, J.D. Vance will run against the Trump line, against the Israeli line.

Now, if you see that's going on, and you see the MOU as Vance versus Donald Jr.'s succession, then everything else becomes somewhat clearer in predicting what the Americans will do with the Israelis. Pardon me. Vance was asked by CBS in his briefing on Sunday or Monday, what about the Israelis? And he was very careful. He said, the agreement is going to be good for everybody, including good for Israel. That means that he's not sure he's overcoming the Jewish advisors around Trump, the Israel lobby in Washington, or the behavior of the Israelis in Tel Aviv and in Lebanon. He isn't sure that he can win the presidential succession and achieve a positive result for the Republicans in November by going against Israel publicly. Then you look at what Trump has said, asked specifically, what about Lebanon? What about Netanyahu?

Trump's made it very clear. He thinks that Israel should have invaded Lebanon, should hold southern Lebanon, and should destroy Hezbollah. What he thinks also is that he fully supports Netanyahu, but that Netanyahu made a mistake. That's the mistake about which he swore on that Israeli propaganda platform called Axios. Don't overemphasize the swearing and the repudiation of Netanyahu on Axios. That's what he wanted, and the Israelis were happy to oblige him to make it look as if he's what he calls himself, Israel's greatest champion. Trump favors Israeli occupation of Lebanon up to the Litani. He favors the destruction of Hezbollah. He's just repeated it in France. Okay, so since he's repeating that, but Vance is running a different line.

You see the potential conflict between the two. Vance has the upper hand at the moment. Vance will sign the MOU. Vance is saying, I'm the peacemaker. Vote for me. I'm for peace and lower gas prices. Trump is saying, I'm for the Jewish vote. I'm the protector of Israel. And Trump comes up with the line in France: I think that Netanyahu overdid it in Beirut, but didn't overdo it in attacking Hezbollah. So let's let the Syrians deal with Hezbollah. What does that really mean? What it means is Trump is saying, let us continue the war against Hezbollah in Lebanon in clandestine fashion. Make it look as if the Syrians are killing Hezbollah leaders. Make it look as if the campaign is a Syrian one, not an Israeli one. It's entirely subterfuge.

It's entirely impossible for Iran to ignore. So then the question becomes your question: what will Iran do? Iran, as I understand it—correct me if I'm wrong—in the statements that Iranian Foreign Minister Arachi, the Speaker of Parliament, and others have made, the MOU, as agreed, calls for a ceasefire. On the question of withdrawal of Israeli troops from their occupation position, let's say up to the Litani and over the Litani River, in southern Lebanon, it's not clear to me. Is it clear to you

whether Iran will make, as a condition of implementation over the next 60 days, Israeli troop withdrawal south across the international border, or whether Iran, for the time being, will tolerate Israeli occupation but on a ceasefire basis? That's unclear to me.

#Nima

It seems that they're preparing their strategy. Their understanding is that Israel, after all, within the 60 days, has to withdraw from Lebanon. That's the understanding on the part of the Iranians. I don't know. We don't have an official sort of statement by the Iranian government. That's why, as you mentioned, we don't have it from the United States. We don't have it from the Iranians. Israel couldn't get it from the Trump administration. There are some sort of speculations on this 14-point plan. One of them was Saudi Arabia.

The media of Saudi Arabia published a list of those conditions that were mentioned. We had access reported on the 12 points of the MOU, but when it comes to Lebanon, I think there is something. Basically, in the version of Axios, it mentions Iran, the United States, and their allies will cease hostilities, including in Lebanon. Iran reiterates its commitment not to develop or acquire nuclear weapons. This is the first line of this 12-point plan, MOU. And I'm trying to find the second, if they used again in this version of Axios, if there is something else concerning Lebanon.

#John

But this is all that we know.

#Nima

I think we're totally blind about the MOU.

#John

Well, we're not exactly blind, but what we can't see is what's not being decided.

#Nima

The details are important. I think you can say the details are so important. That's why we can talk about the points. But the most important thing is the details.

#John

But the details are in the politics. As I've said, there's a completely different factional lineup in Moscow, and there's a completely different factional lineup in Washington. Vance is running for peacemaking and for the oil price to come down. So is Trump. They have to. They accept that they have to, to preserve Republican control of the Senate, which will narrow toward the Democratic

advantage, and to prevent a Democratic takeover of Congress. They think they have to. The question that you raise is, does a ceasefire mean withdrawal of Israeli troops from Lebanon? Trump doesn't think so. I'll just quote him. What he says here, and he said it a few hours ago in France, is that the Israelis should have been able to do the job faster. In other words, he's basically endorsing an Israeli war against Lebanon that he's just failed to achieve in Iran.

Okay. Okay. Now, will all the sides agree to let the Lebanon situation freeze while the Israelis dream up, with the so-called Syrian cover and with Trump's blessing, a new way of attacking Hezbollah without violating the ceasefire? I don't know how you kill people without violating the ceasefire. That's one point. Second is the bigger point. Does this mean that Vance can compel the Israelis to withdraw from Lebanon entirely? The answer is he doesn't know he's got the power. Reason? He doesn't have the power. In Congress, there's probably a majority of Republicans who'd support Vance for succession, who want to keep Israel expanding. That's the problem Vance has to run against the Democrats in 2028. It's the problem he has now. So Iran has to calculate that they have to play the two American factions against one another.

Let's call them the Jewish faction around Trump and the Catholic faction around Vance. And both factions are frightened of the oil price and what it does to the vote. So what do diplomats do when confronted with these contradictory problems? They postpone a decision, they surround the problem with words, and they allow secret operations to conflict with public commitments. Now, is the IRGC factionally strong enough? Is the factional lineup in Iran strong enough to say, we will put at risk all of the terms of MOU contracts needed by Iran in order to support Hezbollah's survival and support withdrawal of Israel from southern Lebanon? That's a factional decision. It seems to me the Iranian side hasn't come to it yet. That's why we see conflict of statements in each of these places. Is that right?

#Nima

Yeah, yeah. I think what we've learned, John, from the Iranian foreign minister yesterday, he said at least Lebanon was mentioned in the MOU three times. He said three times. But in these two versions, the Saudi version and the Axis version, you don't see that happening. I think that these two versions are not accurate. They don't have the content of the MOU. They're basically speculating on what's going on.

#John

Yes.

#Nima

And, John, the question would be right now with the GCC countries. It seems that we have another argument about three countries and the reconstruction fund that basically is about GCC countries

giving that to Iran. Moments ago, we had Reuters reporting that half of this money, half of this \$300 billion for the Iranian reconstruction program, has already been committed. Reuters reported that.

#John

Yes.

#Nima

I don't know what that means. Does it mean that they have already given that to the Iranians?

#John

Let's do this. On the one hand, the U.S., and Trump in particular, are trying to say they will provide no cash to Iran. Trump's a little vaguer, but on the question of lifting oil sanctions against Iran, lifting sanctions against Iranian trade to the rest of the world, he's vague on that. Therefore, it's likely that the MOU terms on lifting sanctions can be agreed to by the United States. What Trump insists on, in order to show that his agreement isn't Obama's agreement—he keeps repeating it. He said it half a dozen times, repetitively, with Macron yesterday and with Al-Thani and MBZ in his bilaterals with them. He keeps repeating that he's not going to have the Obama agreement.

So the \$300 billion fund is a formula that's been devised by Trump with the Emiratis and the Qataris and with everybody else, including the Iranian side, to hide the degree to which the reparations issue will be solved for Iran's benefit. If the reparations issue can be solved for Iran's benefit, then the toll regime isn't necessary at the Strait of Hormuz. They're connected. So when you see \$300 billion as a fund, see disguised camouflage, a smokescreen, for essentially Qatar, Emirates, and Saudi Arabia paying taxes into a fund that doesn't look as if it's reparations for Iran, but it is, and paying the Hormuz Strait toll, which is what it is instead of the toll. In other words, \$300 billion is that kind of fund. By the way, take a look at what that means.

Haven't we seen such an American contrivance before? Yes, we saw it. The BOP, the Board of Peace Fund for Gaza. Remember that? That was to be subscribed by essentially the Arabs, Russia, everybody else who wants peace in Gaza and an end to the Israeli genocide. That was to be subscribed and isn't going anywhere, right? It was also to be managed by Jared Kushner, his family and business friends, and Witkoff's sons and their friends. These funds are schemes of bribery to the Trump family and their associates also. That was true in the Gaza fund. It's true in the proposed fund that Dmitriev has cooked up with Witkoff and Kushner. Also 300, 320 billion, including the Russian Central Bank reserves that have been frozen for, quote, post-war investment in Russia and in Ukraine, managed by these people.

Ditto now. The \$300 billion, which the FT, Financial Times, reported in some detail before Reuters, is in fact a disguise. It's a disguise for reparations. It's a disguise for the Hormuz Strait toll. And it's a

disguise so that the Trump people get their money, get their bribes. That's very important to them. That's more important to them than peace or war. That's why they make war. And finally, it's a disguise to enable Trump to say, I achieved the peace Obama couldn't, and I'm delivering an unfreezing of sanctions with Iran without paying cash. No, it's going to be disguised in the fund. And it'll look like Arab cash if it's discovered, but it's tit for tat with American cash. That's what it is. That's what that fund is.

#Nima

John, the other strange sort of argument today by Donald Trump was that he said Israel should leave Hezbollah alone and let Al-Julani do the job. I don't know what he means by that.

#John

Well, I think I answered that already. Pardon me. That's a disguise for continuing the war in Lebanon against Hezbollah.

#Nima

No, is that going to be some sort of—because we know that militarily Syria is not capable of fighting Hezbollah. Of course not. He means something else. He means something social. He means Israeli.

#John

He means Israeli operations of the kind—decapitation operations. That's what he means. The Israelis have had plenty of practice doing it against Iran, right? Right. And when it comes to the Syrian version, whether Trump has failed to remember a briefing that he's been given, what he's basically saying is they should have annihilated Hezbollah and done the job fast. I just quoted that. And we all remember that. He favored that, but he didn't favor Netanyahu bombing Beirut at the moment at which the MOU was being finalized. And that produced the Axios propaganda. Axios is not to be taken as if it's a newspaper. It's an Israeli mouthpiece with an Israeli byline.

And it continues to be favored by Trump to show that he's doing what the Israelis want. The idea that Syria will take care of Hezbollah means Trump favors continuous murder in Lebanon, the destruction of Hezbollah. That's what it means. But he doesn't want it to interfere with his solution to the Iran war. So it's a way of saying, I want a secret war in southern Lebanon. I want a secret war on Hezbollah. I want continued killing all the way up to Beirut, but not by air. Syria doesn't have an air force left. Why? Because the Israelis, with U.S. permission, bombed them and destroyed them. So no more air attacks on Beirut. Plenty of assassination attacks. That's what it means.

#Nima

Hmm. I don't know, how is that going to be perceived by Iranians? Because when you talk about a ceasefire, you have to stop everything. It's not about... Correct.

#John

Well, hang on a minute. Ceasefire, you're right. But these assassination attacks will be termed inter-Arab terrorism. Is that a violation of the ceasefire? Each side will say something different. Trump has let a dirty cat out of a genocidal bag again. He called it, let al-Jolani. He's good at terrorism. We all know that. Okay, he's very good at that. The Turks taught him. The Qataris paid him. The CIA helps him, etc. And now the Israelis will deal with it under the disguise of an al-Jolani terrorism campaign. What we'll see is violence on the street. And therefore, the problem for the Iranian side is to say, this is what's happening. This is what's happening. How do we deal with it? And is it in violation of our broader program?

Well, they've got 60 days, 60 days of podcasts from the United States like yours, Nima, to spell out exactly what's happening and blow away the smoke screens here. If Iran were to say, we know what you're doing, this is what you're doing, this is a patent violation. Let's ask Vice President Vance, is this campaign to play the American faction, the Catholic faction, against the Jewish one? It's going to be politics for the next 60 days. It's not fair to ask the Iranian side to immediately address something that hasn't begun yet. The tests right now are: will Israel stop air attacks on Lebanon? Will the Israelis stop exchanges of fire south of the Litani River, around Beaufort Castle, and so forth?

There'll be reports of ceasefire violations. You just gave me one, gave us one. That'll happen incidentally, regularly, and so on and so on. There'll be some attempts to make the smokescreen look credible. Netanyahu will, for his own internal politics—and I am not going to speak about Israeli internal politics—they've got an election coming up as well. They will go into secret mode as well. And we will see over the next 60-day period how the situation in Lebanon develops. But Iran has its methods. So does Hezbollah. So does the other axis of resistance have their methods for dealing with Israeli clandestine operations on the Lebanese battlefield.

#Nima

John, how do you see it? You mentioned that today Donald Trump had two meetings, one with the head of Qatar, the Qatari emir, and the other with MBZ as well, MBZ of the UAE. How do you see the role of the GCC countries in what's going on with the MOU? Because we know at least Qatar was so active in negotiating, going to Tehran two times. They were in Tehran for hours—17 hours, 24 hours—talking with Iranian officials to do something. How do you see these countries in this whole mess that is happening?

#John

Well, they're desperate to sort it out. They're desperate to restore their economies, their airlines, their airports, their oil terminals, their gas production units. I need to remind you that before Abdel Nasser Hamadi came to Moscow, guess where he was? He was in Qatar. In other words, Iran and Qatar have to work out interpayment systems that will work between themselves. They have to work out the reparations issue. Remember, the reparations issue was in Marsha Khamenei's initial terms. Reparations have to be paid. As we've said, not to repeat too often, reparations and the Hormuz Strait toll are connected.

The reparations can be more valuable if Qatar, Saudi Arabia, and the UAE pay through a, quote, investment fund. By the way, Trump has said there'll be no U.S. investment. He's not keen to see that happening. That doesn't mean that Kushner won't get involved financially for bribery purposes. But to answer your question, Nima, the GCC role—Qatar, the Emirates, and Saudi Arabia in particular—is central to the solution of the reparations. Their mentality is, we will buy protection from Iran now. We've been buying all our lifetimes. Our fathers bought protection from the Americans. Our grandfathers bought protection from the British.

And had things gone differently, they'd all have bought protection from the Germans. That's the way they think. So now they think, we will buy protection from Iran. That's why Hamadi was in Qatar, to work out how funds can be released. Now, I've seen Israeli reports, I've seen Russian reports that Qatar has begun to release Iranian cash that's been frozen in Qatar. While the Americans look the other way, as the Qatari banks and institutions release funds the Americans were insisting should stay frozen. So what we can see is a process in which the Arabs work with U.S. approval to begin releasing sanctioned or frozen Iranian funds as part of the down payment, as part of the MOU to start with.

So it's to say the important point, yes, you're right, Nima, the GCC plays a crucial role. But more important, Iran is the boss in that situation. It's, you pay us now for protection. We won't hit you any longer. We'll let your gas begin to be produced. We will let your oil begin to be shipped. We will let the vessels come in and unload so that you can have fresh water, pop, soda pop from the United States, and all the other consumables that you desperately need. And tourists will come back to your airports. Iran has the upper hand there. The Arabs are now paying the Persians for protection. That's a revolution in power in the Middle East.

#Nima

Yeah. John, before wrapping up, today Donald Trump said two things about Ukraine. One of them was that there is a tremendous number of people being killed on the part of the Russians and on the part of the Ukrainians, so there has to be some sort of end to the war. And the other point that he mentioned was that we are far away from Ukraine and it doesn't impact us that much, so we are not influenced by that war. The only influence on the United States is that they're asking for more weapons, so we're selling to the Europeans, to the Ukrainians.

This is the whole point. I think, considering what Donald Trump is talking about, we know that his priority right now is not Ukraine. That's why most of the time he's basically talking about the Middle East, Israel. So what is the solution on the part of the Russians? We have seen that Russia is somehow escalating on the battlefield. Is that your perception, that Russia may be getting to the point where the only way forward is escalation, new escalations, or cycles of escalation that could put pressure on Kyiv?

#John

Again, Nima, we have to emphasize the factional difference inside Moscow. And those who want to follow the Russian state media line misrepresent the amount of difference of opinion that surrounds President Putin on this. There is and there is not a Russian escalation. We've talked about this since the Starobelsk murder by the Ukrainian side of girls and their teachers in a dormitory. The use of the Iskander was a demonstration. It didn't cause any significant damage. Putin explained that himself. There is an escalation in the following ways. Yes, what Foreign Minister Lavrov called systemic damage and a consistent campaign now means attacking Ukrainian drone and other military infrastructure.

And we've seen more and more of those attacks. And in that sense, there's an escalation, but there's also an escalation on the Ukrainian, American, and European side — the escalation against Russian refineries, an escalation which is having a significant effect. It's having an effect on fuel rationing in Crimea. It's having an effect on refinery output and distribution. It's having an effect on the freedom to move by air, by rail, and by road. These are having effects. So here's the argument. The argument in Moscow is that the Nabiullina and the Dmitriev line is that Russia must reach an agreement with Ukraine and with the Europeans and with the Americans, starting with the Americans, as quickly as possible on their terms.

The military and the intelligence services, and Lavrov, say that's impossible. The Europeans, they say, aim at permanent war against Russia. The problem is how to handle Trump. Trump says, I don't really care about that battlefield, but I do care about Europe. Look, Trump has achieved an extraordinary success with Germany. Germany is now entirely dependent on the United States for gas. It was only 50% dependent on Russia for gas when the German government approved the destruction of Nord Stream 2. Germany is now more dependent on the US than it was before the war on Russia.

So, with the Iran war, that destroyed the alternative for Germany to diversify its gas supplies and energy supplies from the Middle East. That was a double whammy against Germany. Germany, the real power, the shadow Hitler in Europe, is now more under U.S. control than it was before. The French and the British, likewise the Italians, the Greeks, the Danes, you name it — from Trump's

point of view and from a geopolitical point of view, Europe is now more dependent on the United States than it's been in years. First. Second, Trump is getting paid for that. It's a protection racket he's now making money at.

He's quite right. Biden gave it away. Now he's making a profit. And look at how they crawl to him — Starmer, Macron, and the rest. They're going to put on a display. Macron will crawl with Trump to his vanity, putting on a display at Versailles the way Starmer put on a display at Buckingham Palace. I don't need to exaggerate. Trump has succeeded with Europe. So, since he succeeded in making money and in geopolitical terms with Europe, he will reinforce the war — the permanent war against Russia — because Russia represents the only alternative power in Europe to that control, in terms of energy, in terms of military capacity.

What's Trump doing? He's increasing nuclear weaponization in Denmark, in Germany, in Finland, in Poland, and so on. He's increasing his NATO plans for Ukrainianization — to put it in an ugly way — of drone warfare. The Ukraine drone war is now being exported to Germany. The Ukraine drone war is being deployed in NATO bases in Greece and in Italy, all over Europe against Russia. This is the underlying permanent war. Admiral Igor Kostyukov, head of the GRU, head of military intelligence in Russia, is in no doubt about what this means. The only people who want to deny it are Kirill Dmitriev, Nabiullina, Siluanov, and their supporters inside the Kremlin on Putin's staff. So they insist that Trump will produce a guarantee for Russia's security in Europe.

No, that's not what they're capable of doing. It's not really what Trump intends to deliver, and it's certainly not what the succession to Trump will deliver, though Vance has a different line. So, in short, the idea that it's only the Europeans blocking Ukrainian peace terms agreement is false. The U. S. has a two-track policy. Permanent war with Russia is the base for U.S. control of Germany, France, Britain, and the others. So it will continue. It's expanding. Trump has to congratulate himself on having Finland become nuclear-armed, and he'll come back to Greenland soon, and so on and so on and so on. On the Ukraine battlefield itself, the Russian army moves slowly.

Today's bulletin from the Defense Ministry is: on this front, we've achieved tactical improvement, tactical advantage. Yes, every day they move, but they move very slowly. And the reason they move slowly is to conserve and lower Russian casualties. Russian casualties must not rise during the election period. We too, in Russia, have an election — parliamentary election, September 18 to 20. On September 21, there will be evidence of significant support for the opposition parties. They may not produce a real change in the majority of the State Duma against United Russia, the ruling party. So the slowness on the ground reflects two things: one, Russian domestic politics; two, it reflects Putin's calculation, where he tries to accommodate contradictory advice.

Can he finish the war in Kiev by escalation? Answer: he thinks not. Can it be done in theory? The General Staff says it can be done. Can it be done in practice? Not when the Ukrainian drone manufacturer is now diversified outside Ukraine, without Russian attacks on NATO states. Putin says that's absolutely ruled out, while retaining doubt about his intention. Well, the Europeans don't have

any doubt about his lack of intention to attack them. He's demonstrated he will not even attack unmanned drones sent by NATO on the Black Sea. He won't even shoot them down. Therefore, there's confidence on the Ukrainian side, the European side, and the American side that they can continue their war while appearing to talk peace.

#Nima

Yeah, quite complicated, in my opinion — the situation in Ukraine.

#John

Isn't that what podcasts like yours are for? To try to sort out the complications instead of cheering for a mistaken interpretation. We're not here to cheer for mistakes. We all have hope. We certainly have hope, as do Russians, that Iran has shown the way, as a relatively weak country facing the combination of America and Israel, to create such damage and threat to them that they will come to Iran's terms. In Russia, we have a serious division. We're with Putin, persuaded by his central bank chief, by his special man in charge of bribes, Kirill Dmitriev, and others, that he won't go with the Iranian lessons.

And this absolutely flabbergasts and disappoints the factional alignment that I've talked of. But the lessons are on the table. The complications are on the table. And the confusion is, politicians can't make up their minds, and they try to say things that are contradictory. We try to sort it out here without misleading our audience and without depriving everybody of some hope that the aggressors, the genocidalists, the race haters — race haters against Iran, race haters against Russians — will be defeated in the end. But the end is a long time off, I'm sorry to say.

#Nima

Thank you so much, John, for being with us today. A great pleasure, as always.

#John

Thank you for having me. See you next week.