

Matthew Hoh: Netanyahu: Israel Will Strike Iran Again If Necessary

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#Nima

Hi, everybody. Today's Wednesday, July 1st, 2026, and our dear friend, our brother, Matthew Hoh, is here with us. Welcome back, Matt.

#Matthew

Hey, Nima, how are you doing?

#Nima

I'm doing great. And let me start with Matt. We were talking about the weather before coming on live. That's why I'm basically talking about the weather. But Matt, when it comes to the situation going on right now between Iran and the United States, we had an MOU between the two sides. Then we had the counter MOU, which is a new MOU between Israel and Lebanon, which basically comes to neutralize or violate the first clause of the MOU between Iran and the United States. I don't know how much of this MOU, what the necessity of that was, is Donald Trump. Part of it, in my opinion, is the help that Donald Trump is giving to Benjamin Netanyahu. He's, right now, running for office. He's basically, you know how serious the election is getting in Israel. They're fighting. They're fighting a lot. And Netanyahu came out and said, I'll do everything to win this.

#Matthew

Including maybe going back to war with Iran, right? Yeah. Yeah, maybe even going back to war with Iran.

#Nima

Exactly. He said the third round of war, if necessary, we're going to do that. But when it comes to the calculation on the part of the Trump administration, what is your understanding of that? If you want to get rid of this continuous problem in that region, you don't go that much in favor of Israel.

Or you're there to help Israel and no one else, and you don't care about Saudi Arabia, Qatar. These countries don't matter anymore to you.

#Matthew

This is really intriguing stuff—what's going on within the White House, what's going on with this administration. It's like the type of stuff you pick up in a novel in an airport bookshop or something like that, in the sense that you have this MOU, this agreement with the Iranians, that is a clear indication of the president's foreign policy. And it is done in broad daylight, essentially—the president announcing it, attempts at signing a ceremony at this beautiful resort in Switzerland, the president making statement after statement on Truth Social about it, military action beforehand, and intrigue and drama and whatnot. And then you have, on the Lebanese side, with this Israeli-Lebanon MOU, these five rounds of talks in Washington, D.C. that were paid attention to but were not given a lot of prominence.

And what came out every time just seemed like an indication that this is a failure and Hezbollah is not going to listen to it. So what does it matter anyway? And now, of course, you have this MOU with Iran that, as you were saying, the first article clearly states what's to happen with Lebanon. And then you have, at the end of last week, this agreement issue between Israel and Lebanon that directly contradicts the Iran MOU. And to me, Nima, what's so concerning about this is it seems as if it's Marco Rubio, the American Secretary of State slash now Security Advisor, who is running his own foreign policy that is contradicting the policy of the president.

Now, who knows how mentally competent Donald Trump is and how much he's aware of all this. Maybe he's fostering it. Maybe he likes to see competing plans or competing deals. But certainly this idea that the Americans have gone along with two MOUs that contradict each other on the—maybe the most crucial aspect of all of this, right—is Israel's occupation of Lebanon, at least in terms of being something that would restart the war. That is the primary disagreement, what have you.

And so to me, Nima, this idea that the Secretary of State slash National Security Advisor would do something like this, I mean, this is almost treasonous, particularly as you said, it more or less supports Israel, more or less emboldens Israel or gives Israel what they want here. So, going forward, I mean, I thought this was going to be the argument we were going to see in 2028 between J.D. Vance and Marco Rubio, but it's playing out right now in this administration in the form of two competing foreign policies with two competing MOUs. We're not talking about some annex that gets tacked on to the back of a trade agreement or something like that, and there's disagreement that way, and it contradicts what it says here.

No, we're talking about war, and we're talking about the war in Lebanon, the occupation and ethnic cleansing of southern Lebanon by Israel, and we're talking about the very real possibility of going back to war, then in Iran because of this. And that would not just be ruinous for the region, but ruinous for the entire world because of the danger of economic catastrophe coming from that. So

this is all really serious stuff, but the idea that the intrigue behind it—this Rubio doing his own foreign policy—this is really, really amazing.

#Nima

Matt, do you think that—because looking at the MOU between Israel and Lebanon, it's basically somehow like the MOU between Iran and the United States. It's not—let's put it this way—it's not part of the official commitment of the government. They're basically talking about, this is the roadmap for us to go ahead. And we had the head of the Lebanese parliament come out and say, we're not going to implement that, we're not going to do this. Because what is in that MOU is basically impossible, in my opinion. They want to remove Hezbollah by a political move, by an MOU. An MOU is so weak if you want to go against Hezbollah. You go fight Hezbollah; you cannot remove them, disarm them, with an MOU with a government that doesn't have that much support in Lebanon. And as time goes by, people are perceiving that—what is that? How is that going to help them? Right.

#Matthew

And we saw roughly the same thing last—not last November, two Novembers ago, November 2024—with the ceasefire deal that the Biden administration put into place, supposed to cover Lebanon. And in that, the Lebanese army was supposed to go into southern Lebanon. Hezbollah was supposed to leave southern Lebanon. The Israelis were supposed to leave southern Lebanon. There was supposed to have been a ceasefire. None of that happened. Right. So why should we think now that this MOU, this piece of paper—right—because the Trump administration is backing it, because Marco Rubio birthed it, that that's what we think should be successful? Because it doesn't address any of the fundamental issues here.

It doesn't address the shaky balance of power. It was called that to be polite. That is Lebanon, right? It doesn't address the reality of decades of Israeli aggression, belligerence, occupation, invasion, war crimes. It doesn't address any of this. So if you're not addressing that, then how the heck are you going to get to a point where Hezbollah is going to give up, that they're going to disband? I mean, potentially you could see that happening if you had a situation where there was a guarantee that Lebanon would never be invaded again, that there would be no foreign influence or foreign manipulation or domination within Lebanon.

Then perhaps you could see a point where Hezbollah says, you know what, we no longer need to carry these rifles, right? But where do we see that? How do we see that occurring? And if that's the goal of the American administration, of the Israeli regime, of the Lebanese government, whoever, then how do you get to that goal then? And you think you're going to get to it by what? Forcing the Lebanese army now to fight Hezbollah? And we also have indications that maybe the Americans are

going to be involved. The American military may have some type of role, an advisory role with the Lebanese army, which, you know, everyone should be thinking, hey, didn't JFK send advisors initially into Vietnam?

Right. I mean, like, everyone's hair on your arms and the back of your neck should go up when you hear something like that. And I mean, this idea then of—because you've had for a long time now, I mean, a long time—this wish from the Israelis, not just for the Americans to get involved militarily with Iran, but to get involved militarily against Hezbollah. So, you know, is that a pathway then? You send some American advisors in. Those advisors, of course, will be able to call in American aircraft. Eventually, some advisors will be killed or wounded, which will bring in more American military support. And before you know it, you've got a division of U.S. forces on the ground there. You know, we should also reference that the United Nations is no longer going to have a presence in Lebanon after this year.

I think this is the last year for UNIFIL. I mean, so there's going to be a vacuum there in that sense. So, OK, hey, well, the Americans can fill that spot, right? I mean, so you see the dangers in this, you know, and it runs all the way from the Lebanese villages that have been destroyed. And we saw Israel Katz, the Israeli defense minister, this week proudly boasting how effective the destruction of Lebanese villages by the Israeli army and their contractors has been. Katz said that in two sectors, in two Israeli army sectors in Lebanon, there was 100% destruction of the villages. And he said in a third sector, 73% destruction of the villages. Clear ethnic cleansing occurring here. The Israelis boasting about it, as well as the pledges by Israel.

Not just this government, the prime minister, the defense minister, that Israel's never leaving Lebanon, but every political candidate also—every political candidate of any significance, I should say—right, you know, stating the same, that Israel's not leaving Lebanon. And so this, now getting back to the Iran MOU, this contradicts the president's goals. This contradicts the president's policies. This does not achieve the victory, as Donald Trump would describe it, in the Persian Gulf. This does not do that for him. So we're, I mean, as confused as we were, Nima, about what was going to happen a week ago, or as confused as we were two weeks ago, a month ago. I mean, they just keep coming up with more stuff to make this all the more problematic to try and understand and anticipate what may come.

#Nima

I think when it comes to the situation in West Asia, basically the main concern on the part of the Trump administration is the global energy, the global economy. When it comes to Israel, they don't care at all about what's going on in Israel. They don't care about, you know, if oil is getting out of the Strait of Hormuz or not. They're basically not that dependent on that oil. That's why they're not caring that much about it.

#Matthew

And the other thing for Israel is... and we should state that's a deliberate Israeli policy. So when Israel went through an energy crisis—what was that, about 20 years or so ago—this was a deliberate policy of the Israelis to make themselves energy independent, to make themselves essentially a self-sustaining island. And much of their power now comes from their gas fields. Those might be Palestinian gas fields, but Israel has control of them. But we've also seen, too, that Israel does get a fair share of its power from coal-fired plants.

They still have a couple of those. And, you know, there was no effort by the international community, including nations like South Africa, which, you know, led the genocide case in the International Court of Justice against Israel, to preclude Israel's ability to purchase coal from them. So I think Israel just—you know, I apologize for interrupting—but just to make that point clear, the Israelis are not concerned about it, that the Strait of Hormuz closing again is an American problem. It's not an Israeli problem. And I think that's exactly how Tel Aviv views it.

#Nima

Yeah. But when it comes to the calculation in Washington, they have two sides: the Israeli lobby and the economy, forcing the administration. And who's going to win? Because let's assume we've learned from the Wall Street Journal that Donald Trump was briefed on an all-out war in Iran again. But he has decided to continue with the talks. Is it something delusional? Is it somehow a CIA operation? Because from what we've heard so far, the stockpile says something else. You know, the reality of the war, what has happened so far, looking at the reserves of the United States—oil reserves, petroleum reserves—and it's, you know, it's not there. The picture is not there for Donald Trump to start a new war. And on the other hand, you see Israel talking about the war, the Wall Street Journal reporting that Donald Trump is going to start a new war, maybe. What is your understanding of that, putting all these pictures together?

#Matthew

I don't know, man, like I'm thinking, you know, you're friends with Danny Davis, you know, on his show. When a subject like this comes up, they'll put up a card and sound the horn or an alarm, you know, to warn people that we're discussing Donald Trump. And so anything we say could be completely undone in the next minute by a Donald Trump Truth Social post. I mean, this is really difficult, this idea of trying to understand what Donald Trump is going to do and what motivates him. I think we keep coming back to the idea that he is motivated by self-interest. And also, too, we have to understand what is he like?

What does he want? He wants to have what he had last year for Gaza with the Board of Peace, where he had this big production in Sharm el-Sheikh, and all these leaders came, and they all stood—like 30 of them stood—behind him. And Donald Trump was just able to speak for hours. And then there were processions, and there was pageantry. Right. That's what Donald Trump wants. And I

think that's what Donald Trump wants out of this war. He wants the victory. He wants the ability to stand on a platform someplace in front of all the world leaders and say, I'm the one who ended the war. I'm the one who opened up the Straits of Hormuz.

I'm the one who did this, that, the other thing. All preposterous, of course. Right. All completely specious. All a fabrication, a lie, a great big farce. But I think that's what Donald Trump wants. And so how does he get that? Now, certainly this idea of his legacy being what he's looking for here, and that he'll make this war and this peace. And, you know, of course, context doesn't matter. History doesn't matter. It doesn't matter that it was his war that shut the Straits of Hormuz to begin with, et cetera, et cetera. It doesn't matter to Donald Trump. He just wants to be able to pronounce himself as the victor and as the peacemaker.

And this war and this peace then become his legacy. And he can't do that if the price of oil keeps shooting up. He can't do that if Americans are showing up and gas is \$4.50 a gallon here in the U.S. He can't do that if he doesn't get a chance to stand with all these world leaders behind him and laurels being thrown at him, right? I mean, so how does Donald Trump get that? Now, you know, certainly I think there is the very real possibility—and I know there's been a lot of this clip going around—and certainly things that we've been saying for the last month or so, that this war could restart after the election.

And certainly J.D. Vance gave us that glimpse this week when he essentially said, you know, right now the purpose with this MOU is to get the energy market stable, get our inventories filled back up with oil, and then figure out where to go from there. So certainly this idea that after the election, the Americans may say, you know what, let's try the war again. Now, what will they accomplish that they couldn't accomplish back in March and April? Absolutely nothing. But, you know, this may be where Donald Trump says, you know what, my legacy is better if I try again with the war. And this all depends on what he gets out of this deal, what it looks like.

Does he get the Iranians to down-blend their uranium and to allow the IAEA back in? And he can present this as the nuclear deal, basically a better deal than Obama had. I mean, his obsession with Obama is something that we should not at all diminish here. He is obsessed with the man. And, you know, so again, what is Trump's self-interest in all this? Now, the elections—of course, we could ask, well, whose elections? The American or the Israeli elections? And I'm not being cute or trying to infer that the Israelis control the American elections, although, you know, they certainly do. And there's a panic here in the U.S. because these left-wing democratic socialists keep winning.

And it's absolutely great to see the meltdowns here in the U.S., not just from the Republicans, but also from the Democrats as well. It's absolutely terrific. So just as an aside. But yeah, what about the Israeli elections, though? We talked about that for a little bit just before, right? They are due—I guess earliest would be in September, latest would be in October, so a few months from now. And for Benjamin Netanyahu and his governing coalition, does it make better political sense to start the war with Iran again and just attempt to drag the Americans back in, calculating that there's no way

the Americans will not support us? But with Donald Trump, you know, maybe it's the case, as we've talked before, there might be a small possibility or a slim chance.

But there certainly is a possibility and a chance, where with his predecessors that never existed before, of Donald Trump not supporting Israel. So, you know, I don't think anybody has a clear idea of how they want to proceed here or what's going to happen or what their adversaries are going to do. With the exception, I think, of Hezbollah, they will keep fighting. They will keep resisting. The Iranians, I think, will keep demonstrating that they are in control, that they control the Straits of Hormuz. They will close it as they need to. They will shoot at ships as they need to. They will get up and walk out of meetings as they need to. They will let Witkoff and Kushner cool their heels in Doha for a couple of days as they need to.

They will continue to show their confidence, demonstrate their control. But other than that, you know, I mean, I will also add, too, we're coming up, Nima, you know, on Friday will be the 1,000th day of the genocide in Gaza. And, you know, the only thing I can say with certainty as well is that the Palestinians will continue to suffer. So Hezbollah will resist, Iran will remain in control of the Straits of Hormuz, and the Palestinians will suffer. And as far as what the Israelis and the Americans will do, I don't know. I'll also add—maybe I'll add this, since we're going around the globe here—the Europeans will be no help whatsoever. I'll add that in as well.

#Nima

Europe is irrelevant. I don't see Europe being relevant anymore. Matt, when we think of West Asia, basically, I think the war has complicated the whole situation in West Asia. You remember one of the main issues with the Trump administration was the petrodollar—how to keep that in power, how to, you know, remain the oil export based on the dollar and all of that. It was some sort of concern. Saudi Arabia didn't, you know, extend that contract between Saudi Arabia and the United States about selling oil just in dollars. And they're selling to China in yuan, in Chinese currency, right now.

#Matthew

And that was the... You know, I mean, we've seen that Iran has pushed through like 50 million barrels of oil in the last week or so. More than 40. Do we know what they're being paid in? Because I've seen different things about how they're being paid. At one point they were saying they were being paid in crypto. Have you seen anything definitive on that in terms of how they're being paid? I haven't seen anything.

#Nima

Even the head of the Iranian parliament, who was mentioning that last night, didn't say how they're getting paid.

#Matthew

Yeah.

#Nima

Is that because they're basically selling to China? I don't know. I think it's going to be in yuan because they're selling to China. It's going to be in yuan. They're going to keep that yuan to do the exchange. That's my understanding.

#Matthew

Yeah.

#Nima

Because basically they're selling to China. I'm wondering, even to India, because I remember when Donald Trump—you remember when, in the initial days of the ceasefire, Donald Trump gave this sort of lift of the sanctions for Russia and Iran in the initial days of the war—basically, I think it was like March 6th. They didn't even make it a week exactly. They were selling oil to India, and India had to pay Iran in yuan, if I'm not mistaken, during those days. I don't know. They didn't mention. I have no updated information on that, let's put it this way. But the whole concept of the petrodollar, I think, is getting more complicated because the way that you hit the economies like Saudi Arabia and Qatar—these countries are so important for the petrodollar.

And this war has hit them. It's unbelievable the way their economy was somehow influenced by this war. And you have that in your calculation, and you have that as a serious problem for the economy of the United States, for the future of the United States. And you have the issue of Israel, both together. These two pictures don't come together because the reality of the Strait of Hormuz has changed, as you've mentioned. And they can do, because of the geography—basically, J.D. Vance said that—we learn something new: geography matters. So if it's something new for J.D. Vance, then they have to do something about it in the Strait of Hormuz. They have to do something to have some sort of stability in that region.

And by supporting Israel, I don't think that they're going to achieve it anytime soon. That's why you put pressure on your allies in West Asia—basically Saudi Arabia, Qatar, all GCC countries together. On the other hand, you want to help Israel. Israel doesn't see West Asia the way the United States sees it. Look at the way Israel sees itself right now. They're talking about two forces in West Asia. One of them is the Muslim Brotherhood, the other one is the Axis of Resistance—Shia. Shia and Sunni, two parts. One of them is supported by Turkey and Qatar, the other one is supported by Iran. And they're against both of them. Basically, they're fighting the whole region, to be honest.

#Matthew

In their mindset, in their worldview, that's the way it's supposed to be. And I think that's one of the things that keeps Israel in this spiral that will eventually cause major, major problems. And I'm not saying this because I have any insight. It's just that I read what the Israeli security people say, and they keep saying that their own people are the problem. And when you have this messianic, righteous world vision that you need to dominate everything—not just the land under your feet, but the land over the horizon—and you are this tiny country, you are going to run into problems. And I think that's going to be essentially internal, where they have a lot of those problems. But at some point, maybe they will take on a fight that is too big for them, and they won't get the support from the Americans that they need. But their obsession is clear.

There's a report today out of i24, maybe, or one of those Israeli press outlets, about how they're blaming J.D. Vance for letting Erdogan know about the Kurds being used to overthrow the Iranian government. And if people are familiar with this, the Israelis are bent out of shape. They've been bent about this for months now, about Turkey and Erdogan. If it weren't for him, this thing would have been over in the first week. But Erdogan wouldn't let the Kurds into Iran to overthrow the government in Tehran. This is all Erdogan's fault. And now, of course, with this positioning of this Vance versus Rubio conflict, right? I mean, you've got this idea that Vance is Iran, Rubio is Israel. And now you've got this report coming out of Israeli media today saying it was Vance who told Erdogan that the Kurds were going to be used for regime change in Iran.

And so this is all Vance's fault that this didn't go right. I mean... But that type of hysteria, that type of obsessive clinging to this worldview, yeah, this is going to be the undoing of Israel. I think most people are, you know, I don't think I'm saying anything. But getting back to this idea of the petrodollar, one of the things that's important about it is all those Gulf states, their currencies are pegged to the American dollar. So, you know, if the dollar loses its value, this could be really destructive for those economies. So looking at those states, how do they get out of that tie to the American currency if they choose to, if they want to, but also as well accepting the changing reality? One of the things I saw—it may have been Pepe Escobar who said this.

I can't remember, Nima, but this idea that this year at the BRICS conference in September, there will be a real proposal to implement BRICS Pay, or whatever they're calling it, as an alternative mechanism. In the past, we've seen the BRICS hold off from that, hold back from that, about developing an alternative currency that would seek to replace—maybe not replace, that's kind of a strong word—because the dollar's reserve status is ensured for another decade or so at least, right?

Just because of the size we're talking about here, the scale we're talking about here. But, you know, this idea that the BRICS countries would go forward with creating a real alternative to using the American financial system, to using the financial order, the monetary order, the economic order as

we understand it now—they would create an alternative. And from what I remember from that report, it was the Indians who are the ones really pushing it now. And the Indians are taking the lead on this. And the Indians certainly have been very involved in these things before.

But the idea came, as I understand it, this really comes out of the Americans sanctioning, or with the secondary sanctions on Russian oil, that the Americans produced at the end of last year, that are specifically aimed at India—aimed at other countries, but really aimed at India—because India was importing so much Russian oil. The idea was sanctioning Indian companies and banks and institutions, and the Indians understanding the danger in that. I mean, it was right in their face, of course—how could they not understand the danger? But also, too, their loss of sovereignty, right? That the Americans can just do this. Hey, look, we've got this deal, we're getting good, cheap oil from the Russians, and the Americans are going to stop it in order to be for their war in Ukraine. They're now going to hurt our economy.

And unless we do something, unless we fundamentally restructure things and create alternative mechanisms, we will always be at their mercy. So I think this question of the petrodollar—you know, it's been around. The first time I heard about it, I was in high school during the Gulf War. I'd never heard of such a thing. It was still, at that point, even up until, I would say, maybe even 10 years or so ago, a lot of serious people in Washington, D.C., and in the American corporate media would scoff at the idea of there being a petrodollar—that there was this deal hammered out between the Americans and the Saudis in 1974 or whatever it was, you know. And so, yeah, the implications here for, you know, the Middle East or West Asia in terms of where this is going to go.

I mean, you're seeing a shift, a remaking of the order that is just not going to be about the United States maybe no longer having their bases in Kuwait and Saudi Arabia. This is much, much greater than that. And certainly we've seen with the Pakistanis, their role with the Saudis, the way the Pakistanis, you know, it's an end to the relationship with Turkey, where Egypt is going to lie, how the Emiratis have decided, how it looks as if the Emiratis are going to move forward in all this. Yeah, I think a year from now, two years from now, three years from now, if I'm lucky enough to still be having these conversations with you, we'll be talking about things in an entirely different way.

#Nima

How do you see, Matt, the outcome of the war for the security concerns on the part of the GCC countries? Because basically, before the war started, it was all about the United States supporting or protecting these countries. Right now, with what has happened—with the bases, with the attacks—they basically can focus on Israel instead of, you know, helping these countries, because these countries were hit because of the American bases in their countries. And right now, how do you see the assessment on the part of these countries as a whole? I'm not talking particularly about Qatar or Saudi Arabia; I'm talking about as a whole, when you see these countries and how deeply they were investing in the United States to help them, to protect them, to bring some sort of security to their countries.

And right now, you see the equation is somehow changing. Behind the scenes, it seems something big is happening between Iran and Saudi Arabia and Qatar. They're not talking about it yet, but there is something going on. I'm pretty sure there is something going on and nobody's talking about it. They want to somehow improve the relationship between the two sides. On the other hand, we have the option from China. China could be part of that. Russia could be part of that. How do you see the whole thing? How is that changing? The calculation is changing in the minds of these GCC countries.

#Matthew

I think this has to be a great lesson for them. And so I would suggest that they be very cautious about future relationships with other great powers, with other external powers—Russia, China, whoever—that they need to focus on themselves, rely on themselves, understand that their self-interest is more than likely tied up much more with their neighbors than with any external actor. We can go back to what Mark Carney was saying back in Davos. He's a hypocrite, but at least his words at Davos, which I think were right on—he certainly didn't follow those words in the last several months. But Carney's idea that mid-sized countries need to band together—they need to recognize that their interests are not the same as the great powers' interests.

And that's the way it's always been in history. And I think these countries, whether they knew that the relationship with America was fraudulent, whether they understood just how superficial and hollow the American security guarantees were, whether they anticipated that their countries would be used as a buffer, not just militarily but also economically, in a war against Iran—if they didn't understand that before, then they do now. And now the question becomes, just how corrupt are those countries? These are all monarchies. We're talking about that part of the deal for the decades since the Second World War has been: you be loyal, good members of the American empire, and we will keep you in power.

And, you know, are they still going to hold on to that bargain? Are they that corrupt? And I know plenty of people from the region who say, absolutely, they are that corrupt. They will continue with this relationship because that is what is in the royal family's best interest. I mean, I know you don't want to talk about individual countries, but the one country I know you're not including in this mix is Jordan. We know exactly how Jordan is going to act in all this. We know exactly how Amman is going to proceed. They're going to just get even closer to the Americans and the Israelis than they were before. You know, I wish they'd prove me wrong, but they're not going to do that.

So I think what you have is a very real evaluation in the region and an understanding that their interests are bound with one another more than with any external actor, that they can only really depend upon themselves and maybe, by extension, their neighbors, and that if that's not what they're taking away from this, then they are even more corrupt than we suspected they were. You know, the idea, too, of the permanence of this conflict—you know, at the beginning of the, I think it

was at the signing of the MOU—you had the Saudis, Qataris, maybe the Pakistanis, I can't remember who it was, but there were four or five countries that put out a statement essentially saying, look, the only way this actually gets resolved is with the establishment of a Palestinian state, paraphrasing what they said.

But, you know, the permanence of this war, the permanence of this conflict, this instability, the possibility of recurrence—it is there until the Palestinian state dies. And until you have that, and until you have an Israel that no longer threatens its neighbors, that no longer lives with this vision of domination, that no longer has soldiers wearing patches on their uniforms that say “from the Nile to the Euphrates,” you will continually be in this place. And I think the Gulf Arab states understand that, or they should understand it.

And if that's the way it's going to be, then why are you going to go along with the Americans who are bound to the Israelis? I mean, they can't even—you can't even—I mean, the shock. I'd love to talk to these folks in Riyadh and Doha, you know, in Kuwait City or wherever, about this idea that you have the American Secretary of State and the National Security Advisor issuing his own MOU, carrying out his own foreign policy in direct contradiction of the president's agenda, the president's priorities. You're going to trust this country? You're going to trust what?

The Democrats are coming back in power and have Jake Sullivan as National Security Advisor again, or maybe this time as Secretary of State, right? You're really going to trust that? So, I mean, for their own sake, they need to do something different. And I think we're seeing that, right? We're seeing that with these rumors, these whispers, these meetings, like you're saying, the Qataris and the Saudis are talking with the Iranians about something. Right. We've certainly seen this Pakistani-Saudi relationship. The Turks keep coming up in the conversation in terms of a bloc with that.

The Qataris, they've all learned their lesson. Hey, you want to give—yeah, you can give Donald Trump a half-billion-dollar airplane. He's not going to take your phone calls. You know, I mean, so everyone, I think, hopefully has learned their lesson here and seeks to rely more on themselves and their neighbors now than on any external power. And like I said, I include Russia and China. Why would you think it's going to be any different with any outside great power? It's not. It's going to be the same. The color will be different. The details will be different. The anecdotes will be different. But it will be the same thing in the end.

#Nima

Rubio basically said the Anchorage formula is different, doesn't exist anymore. And then, right, the guy somehow reminds me—because no one has the sort of position that he's in other than Kissinger. Right, exactly, yep, yep. And the guy is not capable.

#Matthew

No, he's not Henry Kissinger. I mean, Henry Kissinger—I hope he's roasting and burning in hell where he belongs with all the other war criminals. But yeah.

#Nima

But he was a political animal. Exactly. Exactly.

#Matthew

Yeah. Yeah, exactly, Nima. Exactly. And Marco Rubio is not that. Marco Rubio is doing his best to notch up his fair share of war crimes. But, you know, he won't be sitting at the same table in hell as Kissinger. You know, he doesn't rate that. And, yeah, this is really—and one thing too, I mean, this idea that—I shouldn't be so—I shouldn't say it like that about Rubio, because Rubio has positioned himself by becoming also a national security advisor, by limiting his face on the news, right, by controlling what he wants to control. He has put himself in a position of power that maybe we haven't seen since Kissinger, because I remind people that the national security advisor has the ability to direct American forces. He's not in the chain of command. It's not like the president to the four-star generals, that type of relationship.

But the National Security Advisor certainly has that role. And this National Security Advisor can direct the Pentagon, the CIA, the State Department, whoever, to do what needs to be done. And so one of the things I was thinking about, Nima, is like, I don't think it's a coincidence that Rubio was over in the Gulf states last week. He didn't go to Riyadh, which I think is a big deal. And we could get back to talking about the Saudis and the Pakistanis and everything. But, you know, he's in Manama at the Gulf, at the GCC meeting and everything, and he's making all these boasts about how the Americans are in control and about how the Iranians will not be in control of the Straits of Hormuz. And then we see that ship try to go through—the Ever Given or the Ever Lucky, or whatever her name was, right?

And the Iranians hit it right away with a drone. And I don't think it's a coincidence that that occurred the day after Marco Rubio left the region, right? And then we saw that back and forth — the Americans attacked, the Iranians attacked back, the Iranians shot another ship — clearly showing the Iranians are in control, right? The Iranians dictated the terms of that engagement. They dictated when that engagement ended, they started it, they finished it, etc. You know, but I think Rubio is a very Machiavellian character, and, you know, I'm really afraid of what this portends in terms of a crisis within the administration, because he seems like he is willing to do what he thinks is best. Now, some of that is because of his loyalty to Israel. Certainly, I'm sure the AIPAC lobbyists have been calling his office nonstop.

But the other side is, this is what Rubio really believes. Rubio is an imperialist. He's a neoconservative. He has no interest in anything other than American dominance, American primacy. And so this agreement, this MOU, is anathema to him. People want to understand that, go back and

watch the video from the G7 when Donald Trump is doing his press conference, and just look at Marco Rubio standing behind him in absolute agony—agony—listening to the president say things like, well, everyone else in the region's got ballistic missiles, the Iranians should too.

I mean, if I had gone up and stabbed Rubio in the heart, he wouldn't have looked as pained as he was having to listen to the president that day. Right, so I think that, you know, unfortunately, it's not, as I said before, a novel you pick up in the airport bookstore. It's real, and, you know, who knows what it's gonna— you know, I don't know where it will go. Yeah, Matt, do you see the conflict in Ukraine escalating somehow? Oh, gosh. Yeah, I do. I don't see it going outside of the countries. I know there's a lot of talk about the Russians may attack, you know, European munitions facilities or whatever, munitions plants. I don't think that's going to happen at all. But certainly, the escalation into a greater destruction of infrastructure and a more increased targeting of civilians— I think that's what the remainder of 2026 is going to bring.

Certainly, we can argue about the efficacy of the Ukrainian drone campaign—how effective it actually is, is it having a real effect on the Russian economy, et cetera, et cetera—but it all misses the point. It's the perception that matters. And that campaign has reinvigorated European and American support for the war. It's brought the war back into Western media's attention. It's putting enormous pressure on President Putin and his government. And it's going to force him to respond in some way. The only way I can envision it is by an escalation of the conflict—by hitting more targets, by hitting things that previously the Russians hadn't hit. You know, these questions about why are the trains still running in Ukraine?

You know, I think that is a question that, you know, has rightfully been asked by Russians for the last several years. And so you'll see, you know, I would say, Nima, that on a scale of 1 to 10, 10 being the Israelis in Gaza, say, the Russians have been at about a 5 during this war. So the idea that they'll turn the dial up, and then, of course, the Ukrainians will respond. And at some point in the next year or two—we know this because you can read about this in the op-ed pages of the Wall Street Journal and The Guardian—the Ukrainians will have ballistic missiles. That's the next thing. And, you know, and then eventually you'll have this, as we had in the Iran-Iraq war, a war of the cities where both sides are just targeting each other's cities deliberately, provocatively, trying to demoralize the other side.

But we all know that really doesn't work in warfare, does it? It doesn't work at all. So the idea of just terrorizing them for the sake of terror, as well as to demonstrate to your population that this is what we're doing to them—yes, they did this to us, but look at what we did. And we can imagine where that goes. And so I think that's the way this war continues. I think the Russian plan is to take the rest of the Donbass, and whether they get that by—some people say the fall, other people say next year, some people say it'll take another 30 months based on the rate of events they have now—you know, I don't know. But I do know that when they do take it, it doesn't matter. The Ukrainians are not going to stop fighting, the Europeans are not going to stop fighting, and the Americans may have actually started providing support back to the Ukrainians.

The Americans are still providing support, of course—providing intelligence, and we sell weapons—but maybe we'll start giving money back to them, you know what I mean? Because even if the Russians take the Donbass, that then, for Brussels, for the EU, and for NATO, becomes their Jerusalem, right? And just as you have had this crusade to defend a democracy against an authoritarian tyrant for the last four years, that's the way they've sold it in all those capitals in Europe. That's how Joe Biden—go back about two years, go back to September 2021, not even more than two years ago, almost three years.

Go back to September 2023. Joe Biden's first reelection campaign ad is about him going to Kyiv, him as Joe Biden, a wartime president. Right. I mean, so that is all there. That playbook's all there. Those plans, those scripts are already written. So let us go back to that. And where will we be? We'll be talking about this a year from now, two years, three years, unless something happens unforeseen. There's some type of black swan event, some force majeure, or, you know, something occurs. I don't see this war ending. I just don't. Yeah. Yeah.

#Nima

I think West Asia is the same. I don't see the war ending anytime soon. Right.

#Matthew

I mean, unless you get to the core, right? Unless you get to the core issue, unless you get to the fundamental problem here. And in this case, in West Asia, the Middle East, it is Palestine. And this is the same thing too. You could say the same about India and Pakistan until you figure out Kashmir, right? And I shouldn't really say much about that because I really don't know enough about this either way. But until you figure that out, you know, you are always going to have a steady Cold War occurring there, with the danger of it going to a real war. And yeah, I mean, I think the best case that you have is—I don't even see this best case happening—but the best case was that you would get a frozen conflict. The war is frozen. And everyone would be, oh, it would be like Korea. That's been a frozen war for 70 years now. No, it won't be like Korea. And so I just don't know. It's different. Yeah, it is very different, yeah.

#Nima

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

#Matthew

Yeah, absolutely. Thank you, Nima. And everybody who's watching, like and subscribe, leave a comment, help Nima continue to get more viewers, and follow Matt on his Substack.

#Nima

matthewhoh.substack.com. Go there and follow him.

#Matthew

Thank you, Nima.

#Nima

Thank you.