

Lt. Col. Anthony Aguilar: IDF Orders Massive Khiam (Lebanon) Withdrawal

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#Nima

Hi everybody, today is Wednesday, June 17, 2026, and our dear friend, our brother, Anthony Aguilar, is here with us. Welcome, McDonough.

#Anthony

Thank you for having me. It's a great day to discuss some important things.

#Nima

Exactly. And one of the most important things is the release of the 14-point plan, or the 14-point MOU, Memorandum of Understanding between Iranians and Americans. Both sides have released the document just recently, one or two hours ago, one hour ago. And the first point, Tony, is related to what's going on between Hezbollah and Israel. And I don't know if you've seen the document, if you've seen the points. And here is what it says. It says that the United States and Iran and their allies in the current war declare immediate and permanent termination of military operations on all fronts, including in Lebanon, and undertake from now on not to initiate any war, any military operation against each other, and to refrain from the threat or use of force against each other, and ensure the territorial integrity and sovereignty of Lebanon. What does that mean for you, Tony? Because Israelis are so angry about the first point.

#Anthony

I think that Israel is, for lack of better terms, pissed about this agreement now that it's been revealed in its full text. No more can Donald Trump hide behind hemming and hawing or shadowy language of what's in it or what's not. It's plain to see for everyone. Also in that language, you know, Israel being upset is that, you know, the language of the United States of America and the Islamic Republic of Iran and their allies. So, Iran, Hezbollah. United States, Israel, if we're specifically

talking about Lebanon. Now, in considering all fronts, that will be a point of discussion going into this 60-day period of negotiation or discussion on what exactly that means. That's obviously on the front in terms of the war with Iran and the United States, clearly indicated in here by name, Lebanon.

But it could also be considered that that also includes Gaza, because each would have an ally, so to speak, in what's happening in Gaza. Because if you consider Gaza right now, Gaza is now not something that's just Israel's baby. The United States is now a part of that because of this ceasefire, this negotiation, UN Security Council 2830, and the Board of Peace. So that's a sandwich that both the United States and Israel are taking a bite out of. So it applies in Gaza as well. This is a very hard pill for Israel to swallow, that Iran has intentionally put on the negotiation table. And if you... where does this kind of end when you read through all these points? You're like, okay, okay, got it. But what's the last point?

The last... the 14th point of this 14-point plan is that this will eventually be resolved in a UN Security Council resolution. So, not a UN General Assembly resolution, not a UN resolution, but a UN Security Council resolution. That means the five permanent members: China, Russia, the United States, France, and the United Kingdom, of which Israel is not a member. Iran is not a member. So when this thing comes to the table to be a UN Security Council resolution and these 14 points are adopted, or 13 points adopted, into a UN Security Council resolution, now the parties involved are Russia and China, and the United Kingdom and France, depending on how they vote, right? So it's really, as you read through all of this, that little bow at the end that really puts the gravitas into this deal in terms of its seriousness.

And when you look at that, again, this is not the UN General Assembly that Israel typically just flicks away and ignores. This is the Security Council. Important that that language is in there — the UNSC, not the UNGA — very important. So yes, Israel is pissed. We've seen military movement, let's just say, in the last 24 to 30 hours. There was going to be a large-scale operation on the ground in Gaza as part of combined arms maneuver, wide area security, back operations in that small percentage of terrain that still exists that's not occupied by Israel right now. I believe they were going to make this attempt to make that final 20% grab — occupy, buffer zone — like Israel loves to do. And the United States directly got involved and said, no, don't do it.

And they didn't, at least for now. Now, as we're looking at Lebanon with operations, we see that the Israeli forces — there's a lot of movement. Movement to various battle positions on the front lines, which in this case is in southern Lebanon — doesn't necessarily mean that there's withdrawal. Reconsolidation operations could be movement to positions for larger, more synchronized maneuver or combat operations on the ground. It could be a withdrawal. It could be a phased withdrawal. And that's where Israel, I think, is really going to try to push the envelope with this war-on-all-fronts piece to where... we're going to withdraw, but we're not just going to withdraw like the intent of the document, to where we leave. We're going to withdraw in phases.

We're going to move back to this position, and then we're going to say that, well, you know, we've got to have our logistics in place. We've got to do this, we've got to do that. And then we're going to move back here, and each step along the way, provoking and enticing and poking Hezbollah to respond in the south. That is where the discipline of both sides, or I should say the patience and the discipline exercised by Iran and Hezbollah, will be critical in these next 24 hours, going to the big signing ceremony on Friday, and over the next 60 days, as real as the hard chewing of these negotiations are kind of being worked through. I don't think Israel can restrain itself. I don't think Israel will restrain itself, because Israel is always looking for an excuse to be the victim.

So, what I'm most concerned about is this, especially when it comes to point one of these 14 points, and we kind of already sandwiched together, right, point one and point 14. So, point one, I think that Israel has a real problem with that, and I don't think they're going to abide by it. I mean, Israel Katz, Ben-Gvir, Smotrich, and Netanyahu have all said that that is an affront to our sovereignty. The United States isn't going to tell us what we can or cannot do to protect our security. But the truth is that, you know, is it your security when you've broken into your neighbor's house and you're taking over your neighbor's living room and they want you out? Is that really a matter of your security?

So we're going to see Israel pushing the red line, pushing the envelope every step of the way, because Israel wants war. And they want the cover of war, a greater war. And, you know, Donald Trump said something the other day in his little talk at the G7 summit that I don't know if he caught what he necessarily said, but he said Lebanon has become the little war. The big war we've kind of figured out; Lebanon's now the little war. He's right. The little war is now the war, and it is the war that may be the trigger or the precipitant to going back into a larger war. So I'm glad Donald Trump acknowledges that. I don't know if that was just a lucky statement or if he actually understands, but yeah, he's right.

#Nima

Tony, from your point of view, when it comes—because there was a report yesterday, it was reported by Lebanese Al-Akhbar, which is important because they're close to Hezbollah and they know what's going on on the battlefield in the southern part of Lebanon. It says that a significant number of Israeli military vehicles have withdrawn from the town of Qiyam in southern Lebanon, heading toward the Sarda and Al-Amra area, down in the southern part of Al-Qiyam and going to the south. This movement could correspond to an operation to redeploy Israeli forces or signal the initial stages of a more extensive withdrawal from the sector, according to this outlet. What do you see when they do this, and considering the behavior of Israelis, are they bringing all their forces together to reassess their sort of strategy in the southern part of Lebanon, or does it mean something else?

#Anthony

So, geography matters. Qiyam is strategic. Israel and Hezbollah have been fighting over this terrain. In 2000, there was a big battle. Recently, there have been battles back and forth. Why that matters is because, much like the Golan Heights, in this geography, in this terrain, Qiyam is a hilltop strategic position that really gives you dominance over the valley all the way to the Litani River and then the approach coming in from the south. That matters when you're fighting on the ground. That matters when you're fighting against FPV wire-guided drones. That matters when you're trying to bring to bear artillery or close air support. So it's no coincidence that this is where Israel is withdrawing to.

Imagine, if you will, you're playing basketball and you're on defense. And as the offense is coming down, you meet them at the three-point line to kind of, you know, get into their play. But then you pull back into the paint, you know, into the paint to guard the basket. You're not retreating. You're pulling to a position where you can better influence them scoring or preventing them from scoring. That's what this is right now. It's called withdrawal under pressure, tactically or doctrinally, where you're maintaining pressure against your opponent. In this case, Israel continuing to apply combat pressure against Hezbollah, and Hezbollah continuing to apply combat pressure against Israel. The IDF, both very considerate and very conscious to not start another conflict, right?

So it's this tension and this pressure. And moving back to Qiyam is a way to hold this position, to give them tactical advantage to where this could go either way. When you hold the high ground, when you hold the position, the key terrain, you can give it up, you can hold it. This is not a coincidence that it's this location. And I would say anybody that is interested in this, go back and look at 2000, the battle in and around Qiyam, and the battles that have gone on just in this year, this month, leading up to and then moving north of that. So this location, it is not coincidence. And in this case, especially in southern Lebanon, on the ground in this type of asymmetric battle where you have a conventional force trying to defend and or defeat an asymmetric foe like Hezbollah, every bit of terrain matters.

#Nima

Yeah. Here is the news that just came out: at midnight Eastern time, East Coast of the United States, sanctions on Iranian oil, gas, and petrochemical products will be lifted. It was just announced, and this is huge.

#Anthony

Go like, if the IRGC have a poster in their command center with, you know, like the US, Israel, Iran, gold stars — this is a gold star for Iran. This is something that I don't even think Iran thought they would have got. They're like, oh, let's get this thing done.

#Nima

Yeah. The second point, Tony, is all about not interfering in internal affairs.

#Anthony

Big one.

#Nima

Exactly. It's so important, in my opinion, because if they do that, if really they're honest in the way they're trying to negotiate, that would be a huge step for the relationship between Iran and the United States in the long run. Because we know since the revolution happened in Iran, the United States did everything — everything. Sanctions, oppositions, these terrorists like Kurdish, Iraqi Kurdistan — they tried to do everything, each and every trick to topple the regime in Iran, the so-called regime in Iran. So this is a new era if they decide to go that far, not to interfere in internal affairs. So these two sovereign countries sitting and talking to each other respectfully — the dignity is so important, in my opinion, in this sort of relationship they're preparing themselves to have. And how do you see that happening, considering what Mossad and Israel want?

#Anthony

So I think it's very important to read point number two as it is. So I offer this: the United States of America and the Islamic Republic of Iran undertake to respect each other's sovereignty and territorial integrity and to refrain from interfering in each other's internal affairs. Somebody should take that statement, chisel it in stone, give it to Donald Trump, and make sure that he hands that off to every US president thereafter. We should stop interfering in sovereign nations' affairs of governance, of ruling, of a government or a regime, as we call it, which is just a name that we've given the government of Iran — to stop meddling in other affairs, to stop trying to dictate for other countries what's right and good for them.

Can you imagine if, in the United States, when we had rioting in our streets and American citizens being killed in cold blood in front of America on American TV by federal agents? What if Canada decided, "Whoa, America, I think you need some help. We're going to go ahead and come in." You'd have a war on your hands. So this point should be chiseled in stone and forever remembered by every president that fills that seat thereafter. Don't meddle in other countries' affairs. And I think this is... there's a lot packed in here, though. So now that is... what does that mean? Well, if you're Iran, that means don't tell us how to manage our nuclear program.

So what if we want to pursue nuclear energy? And so what if, God forbid, we want to pursue a nuclear weapon? You have them, America. Every other country has them. Why shouldn't we? Why should America be the country to say, oh, you're not responsible enough or you can't be trusted to have one of these weapons, one of these nukes? Really? Because I'll tell you what this war has demonstrated, from the initial attack to the war crimes committed to the intentional strike on the Manab school, is that the United States is questionable as to whether or not they can be trusted with nuclear weapons. So this means to me everything.

Don't interfere with our governing. Don't interfere with our internal policies. Don't interfere with our governing structure. Don't assassinate our leaders. So, you know, there's a lot packed into this one. And if you're looking at it from Iran's perspective, that means everything, right? Like none at all. If you're looking at it from the U.S. perspective, here's where there might be some gray area, to where, well, we won't meddle in your affairs except for this. It says interfering in each other's affairs, full stop. So, um, this is going to be one where, uh, can the U.S. refrain from doing so?

#Nima

Yeah.

#Anthony

Yeah.

#Nima

I think, Tony, when it comes to the Iranian nuclear program, there is no point in this 14-point plan that says it has a point number. Let me find it here. It's number nine. It talks about the Iranian nuclear program.

#Anthony

Yeah, it's eight. Number eight. Eight and nine both touch on the nuclear program. Yeah, exactly.

#Nima

Exactly. Exactly. What it says about the Iranian nuclear program, there is nothing about no enrichment in Iran. So that doesn't consider it's all about nuclear weapons. And so Iran has declared before that they have no ambition in achieving nuclear weapons and the Iranian nuclear program. And this number eight is totally dependent on number seven. Number seven says that the sanctions on Iran, not only by the United States, but by the IAEA and the UN Security Council, primary and secondary sanctions, are related to the way that they're advancing on the part of the Iranian nuclear program.

If they achieve some sort of agreement as time goes by, with those achievements, with those agreements concerning the nuclear program of Iran, they're going to release the sanctions, they're going to lift the sanctions on the Iranian economy. All the sanctions—they have mentioned all types of sanctions. So this is significant, in my opinion, and somehow on equal footing. You go two steps, I come two steps. And this is the way that I see these two together. And what do you make of it?

#Anthony

Well, what I'd like to point out, if anyone with an objective view—not objective, America can never lose or big bad Iran can't win—if anybody were to look at these 14 points from an objective sense, you could go down this list to every point, and every single one of them is a win for Iran. Look at point number nine: the Islamic Republic of Iran will maintain the current status quo of its nuclear program, and the United States of America will not impose any new sanctions and will not deploy additional forces in the region. Wow. Wow. So, if you're looking at that from the position of what I think of points eight and nine, juxtaposed to what we now know of points one and two—don't mess in our internal affairs, stop wars on all fronts.

Now, additionally to the "don't mess with affairs," let's take the nuclear piece as a separate issue. Don't mess with that. And this is where I think there needs to be a better understanding for folks on a nuclear weapon. Everything that goes into producing nuclear energy—the refinement of the uranium plant, the production of the materials to go into what you would need to have a nuclear core reactor, let's say, in a power plant. You know, what we saw in Chernobyl. For anybody that watches *The Simpsons*, when Homer leaves at the end of the day and he hits the thing and the little rod bounces out and sticks in his shirt—that's a depleted uranium rod.

So that... there's no difference between that and then taking it to a weapon, other than putting the fission and the fusion thing together. We have this thing that has a fusion reaction triggered by this thing that has a fission reaction. Bring those things together, you have a nuclear explosion or a nuclear bomb. The delivery of that bomb to make it weaponized can be on anything. You can stick it to a bottle rocket. I mean, you can drop it from a plane. You can shoot it from a rocket. You can put a warhead on a Tomahawk. You can put a warhead on an intercontinental ballistic missile.

So if there was ever a real fear that Iran was trying to pursue a nuclear weapon, well, this point eight and nine just gave them a clear path to do it—more so than the JCPOA, more so than anything we achieved in fighting war. So really, these points highlight the folly of this war, of this conflict, because when you go into a war with a nation-state—remember, this was not a “Hey, Iran, you have this terrorist organization within your nation's borders, we're going to go fight them, don't interfere or else,” i.e., Taliban, Afghanistan—this is not that. We went to war with a nation-state. War with a nation-state is: we, as a nation, demand this. You're not willing to negotiate or comply with it, we'll go to war.

And the intent of war, any nation going to war, is that what you want to achieve should be a better position than what you went in with. This is not the position for the United States. The United States, as it is right now, if this is the document that goes forward, signed, sealed, and delivered for the eventual treaty—because an MOU is not a treaty, an MOU is not an armistice, an MOU is not an end of war—but if this is the language that goes into the final treaty, well, then the United States lost, hands down. So with these two points, if you're Iran, what this war has taught Iran, and I think

has taught the world that's watching, is if you don't have a nuclear weapon, nations like the United States and Israel are going to bully you. So, what do you do? If I'm Iran in this case, I'm going all in on my civil energy program.

Because everything that goes into—let's say I have a cup and I only fill it to 90%—that's how much you need for the uranium. You need 100%, you'll need a certain percent. And as I'm getting close to that, everybody's like, whoa, whoa, whoa, that looks like that might be a weapon. I stop and I say, okay, this amount is only enriched to this percentage. Set it aside, put it in storage, use it for whatever. And I just start up with another batch. Well, once you have many batches of 90%, it doesn't take a lot at that point to bring together the components of what you need for a weapon. So this is one of those things where it's almost like the United States becomes the boy that cries wolf, or Netanyahu is the Bibi that cries wolf, quite literally.

Two weeks from a nuke, two weeks from a nuke, two weeks from a nuke. You're not going to solve that equation through war, because look what it did. You fought a war. You lost it. And now, if they did have the inclination for that, you just gave them the key. And if Iran didn't have the ambition for it before, if I were Iran, I would. If I'm sitting in the government of Iran, I'm like, hey, do we trust these white devils? Do we trust these Yanks? No, no. Why would we? So these two points to me are like, really, the whole premise of this was we went to war to prevent Iran from ever having a nuclear weapon. And what we're leaving with is all we have is their word. All we have is Iran's word. Well, that's what we had prior to this war. So nothing's changed. This war is a mess.

#Nima

It was a mess. And that's why Donald Trump tried to do everything to get out of that trap that he himself created for the United States. And, Tony, the other point that was mentioned concerning the Iranian nuclear program, it says that 60% enriched uranium is going to stay in Iran, and they're going to down-blend that in Iran, not outside of Iran. That's right. As they said, you remember, they said the enriched uranium is like the soil of Iran. It's part of Iran. It's not going to get out of Iran. So if that's right, whatever we do, it's going to be on Iranian soil, and they're just getting the way that they sell it.

#Anthony

Yeah, they're mining the uranium, they're mining the components for nuclear energy within their own country, on their sovereign land, their ground, their earth. That would be like Iran trying to tell a farmer in Nebraska what kind of corn they could plant. No. It is their sovereign territory. It is their sovereign land. They're not getting it from outside. So, yeah, I think that what this has really shown is that it's something that, looking at this 14-point plan, to me, from day one, it was either going to end in this or lead to total catastrophic war where America would lose, and it would be an even

harder loss. Imagine spending two decades fighting this war just to come to the same conclusion in the end. At least the silver lining for America is that we figured it out in 106 days instead of 106 months.

#Anthony

Instead of spending decades, we figured it out quicker. So looking at this in terms of the sovereignty of Iran, I think this establishes world order. And prior to this conflict, prior to this war with Iran, the world was already on a path toward the undoing of hegemony, the undoing of a superpower. That world, your grandfather's 20th century, this conflict has been an injection of energy into flipping the page into the true 21st century of global parity, of mutual powers, of global balance, not a superpower or a hegemony.

And I sincerely hope that the United States is taking this in, recognizing Iran's sovereignty. And now, this point number two: let's not mess with the internal sovereign affairs of other nations. This is a point where the United States can now enter that global parity world with China and Russia and Iran and Pakistan and other nations as a cooperative nation, rather than trying to hold on to this superpower hegemony that's only going to lead to a harder fall. I hope this is a lesson. I hope this is an opportunity.

#Nima

And Tony, many people in Iran are arguing that we have to do something about this, because the Iranian Supreme Leader was killed by the Israeli government and they want to avenge. But here is what was said in response: the head of the Iranian parliament said the true way to avenge the martyred Supreme Leader of Iran is the liberation of Quds, which means Jerusalem. He's talking about the liberation of Jerusalem. He says a hundred Netanyahu's are not worth the shoelace of the martyred Supreme Leader of Iran. They don't care about Benjamin Netanyahu. They don't want to kill Benjamin.

That doesn't mean anything for Iranians. It's all about Gaza. It's all about Palestine, the liberation of Palestine, the West Bank, and the Palestinian people. This is the main goal on the part of Iranians. I think with the case of Lebanon, this is the start for the acts of resistance to go, if they achieve it. We don't know if they're going to achieve it. But they're moving. They're showing us they're serious about Lebanon. They're serious about Gaza, Palestine, the West Bank. Let's see what would happen in Gaza and the West Bank. I think that is of particular importance for the acts of resistance. But it starts with Lebanon.

And I think if they liberate Lebanon, that's a huge, huge sort of sign that they can put Israel in its place. Because right now they want to expand in Syria, in Lebanon. The West Bank is all gone. And Gaza, 70% today. Israel, at the Defense Ministry of Israel, Smotrich was talking about, they were talking about 70% of Gaza being annexed to Israel. This is the new sort of move. They don't have

any control on MOU so far, at least from what we've seen. Let's see what would happen. I think that's going to be a huge change considering Palestinian territory and the Palestinian people, Gaza, West Bank altogether.

#Anthony

I agree entirely, and I also look at this in terms of, uh, from, you know, if you are an Iranian and you're looking at this in terms of, you know, imagine if you were a Catholic and you lived in Italy and the Pope was assassinated, and this comes to this end, and you're like, whoa, whoa, whoa, whoa, whoa, we got the upper hand here. We're not stopping, are we? What? Like, so to the foreign minister's point in that, you know, the real win is this. This is the real victory. But you can't discount emotion. You can't discount the human component of war. You can't discount revenge. Ask me how I know. Because after 9/11, when we went into Afghanistan and it was all about beating the Taliban, we continued that war, and we continued pushing and pushing and pushing and pushing and pushing, in part for revenge.

In part for, remember 9/11. We pushed all the way down to the southern Helmand Province into Sangin, south of the ring route. Why? Not because it was in our strategic interest, but because in Sangin is where we wanted to put part of the World Trade Center steel. Nine locations throughout Afghanistan where we went and buried steel from 9/11 as a way of revenge. And after we defeated the Northern Alliance, defeated the Taliban, and were into Kandahar and then into Kabul and the seat of government—nope, we're going to keep going. Why are we going down there? Why are we going to Marjah? Why are we going to Sangin and Helmand? Well, we're going to put these 9/11 World Trade Center steel beams.

#Nima

Hmm. Okay.

#Anthony

So you can't discount revenge. You can't discount the entity of humanness in this. So if you're looking at it from the lens of an Iranian, you're like, hey, we're winning this. If the United States is willing to offer everything and the kitchen sink, imagine if we kept going. Let's avenge the girls that were killed in the Manab school. Let's avenge the Ayatollah. You can't discount that feeling. You can't discount that reality. It doesn't still mean that prudence and rationality of that... Revenge is real, but this is the real victory of what we now have in this deal. That is why I think it's absolutely imperative that Iran hold this deal, hold the United States and its allies, just like the United States is going to hold Iran and its allies accountable.

Accountability. Accountability. None of these fake deals like the ceasefire in Gaza. None of these fake charades like the Board of Peace. None of these lies and propaganda of, oh, there's aid going into

Gaza. No, none of that. Iran has to hold firm on accountability because right now, this is the last chance for Palestine to have a champion in their survival. They have existed and they have resisted through that existence. Now Iran can be the champion in their survival. Iran cannot step one foot back on accountability when it comes to Gaza, Lebanon, the West Bank. Cannot.

#Nima

Tony, the other important point is the Strait of Hormuz, and the United States somehow accepted that Iran is going to manage the Strait of Hormuz. They defined a period of, you know, a time period of 60 days during which there would be no sort of toll or fee. But later on, Iran is going to manage that with Oman, and they're gonna use their own mechanism, or they're gonna define it within the first 30 days together between Iran and Oman. They're gonna define it in the first 30 days, and after 60 days, they're gonna implement their plan on the Strait of Hormuz. This is one part. On the other hand, it says even the mining of the Strait of Hormuz will be dependent on Iranians. If they decide to do that, it's going to be by Iranians, and nobody, no one else, is going to get there.

Because today we were talking about Donald Trump being asked by some of these European journalists if Europe is going to do that in the Persian, in the Strait of Hormuz. And Donald Trump said no. I don't need them, but if they want to do this, they can go and do it. But here it mentions no one can get there. It's not about the United States together with Europeans. They're not allowed to go there. It's going to be by Iranians. That's why I think they want to manage this strait, because they don't want these radars, the military equipment, getting back to American bases in these GCC countries. They have to pass through the Strait of Hormuz together, or they're going to bring it with airplanes or something like that. But at least in the Strait of Hormuz, they're going to have the total dominance, the total control of this strait. This is one of the important points, but I don't know what is your understanding of this point, number five.

#Anthony

Yeah, I think in the Strait of Hormuz, this initial position is a position of leverage and power. Remember, the hard work in this agreement is yet to come. This MOU, you know, it's really important to understand this is kind of where my background in education comes in, in terms of strategy and how wars end, right? Wars end, and this is a war. It clearly says it in this 14-point, the ending of this war between, right? It's a war, a war that Donald Trump started. Wars end through decisive military victory, mutual exhaustion, or diplomatic negotiation. First, you have a cessation of hostilities — stop punching each other. Those typically end with a ceasefire and a truce or an armistice. This is an armistice.

This isn't a truce. This isn't a treaty. It's a ceasefire. It's a ceasefire that's more formal than the, hey, shake hands, let's stop shooting at each other for a while. This is a very formal ceasefire. Then you have the path to resolution. That's where we're entering now. On Friday, when this thing goes official, we cut the ribbon, we shake hands. Look at this — Donald Trump ended his 10th war, Nobel

Peace Prize, all that junk. Now the hard work in the path to resolution begins. In the path to resolution, you're dealing with belligerents — Iran, the United States in this case — with either total victory or negotiated peace. There was not a total victory on either side. No one... Did Iran have the upper hand?

Sure. But I think that no one would argue that either side had a total victory over the other. So we're dealing with a path to resolution based on a negotiated peace. That's this MOU. Then what do formal agreements lead to? Interim agreements. I would say that this MOU is kind of like the bridge between negotiation and an interim agreement to reach a treaty or a long-term treaty or path to stabilization and reconstruction in certain cases, potentially in this case. So when you look at all that, each side still has to understand where they hold leverage. So right now, until the United States releases those frozen assets, until the United States releases sanctions — they're not released yet.

That's still a point of leverage. So Iran can't go in weak with, oh, you're going to give me all this. Well, then I'll just wait. Give it to me. Well, the United States still holds the leverage. This is right out of Donald Trump's **Art of the Deal**. Hold your leverage. Hold your cards up until the point where the others have shown theirs. And then sometimes, if you read **Art of the Deal**, that's why I don't trust this plan, because Donald Trump always reneges. That's why I don't trust this deal with Donald Trump at the helm. So when you look at this, what's Iran's point of leverage to hold Israel and the United States to their part of the bargain? It's the Strait of Hormuz.

Do I think that Iran intends to impose absolute, total, full control on the Strait of Hormuz? I don't. I think in the coming negotiations down the road, it's very much in Iran's benefit, in their interest, to make this a cooperative — Oman, the Gulf states — to make this a cooperative administrative process. Now, would Iran hold the majority of the say? Well, sure. They physically own the majority of the Strait of Hormuz. The Strait of Hormuz is Iran to an extent. So when you look at it from that point and you go down, you look at — let's look at all the, you know, sometimes people look at this and they're like, this is the only strategic waterway in the world.

We have clear examples — the Strait of Malacca between India, China, and Japan. Is that just free flow, everybody uses it? No, there are fees. There are fees to use it. There's an alliance of administrative control. Imagine if a huge tanker were to go through the Strait of Hormuz and all of its oil — millions of barrels — spilled and made this ecological disaster like Exxon Valdez in Alaska in the '80s. Who's responsible for that? Who's going to clean it up? Who's going to pay for it? Maybe we should have something like a FEMA, right? Why not? The Strait of Malacca has it. Bab al-Mandab has it.

Strait of Gibraltar has it. The Bosphorus Strait has it. The Taiwan Strait has it. The Danish Straits have it. Over there, we're—probably Trump and Kushner. We have the Turkish ones. Then there's the—between the Black Sea, you have the Bosphorus Strait, but then you have the Dardanelles, right? The Dardanelles through Turkey. Another very strategic one, which Turkey controls—the Panama Canal. It's totally in Panama. Panama controls it. And the U.S. used to control it. Suez

Canal, right? There are so many. We have so many examples of other strategic waterways that have administrative control by one country or more.

Why not the Strait of Hormuz? Because it's Iran. Well, back to point two—let's respect the sovereignty of each of our nations and not try to dictate to the other one what they should do simply by the fact that they're that country. Those days are over. So when you look at all these straits and how that—there are clear examples of how the Strait of Hormuz can and should be administratively controlled and function as a strategic waterway, as a commons for the world to use. Well, there should be an administrative aspect to it. Why not? So in this language, with Iran having maximum control, I do think that that's going to turn into a cooperative between the UAE, Oman, Iran, and maybe input from other Gulf, Persian Gulf nations. But it's going to primarily be the UAE, Oman, and Iran. I think we'll see that in the coming weeks.

#Nima

Tony, here is what Axios reported: that President Donald Trump and Iranian President Masoud Pezeshkian digitally signed an MOU, the first known bilateral U.S.-Iran agreement to be electronically signed by the leaders of both countries.

#Anthony

I'll tell you what. Between ripping up the JCPOA and giving Joe Biden endless crap for the auto pen? Wow. Donald Trump just signed a treaty that's worse than the JCPOA for the United States with an auto pen. You can't make this shit up. Can you imagine that? Can you imagine if the Treaty of Versailles was faxed—"Hey, France, we're going to fax you over the Treaty of Versailles. Can you walk it over to Germany?" The world we live in. Yeah. It's going to be digitally signed, and when they go to Switzerland, they're going to DoorDash it.

#Nima

Yeah.

#Anthony

The irony is thick, right? I mean, the irony of this is that the President of the United States is signing a deal that, had he just stuck to the JCPOA, the United States would have more leverage, and we wouldn't have spent nearly half a trillion dollars and lost lives and the blood and treasure of America in war. And yet he's coming to the table with a worse deal, and he's auto-penning it. It writes itself. I mean, next thing you know, he's going to try to repaint the Reflecting Pond. Oh, wait, he did.

#Nima

Yeah, you made the point, Tony. Thank you. Thank you so much, Tony, for being with us tonight. Great pleasure as always.

#Anthony

Thank you. And we'll see how these things develop. And I pray for cool and prudent heads on the way forward. And I do hope that this is a turning point for the United States in realizing that, in the dawn of the new age, the real start of the 21st century, we should not endeavor to control the interests of other sovereign states. And I hope this was a lesson.

#Nima

Yeah, exactly. I hope so. I hope so. And we're going to talk to each other. Yeah, we'll talk to each other soon. Thank you, appreciate it.

#Anthony

Take care.