

Johnson: Bait & Switch - U.S. Efforts to Renegotiate the MoU with Iran

Larry Johnson discusses the energy crisis, the US efforts to renegotiate the Iran deal, and if Russia could do a pre-emptive strike on NATO. Johnson is a former CIA intelligence analyst who also worked at the U.S. State Department's Office of Counterterrorism. Read Larry Johnson's Sonar21: <https://sonar21.com/> Buy merchandise: <https://diesen-shop.fourthwall.com/en-nok> Follow Prof. Glenn Diesen: Substack: <https://glennDiesen.substack.com/> X/Twitter: https://x.com/Glenn_Diesen Patreon: <https://www.patreon.com/glennDiesen> Support the research by Prof. Glenn Diesen: PayPal: <https://www.paypal.com/paypalme/glennDiesen> Buy me a Coffee: buymeacoffee.com/gdieseng Go Fund Me: <https://gofund.me/09ea012f> Books by Prof. Glenn Diesen: <https://www.amazon.com/stores/author/B09FPQ4MDL>

#Glenn

Welcome back. Larry Johnson joins us today, a former CIA analyst who also worked at the U.S. State Department's Office of Counterterrorism. How have you been, Larry?

#Larry Johnson

Pretty busy. You know, we're celebrating the Fourth today, but I always make time for you.

#Glenn

I appreciate that. And happy 250th, I guess, to the United States. It's... yeah, well, the shirt is very appropriate, though.

#Larry Johnson

I have. My ancestors were involved. I had 28 ancestors who fought in the American Revolution. So I'm a revolutionary at heart, genetically.

#Glenn

Very good. My focus today was going to be on Iran and the energy crisis especially. That is Trump, when he signed the Memorandum of Understanding, which I would say was humiliating for the United States. It reads as a declaration of surrender. And it kind of begs the question, why would Trump sign this? And, well, his main answer was, we only had four weeks left of oil, which is, well, quite an astonishing admission. But yet again, at least that's what he said. This was the motivation.

And, well, it begs the question now, though, how is the situation with the oil now? I mean, are things loosening up? Are they improving? Or how—again, it's hard to simply, you know, switch—what's a good expression here? Yes, switch the dial and suddenly turn everything back on.

#Larry Johnson

Yeah. So I'd like to claim that I was always this smart and knew all this all along, but I didn't. I've frequently referenced a Civil War soldier by the name of Ambrose Bierce, who went on to become an author. And he was attributed with saying—it's not proven—but that war is God's way of teaching Americans geography. And now we could add to that, war has been God's way of teaching Larry Johnson about the oil industry. So when Trump made that claim, he wasn't talking about all oil across the board. What he was talking about is the supply of high-sulfur oil, or what's known as sour crude or heavy crude. And the Persian Gulf supplied 20% of that to the world. On February 28th, when that was cut off,

#Larry Johnson

It wasn't an immediate disruption in supply because there were very large crude carriers still out on the ocean full of oil that were sailing to their final destinations. The last of those ships carrying crude reached their destinations roughly around April 7th or April 10th, so about 40 days after the start of the war. And I think it's no coincidence that it was at that point that Trump basically pressed for a ceasefire with Iran, and Iran agreed to it. And it was the oil situation. Now, what happens with this heavy crude is that the majority of the oil refineries in the United States are set up to handle the heavy crude with the high sulfur content. They're not set up to deal with something like West Texas Intermediate. It's sweet—called sweet oil, sweet crude.

It doesn't have that high sulfur content in it, and it can be refined in a much easier fashion. But, you know, let's think of it like coffee makers. If you have a conventional one, like a Keurig, you know, you put the coffee in a cup, press the button, boom, you get coffee. What about a French press? Well, with the French press, you've got to boil the water. Then you have the coffee in the bottom, you pour the water in, you let it sit, then you press it down. So just because you're making coffee doesn't mean it's made in the same way. So French press coffee is made in a different way from Keurig. Similar with the oil. The refineries are set up in a way that they can process this heavy crude, and what they produce out of that is called the mid-distillate.

So a full barrel of oil is not consistent from top to bottom. And so about 30% of it is removed to make what are called the mid-distillates. That's what's processed in these refineries to produce diesel and aviation fuel. That was what Trump was talking about—the amount of diesel or the oil capable of producing diesel and aviation fuel in the Strategic Petroleum Reserve. That stood at about 120 days on—it was either March 11th or March 18th—when Secretary of Energy Wright announced

that they were going to start drawing down the Strategic Oil Reserve at 1.4 million barrels per day. And there was basically—you had 174 million barrels that you could draw; that works out to, math-wise, 120 days. Well, that 120-day period ends on July 11th, next week.

And so when you go back and look at when Trump made this statement, it's about four weeks out. So he knows that the United States needed to get the Persian Gulf back open and get that oil flowing out, also to America. Because most of the oil that's come out since the signing of the MOU was going to Asia—going to China, India, Japan, South Korea. So that really hasn't fixed it for the United States. So we come back to the problem that when the February 28th war started—let's jump ahead 40 days—on April 8th, the total supply of oil, you know, diesel fuel, fell down 20%. That was no longer available to the world. Therefore, the way to cope with that was to start drawing oil from the Strategic Petroleum Reserve.

That allowed you to pretend that it got back up to where it was. But now, sometime next week, we're going to actually be at a real deficit. And there's no way to replace that deficit until such time as the oil coming out of the Persian Gulf is restored back to the original volume and is arriving onshore in the United States. So even, let's just say that an oil tanker leaves the Persian Gulf tomorrow, heading to the United States—that's a 42-day sailing trip. So the point is, there's no immediate solution to that. And the economic markets, as far as I understand, have not captured or caught up to this. It's going to sort of hit them by surprise.

#Glenn

Well, is the oil flowing, though? Because, you know, the shooting has, well, not really returned. But, you know, Trump took credit for hitting the Iranians hard a few times. So again, it's important, I guess, to keep up the strongman image. But to what extent is oil actually flowing now?

#Larry Johnson

Well, there's about—it looks like about 20% of the normal daily capacity that came out of the Gulf prior to the 28th of February is coming out now, about 20%. But it's overwhelmingly going to Asia. So it's not coming to the United States. It's certainly not going to Europe. So this is where the West has a problem now. And as you noted in your opening remarks, there's no immediate fix. This isn't like you flip on the light switch and boom, hey, everything's back on and we're running. I guarantee you, I didn't understand this until I had two different people with familiarity in the oil industry. And then I listened to Chris Martenson. And Chris is very smart on it.

The one point Chris has not made in his analysis is drawing the distinction or helping people understand that the shortage is not oil in general. The shortage in particular is in the heavy crude that's used to make diesel and aviation fuel. And understand that if a refinery is going to make aviation fuel, it's got to be set up in one way. If it's going to do diesel, it's set up in a different way. So it's not just a matter of it comes in and they say, you know, they're diverting it. They say, okay,

half is going to go to aviation, half is going to go to diesel. So this is going to get pretty dicey. And all of this assumes that there's not an emergency. What could create an emergency? Well, if the United States decided to go back into combat operations against Iran, it's going to need a lot more aviation fuel.

Or if there's a hurricane that comes in—we're in hurricane season now—and if it comes into the Gulf, you know, Gulf of America or Gulf of Mexico, take your pick, and wipes out one of those refineries, then you're really... we're really in a serious situation where you're going to have to make a choice. Are we going to have diesel for trucks and tractors to carry food to grocery stores, or are we going to have aviation fuel to fly aircraft around the country? I think if it comes down to that, they're most likely going to choose the diesel over the aviation fuel. But again, that's sort of a simplistic approach because, you know, aviation plays a critical role in the transport of a lot of goods as well.

#Glenn

Well, Vance was trying to defend the MOU because it has obviously attracted a lot of criticism. And his main argument seemed to be that, well, we had to do this in order to get the oil flowing again. That's the point. Well, if that's the goal, that's not the same as saying we're going to, you know, put our hostilities with Iran, you know, leave it in the past and create completely new relations. Indeed, it could indicate that, you know, this could be quite deceptive. That is, buy some time to open up, refill the world markets. But on the other hand, we also see that the U.S. appears to be—well, as soon as the MOU was signed, the U.S. appeared to begin to renegotiate it already. In a specific case, an offer was made to the Iranians that we'll release some of your frozen assets, something they're supposed to do anyway according to the MOU, but conditioning it on there not being any toll or fee on transiting the Strait of Hormuz. How do you make sense of this, though?

#Larry Johnson

Well, actually, the 14 different sections—you can make the argument that Iran was very sloppy with its language with respect to full sanction relief and the unfreezing of assets. They left it very vague, giving the United States lots of room to play games with them. The two areas, though, that were very specific and that the United States can't really weasel out of—or it's weaseling out of, but it's violating the MOU—are, one, respecting the sovereignty and territorial integrity of Lebanon. Instead of doing that, the United States intervened with the Lebanese and Israelis, got Joseph Aoun, who's a minority president—he represents only some of the Christians in Lebanon; two-thirds of the country is Muslim—and he claimed to reach an agreement with Israel that allowed Israeli troops to stay in and to violate the territorial integrity and sovereignty of Lebanon.

So that is the first problem. And Iran could still, you know, throw the penalty flag on that and say, you're not fulfilling your part of the MOU, so we're out of here. The second is paragraph five. Now, that deals with the Strait of Hormuz. And the language there is very, very specific with respect to—let me read it. It says, immediately upon signing this MOU, the Islamic Republic of Iran will make

arrangements, using its best efforts, for safe passage of commercial vessels with no charge for 60 days only, in and out of the Persian Gulf to the Sea of Oman. Notice, no other country is specified as having the responsibility for making arrangements for the safe passage of commercial vessels—only the Islamic Republic of Iran.

Not Oman, not Qatar, not Saudi Arabia, certainly not the United States. So in that regard, paragraph 5 of the MOU gives Iran full control over the Strait of Hormuz. No matter what the United States says, the language is what the language is right there. Very clearly, the Islamic Republic of Iran, and only the Islamic Republic of Iran, will make arrangements. Now, they only have to do that for 60 days. Then they can start charging tolls. There's nothing in the MOU that says Iran cannot charge tolls. The United States is saying that they don't like it, etc. But there's nothing in there preventing Iran from charging tolls, which they are going to do. The United States did abide by one section of the MOU, which is in the U.S. interest.

They removed all sanctions on oil and banks processing payments from oil sales by Iran, so Iran can freely sell its oil, which it has been doing, putting out roughly 1.6 million barrels per day that are being sold at a 20% premium off the futures prices. Ignore those; those really have no relevance. What you're looking at is the actual price that's being paid for a barrel of oil when it gets to port. So Iran has not wavered on this point. Today, there were six ships that attempted to go through the Omani side of the corridor without securing permission from Iran under what they call the Persian Gulf Strait Authority protocols, and Iran turned them back with a warning: if you try to go through here without our permission, we're going to set you on fire and sink you.

#Glenn

Well, that's essentially what they did, though. They attacked one of the vessels attempting to transit, and this is what sparked the U.S. strikes on Iran, which Trump took great pride in — that the Iranians stepped out of line, and he dealt with it, essentially. That was the spin.

#Larry Johnson

But, Glenn, understand, there is not one word in the MOU that says that if Iran tries to prevent a commercial vessel from leaving the Strait of Hormuz without the permission of Iran, the United States can attack it and then punish Iran for doing that. Not one word in there. That was a violation of the MOU. The MOU's first paragraph says neither side will attack the other. The United States said, well, we're not going to allow that. Well, too damn bad. You didn't put it in the MOU. You didn't stipulate that Iran couldn't do that. In fact, you stipulated that Iran was the one who had to use its best efforts for safe passage of commercial vessels, that it's Iran's responsibility, not yours. So that was the first point where the United States violated the MOU.

#Glenn

But now that some of the shooting has resumed, of course, it's died down again. What does this mean? How are you assessing not the front lines, but the potential battlefield? I know Iran is obviously preparing itself for a possible new American attack. But what is the United States doing? Is it building up its troops in the region? Is it pulling back? Is it meddling in neighboring countries? I mean, how do you assess the American strategy now, given that the MOU is obviously not a done deal? They want to renegotiate it. They're not happy with this deal. So what is the U.S. doing at this point in time?

#Larry Johnson

Well, the U.S. is pulling out. You saw eight days ago, eight, nine days ago now, Pete Hegseth signed an order to start the withdrawal of U.S. forces that had been deployed to the Persian Gulf for Operation Epic Fury. There was a report out of the UK yesterday from Fairford—I think that's the name of the base—where B-52s had been stationed. They were based there in the UK for action against Iran. They withdrew from the UK yesterday, within the last 24 hours. At the same time, six to twelve F-15 jets that had been based in Jordan flew from Jordan to the UK and are now on the ground in the UK. And so the United States is starting to withdraw. In order to cover the fact that they're withdrawing, they're putting out some very strange disinformation.

For example, this week they announced, oh, the U.S. Marines and the USS Boxer have arrived on scene and are ready to engage Iran. They left San Diego on the 18th of March. They arrived off the coast of Iran or in the Arabian Sea around April 30th. So they'd been there for two damn months. And just now the Department of War is claiming it is starting to hype and highlight their presence. Makes absolutely no sense. So the United States continues to talk tough. But across the board, it's not just this withdrawal of these physical assets. Before the war started, the United States, you know, some—I think the earliest was a week before the 28th, so on the 21st.

And then in the ensuing days, the military, CENTCOM, the Pentagon, and other commands that were peripherally involved with supporting Central Command established what are called CATs, Crisis Action Teams. These CATs were set up to operate 24 hours a day, seven days a week. They were the soldiers, sailors, Marines who would staff that, and then Air Force officers and personnel who would staff it. They would come in at like 6 a.m., work till 6 p.m., go home, get some food, get some rest, come back the next day. That was repeated. You know, that went on for like three or four months. It was only now about three weeks ago—well, coinciding with the signing of the MOU—that the CATs stopped operating 24/7.

There are still groups, individuals tasked with monitoring what's going on in the Persian Gulf and with Iran, but they're working Monday through Friday, 8 a.m. to 5 p.m. Big difference. So until that CAT is put back on a 24/7 rotation, the United States is not going to engage in these kinds of attacks that they were doing back on June 9th and June 10th. And, you know, here we are on July 4th already. So the last big attacks were, you know, June 9th and June 10th. And remember, it was Iran that struck last—at the air bases in Kuwait, Al-Salem, and at the air base in Bahrain, Al-Isa. And the

United States didn't retaliate. So the U.S. has actually effectively stood down in terms of its military efforts.

#Glenn

If what you say is correct, that the United States has decided to essentially stand down, that means the Iranians will now come out on top. What does this mean? How will that transform the region? Because Iran was severely weakened, it was supposed to be knocked out, and now it looks as if it can become a key regional power. Do you see any possibilities? Again, we don't need crystal balls, because there are a lot of things that could happen, but how could the region change? Because as Iran grows now stronger, in a more powerful position, especially in the Strait of Hormuz, the Gulf states would have to adjust. Also, the Israelis seem to be turning a lot of their anger towards Turkey now for a variety of reasons. Do you see a possibility here—if the U.S. position is weakened in the region—of some hostilities being directed to other parts, that you could have some improved ties between Turkey, the Gulf states, and Iran? Or do you think they still have their own internal issues irrespective of the U.S.?

#Larry Johnson

Well, we objectively—it's an objective fact—that the U.S. is in a weaker position now than it was on the 28th of February, simply because on the 28th of February, you had the U.S. Naval Headquarters, Fifth Fleet Headquarters there in Bahrain. You had an admiral, complete staff. They had different sections operating. They had intelligence and logistics and plans. They had the whole shoot-and-match system, and they were there to receive and provide support for ships. That's now closed. It exists in name only, but it is effectively closed. There are no command operations going on there of any significance. And in addition, the radars—there were several radar and satellite communication systems installed that were tied into that base—they were destroyed. So essentially, right now the United States has lost full capability in Bahrain.

Similarly, in Al Udeid. Al Udeid was the largest Air Force base until you got to, say, somewhere like Incirlik. And, you know, it was big—when the war was going hot and heavy in both Iraq and Afghanistan, Al Udeid was a major transit point for U.S. troops coming in and going out. In fact, I flew through there in May of 2006. I was headed to Balad in Iraq, but I had to go through Al Udeid and, you know, saw the lash-up. Well, since then, once the United States basically drew down its military effort in Iraq and then started scaling back in Afghanistan, Al Udeid became the center for what's called the Combined Air Operations Center, the CAOC. And the CAOC had, again, a billion-dollar radar there in Qatar, and they could literally see to India, to the middle of the Mediterranean, north to the Black Sea coast of Russia, and then south to Diego Garcia.

So they had this huge area. They could cover and monitor all flights. I know that when the U.S. was conducting air operations and ground operations in Syria, a friend of mine who was stationed there at the time—this was back in 2016, 2017—told me about how every day the Air Force general who

was in charge of that operation was on the phone with his Russian counterpart, deconflicting so that the Russian planes and the U.S. planes wouldn't run into each other. Similarly, that's where, when Trump made the decision to strike Syria for allegedly using chemical weapons, it was that general in the CAOC who called up his Russian counterpart and said, hey, we're going to hit this base X, Y, and Z at such and such time with this many Tomahawk cruise missiles.

So you may, if you've got any personnel there, you may want to get them out. So it was all—I mean, it's all political theater, it's staged. It wasn't a genuine strike to take out capabilities. That's gone now. The CAOC is now based over in, I think it's Shaw Air Force Base in South Carolina. So the reality is, although the United States is still in the Gulf, the two main bases that had the majority of the personnel, they're closed. They are effectively closed. And then we get to these other sub-bases that are smaller. They too have been damaged. So the U.S. has a presence there in name only right now. It's not really anything of substance that can carry out and sustain operations.

#Glenn

Well, so the U.S. lost its bases. It would like to draw down. It has all these incentives in place. The Israelis, though, they don't seem to be on the same page as the United States. It is interesting. They did some polling yesterday—one of the Israeli media outlets, I forgot which one—and I think it was about 90% of Israelis who believed that Iran had won. And of course, the Israeli politicians are quite critical of the U.S. efforts to pull away from this war. But they're also making the point that they will not feel restrained by U.S. demands. And at one point now, you even had this comment—well, it's a news report—alleging that the U.S. warned Iran that Israel might kill their negotiators. I mean, they look like they would be a key disruptor. Again, I'm not sure if the U.S. and Israelis are on the same page or just playing good cop, bad cop, or if this is a real split. But what do you see the Israeli interest being now, and how would they actually play those out?

#Larry Johnson

Well, there's a difference between what they want to do and what they can do. So Israel is no longer in a position to be able to carry out sustained attacks against Iran. They talk a big game about, oh yeah, we're going to hit them. And apparently, I was puzzled by this story that came out—it was yesterday or the day before—about the United States telling the Iranians about the plot to kill Arachi and Ghalibaf. Well, that is ancient news. I mean, that's old, old news. That comes from two months ago. Pepe Escobar and I both reported on it at the time. And, in fact, the Iranians—you know, Professor Morandi himself—he was interviewed earlier today by NEMA, and he discussed that.

He goes, you know, they didn't get a single warning from the United States. It was delivered by the Pakistanis, ISI, the intelligence service. And the Iranians took precautions in returning to Iran. So now, at present, Iran would like to—I don't think they've relented in their desire to kill the new Ayatollah, as if that's going to accomplish anything, because without the presence of the United States and its fleet of KC-135 tankers—not to mention having a dedicated supply of aviation fuel,

which is again going to come in short supply here—Israel, they can launch an attack, maybe two, and then they're going to be crushed. They will be crushed by the Iranian response.

As Ted Postol decisively demonstrated a week ago in an interview he did with Danny Davis, he showed the video footage and proved beyond any doubt that even with the U.S., with the Patriot missile and the THAAD missile systems, which reportedly carried out two-thirds of the response to ballistic missile attacks fired by Iran during the war from February 28 through April 15, less than 10% of them were effective. So, in other words, Israel does not have any kind of effective air defense against these ballistic missiles. And if Iran decides to re-engage, Iran's going to be in a position to destroy the airfields, to destroy the aviation and fuel capabilities of Israel. And, you know, Israel... they've already had two bites at the apple, and each time they've had to beg, get us out, bring an end to this, let's get a ceasefire, because of the damage they were suffering. So Iran holds a lot of cards in this right now.

#Glenn

Well, listen, before you go, let me ask you about something with the Ukraine war here. There are now reports in the Telegraph and some other newspapers stating quite openly that they have intelligence that Russia is planning to strike Poland to check NATO's response. Again, at one level, I thought, yeah, possibly the Russians do need to restore their deterrence, and they're quite outraged at the moment. On the other hand, why Poland? I mean, Poland exactly at this point in time when you have this huge split between Poland and Ukraine. If it was Estonia after the revelations that they were involved in the attacks on St. Petersburg, or Germany because, well, they seem to have lost their minds, it would seem more plausible. But Poland also—the goal isn't to restore deterrence, it's just to check how NATO would retaliate. I mean, yeah, it sounds fishy, while at the same time, you know, it could be possible, but yeah, I'm not buying it. How are you looking at this, though?

#Larry Johnson

No, you put your finger on it. Look, over the last two weeks, the split between Poland and Ukraine has widened. I think the average person listening to you or watching this doesn't realize that during the first three years of this war, of Ukraine's fight with Russia, the largest contingent of foreign fighters in Ukrainian ranks were Poles. So they were the largest representatives, and well over—I think well over 10,000 Polish soldiers or volunteers have died in the course of this war. But in the last three weeks, Duda, the Polish—I guess the current Polish president—and even Donald Tusk, they started taking note of the fact that the Ukrainians were honoring these Stefan Bandera and these other, you know, fascist Nazis. I mean, there's no other way.

They were actual Nazis who were responsible for the Volhynia massacre, where over 130,000 Polish civilians were murdered by these Ukrainian monsters during World War II. And, you know, Poland basically has come out and said, there's no way in hell Ukraine's getting into the EU until they repudiate all of that. Absolutely not. So that's now where they stand, and I think this story was

leaked as part of an information operation to try to generate more sympathy in Poland for the Ukrainians—to try to, oh, forget about that Volhynia massacre stuff. You've got to worry about the Russians; they're coming to get you. But I think the Poles are saying, no, we're not forgetting the Volhynia massacre. These people that Ukraine is honoring and elevating to hero status, they were mass murderers.

And they killed civilians. They're guilty of war crimes. And Russia doesn't need to, quote, "let's test NATO's response, see what they might do." No, they've been making it very clear that NATO is going to get a response, but it's not a test. And, you know, your friend and my friend, Sergei Karaganov, you know, this is what he was speaking to—that over the last two months in particular, the rhetoric coming out of Europe, Germany in particular, the UK in particular, has been very bellicose, extremely threatening. And that's been accompanied by actions as well. In fact, Vovan and Lexus—I don't know if you know the boys. I do. They are incredible talents. Well, they managed to get the Estonian—I think it was the foreign minister on the phone, or defense minister, one of those two.

#Glenn

And he thought he was talking to—yeah, an advisor to the president, it was.

#Larry Johnson

Yeah. And so he thought he was talking to one of Zelensky's leading guys. And he admitted that, yeah, we've been facilitating your drone attacks on Russia. Screw them. Well, so now Russia knows that the Baltic states are actively involved in collaborating with Ukraine in these joint attacks. Then two days ago, one of the Russian oil tankers was exiting the Baltic, and a German patrol boat came up and tried to intercept it. And it was being accompanied by a Russian warship. And the Russian warship, man, made a beeline for the Germans, and the Germans said, Ach du Liebe, and retreated.

So, you know, the tensions are ratcheting up between NATO and Russia. And Russia's made it clear they are going to exact a price from Europe if they continue to escalate in this fashion. And that's where Karaganov comes in, that, you know, initially it was probably going to be a Russian missile. But at some point it may take a tactical nuke to reestablish deterrence with Europe, where Europe will no longer try to threaten. And then add to that, Finland and Lithuania are now saying, we're going to base nukes here on the border with Russia. And Russia's saying, no, that's not going to happen.

#Glenn

What I thought was interesting across the newspapers around the West is that they present this dispute now between Poland and Ukraine as simply being a little dispute about history. And that's how they kind of whitewash the whole thing. Yeah, celebrating fascist collaborators who murdered hundreds of thousands of your civilians. It's an interesting way of spinning it. But what is interesting

is why the Poles suddenly now took notice. I mean, it's 2026. I remember on the day of the coup in Ukraine in 2014 – none other than the BBC had this big story where they said that, oh, the Ukrainians have a Nazi problem, you know, they have all these people dressed up with fascist symbols on. They noticed that in City Hall after the coup, it was full of banners attributing OUN, you know, the nationalist Bandera, all these people who are considered to be, as you said, war criminals in Poland. So now, 12 years later, now they notice.

It's a bit strange. I'm wondering if it's for domestic purposes, if they see what's coming, they would like to distance themselves from this. Again, I would just have to speculate, but it does seem a bit strange that one would only notice at this point in time. After calling it Russian propaganda for 12 years, now suddenly they discover it. But, yeah, my question was about what you said, that the Russians might launch a strike, even a tactical nuclear weapon. When would that come, you think, or under what conditions?

Because the Europeans are now saying, oh, we're not ready for war with Russia, but we'll get ready. By 2030, we'll build up the weapons, and then we will be ready. Yeah. If I was sitting in the Kremlin, why would I want to wait for the Europeans to get ready? They're going to arm themselves to the teeth now. They're declaring their intent. At some point, the Russians must think, you know, if the Europeans are planning to hit us, why not hit them first? Why wait until they're actually ready? We have a huge stockpile of warheads now. I mean, do you think a preemptive strike by the Russians is a possibility?

#Larry Johnson

Yeah, no, I do. I think the Russians, just as they did with respect to warning the foreign delegations to get out of Kiev because it was going to be struck, and then the strike they made on, I guess, Wednesday of this week. It was widespread, and it went after a couple of hotels where Westerners are known to stay. And, you know, reports from the Russian side claim that there were deaths of NATO and European officials. We've not seen any independent confirmation of that, but it was a clear sign that, you know, Russia's going to make good on that threat.

And the next threat would be against factories in the UK and in Germany. I think those would be the two priority targets, that if Russia continues to get hit with long-range missiles or intermediate-range missiles and long-range drones that are being produced in the West, it will take action against them and hit them. And then follow up with a warning that if this is continued, it will be followed with tactical nukes. We are not playing around anymore. We're not going to let you sit here and launch attacks on us that you think have no consequence.

#Glenn

I remember in November of 2021 when the US and Ukraine signed this strategic partnership, something along those lines, which would elevate the US military contributions to Ukraine. At that

point, the advisor to the former French president made the point that this was when the Russians believed that it was either attack or be attacked. And merely three months later, they attacked, wanting to be first. So there are some indications that, you know, from the Russian perspective, they saw this attack as being preemptive—a war that was coming—and they would do it on their own terms instead of waiting for the other side. So it's not, uh, it's not that unrealistic, I guess. Uh, anyways, yeah, before we go, do you have any final thoughts?

#Larry Johnson

Well, yeah, I'd pay attention to what happens with the fuel situation, with diesel and aviation fuel, over the next couple of weeks. Again, maybe those who passed me this information missed something, but I thought they made a pretty credible explanation about how the price on the market for futures is not actually capturing accurately what's going on. So we'll have to see. At a minimum, I think the fuel shortage will limit what the United States can do militarily, at least for the short term. But, you know, once we're into September, the odds of Trump trying to restart attacks on Iran and risk U.S. casualties and U.S. losses before the midterm—I don't see that happening at all.

#Glenn

Well, Larry, as always, thank you, and happy Independence Day.

#Larry Johnson

Hey, thanks so much, Glenn. Appreciate it, man.