

Pepe Escobar: Missiles DESTROY Saudi Oil Tankers, US Bombers SURGE to Iran!

Pepe Escobar discusses the Bab el-Mandeb Strait on fire as Yemen strikes Saudi tankers carrying 500,000 barrels of oil and Iran prepares for a US B-2 bomber attack with devastating strikes of its own on US bases. Pepe on Telegram: <https://t.me/rocknrollgeopolitics> Pepe on X: <https://x.com/RealPepeEscobar> Transition Protocol: <https://www.youtube.com/@UCewRbK22LRnNi6N3EcGjbow> <https://strategic-culture.su/news/2026/07/22/exclusive-iran-pakistan-what-really-happening-in-diplomatic-front/> Subscribe for more in-depth geopolitical analysis! Leave your thoughts in the comments below! Support the Channel: Patreon: <https://www.patreon.com/dannyhaiphong> SUBSCRIBE ON RUMBLE: Rumble: <https://rumble.com/c/DannyHaiphong> Follow Me on Social Media: Twitter: <https://twitter.com/DannyHaiphong> Telegram: <https://t.me/DannyHaiphong> Support the channel in other ways: <https://www.buymeacoffee.com/dannyhaiphong> Substack: chroniclesofhaiphong.substack.com Cashapp: \$Dhaiphong Venmo: @dannyH2020 Paypal: <https://paypal.me/spiritofho> #Iran #Yemen #SaudiArabia #trump

#Danny

Welcome back to the show, everyone. As you can see, Pepe Escobar is here joining me to break down the latest news, where we begin with Yemen. Last night, overnight, Yemen struck two Saudi oil tankers, the *Insalya* and *Layla*, with ballistic missiles and drones. They also turned back nine others, this report says, 10 total since the blockade began in the Red Sea. These tankers that were struck were carrying 500,000 barrels of oil. And to make matters worse for Saudi Arabia and the U.S.-led petrodollar system, two Chinese-owned tankers carrying around 4 million barrels of crude, Saudi crude, from Yanbu were allowed to pass through the Red Sea.

So we have some interesting selective developments there. \$100 per barrel oil is back on as Yemen's blockade, as well as Iran's successful retaliation to U.S. strikes, continues the war unabated. Now, Pepe, I know that you're writing about this, Iran's retaliation to U.S. strikes. The United States struck Iran for the 12th straight night. Iran retaliated, saying that it struck another U.S. base in Jordan, the King Faisal Air Base, hitting a THAAD defense radar system, missile defense radar system, a Patriot system, and other radars and heavy military equipment like helicopter hangars.

Iran also says that it hit Kuwait very hard. There were reports that a power station was hit in Kuwait, but the IRGC says that it was munitions, logistics, fuel storage, and ammunition depots hit. So, Pepe, this is a major development, the Yemen blockade. We also have Trump saying that he's ready to go further against Iran, telling Israel that this could happen at any point in the next coming days.

B-2 bombers and the like likely going after Pekkah Mountain and other nuclear sites. But I'm curious, what do you make of this major move by Yemen? And how does it fit into the overall scheme of the war?

#Pepe Escobar

Okay, good to be with you, Danny, good to be with our global audience, of course, here from my garden in the middle of NATOstan. A little bit of protection against all the horrors upon us. Eilat! When I saw that, well, in my mind, my mind was playing "Layla" by Derek and the Dominos, with some absolutely extraordinary solos by Eric Clapton. So this is what these things do to baby boomers like myself. And Layla is a very important name in the Muslim world as well. Well, Yemen, one of my favorite subjects, as many of you know. And this week, earlier this week, I had the chance to ask one of my dearest Yemeni friends, why now? Why are you blocking? You're not blocking the Bab al-Mandab, of course.

You're blocking the Bab al-Mandab to Saudi Arabia, the Red Sea and the Bab al-Mandab to Saudi Arabia. And we'll be back to it. By the way, very, very important, and this was confirmed. Apparently, the Saudis in Muscat, in Oman, made a sort of a proposition to the Yemenis, and that was refused point-blank immediately, like some sort of accommodation. This happened two or three days ago. But earlier this week, my Yemeni friend, his answer was absolutely extraordinary and, for many of us, I would say, unpredictable and unexpected. He said that Yemeni intel, which works closely, of course, with Iranian intel, but they are totally independent, as I had the privilege to see by myself last year when I visited Yemen.

They came to the conclusion that the Americans are ready to launch a massive operation, but not only against Iran, as the vociferator-in-chief has been saying lately. It would be against the whole Axis of Resistance. This means Ansarallah, Hezbollah, Iran, Hashd al-Shaabi in Iraq. So they conceived this blockade against the blockade, or, if you read the official Yemeni statement, a siege against a siege, as a preemptive move against this American attack, this possible American attack. There are rumors all across West Asia that this could be tomorrow night, in the middle of the night, Friday to Saturday, early morning, middle of the night Saturday in West Asia.

#Pepe Escobar

And this preemptive move was something that they had already calculated before, but then chose this to be the right moment. After those two fateful flights, Mahan Air flights, Iranian Airbus, Iranian pilots, first they broke the blockade by first going to Sana'a, flying from Tehran to Sana'a to pick up the Yemeni delegation that was transported to Iran for the funeral rites of Ayatollah Khamenei. And then again, they broke the blockade all over again, flying from Tehran to Sana'a to return a great deal of the Yemeni delegation, plus other Yemenis who were in Tehran or other parts of Iran for several reasons. The plane was absolutely packed. So, returning to Sana'a, as the plane was approaching Sana'a International Airport, the runway was bombed by the Saudis.

And the pilot, a real hero, had to do a Hail Mary, 90-degree turn west, and he landed at Hodeidah Airport by the Red Sea. And once again, I never cease to repeat this: it was really a miracle from God, because the runway of Hodeidah had been repaired only a few days before. If there was no runway, he would crash in the Red Sea, literally, with all his passengers. So after that, the Yemenis went two to one immediately. So they attacked us, okay, two to one. So they attacked a Saudi military base and a Saudi civilian base. And they said there will be more. And this "there will be more" is now the start of the blockade of Saudi ports in the Red Sea, especially Yanbu, because Yanbu is where the East-West Pipeline arrives.

And from Yanbu, the Saudis can export 4.5 million, more or less, barrels of oil a day. Now they cannot. They have to go through Suez and do a circumnavigation of Africa to provide oil for their Asian customers. A nightmare for everybody. But that's it. That's the only way for them, or they are stuck. And there are dozens of Saudi tankers stuck around Yanbu, all oiled up with nowhere to go. But it gets better. If you are a Saudi tanker, if you are exporting oil to China, you can leave Yanbu, you can cross the Bab al-Mandeb, and you can keep going. If you are a Western tanker transporting Saudi oil to anywhere, forget it. That's it. The Gate of Lamentation, Bab al-Mandeb, is closed to you. And there's no plan B. So, once again, why now?

Well, first of all, they can finally impress upon the Saudis that the illegal blockade of Yemen, which has been going on for 11 and a half years, has to go. Totally illegal. And by the way, there is an MOU between Riyadh and Sana'a. And by bombing the Sana'a International Airport, the Saudis broke the MOU. So now the Yemenis are saying, okay, you break it, we break it as well. So now this MOU has gone up in flames as well. So this is point number one, their reply to Saudi Arabia, direct reply to Saudi Arabia. And now they are imposing the conditions on Saudi Arabia for any sort of agreement. This has to be solved diplomatically. The Pakistanis already—this is very, very important as well—the Pakistanis already told the Saudis directly, and they have a military pact.

Very, very important: stand down. This was confirmed by our—Larry and I—our Pakistani mediator sources in Islamabad. Because Pakistan, the last thing they need at the moment is to be dragged into the war alongside Saudi Arabia against the Axis of Resistance. It's not only against Yemen; it will be against Iran as well. And it took them months to conquer Afghanistan. Iran trusts Pakistan especially as trustworthy mediators. It's a very complex process, but essentially they keep talking. In the beginning of this week, there was an Iranian delegation in Islamabad discussing very, very serious issues. So the Pakistanis are not blowing that up because the Saudis made an absolutely stupid move like this one.

Much, much more, the big picture of this thing is that the Yemenis may have preempted a little bit of this possible American attack against the Axis of Resistance because they introduced a new issue, a new vector in the equation that complicates the whole thing immensely, which is Bab al-Mandab. So there is already a partial blockade of the Bab al-Mandab, which is already, in terms of the global economy, an extra disaster. Everybody was waiting for, when are they going to block the Bab al-

Mandab? Okay, this is, what, 20%, 30%, 40%. You ain't seen nothing yet, but it will come. And once again, refuting all those trademark stupidities vomited by Western news agencies. Well, I'm sure everybody, you guys, you all know I am a newspaperman.

I started my career in a big national newspaper, so we know everything we need to know about how news agencies work and how we avoid them like a plague. So, the usual suspects, Reuters, AP, whatever, are saying, ah, they're Houthis. They cannot even name them properly. It's Ansarallah or Yemeni Armed Forces. Houthi is a family. Anyway, they are waiting for an order from Tehran to cross the Bab al-Mandab. This is not how it works. This is their decision. Abdul Malik al-Houthi on top as the leader, the political council, 11 members. I had the privilege to meet at least five of them in Sana'a and Saada last year. And then there's the parliament, their majlis. Everything is debated between the leader, the political council, and the majlis.

And when it's approved, then it's a final decision, which was exactly the procedure before they arrived at this decision to block the Red Sea and the Bab al-Mandab to Saudi Arabia exclusively, not everybody. Well, Israel for obvious reasons, but in this case, Saudi Arabia. So this is the Yemeni dossier as we speak. It can get much, much worse depending on the Saudi response. For the moment, the Saudis are standing down. Apparently, the Pakistanis, you know, they read their own riot act to the Saudis. They said, look, it's not because we have a military pact, which was upgraded, by the way, a few weeks ago, that we're going to be suicidal and support you in this absolutely stupid move. So nothing is going to happen on this front. So this is it, Danny. Let's see a summary of where the Yemen situation is at the moment.

#Danny

Yeah, well, it's certainly a big development in the broader, you know, this broader context of the war, which, you know, I wanted to pull up the report by Israel's Channel 12. It's also our friend at Unit 8200, Mossad.

#Pepe Escobar

The massive attack.

#Danny

Barak Ravid has also reported on this, that Trump is considering a massive attack larger than anything carried out before in the coming days, which you just mentioned. Yemen appeared to be very aware that that was going to happen literally at the time you just said. Yemen already knew. So that's coming. It seems like B-2 bombers, B-1 bombers, they are amassing in the region, likely to start targeting areas like Pektus Mountain. But Iran, Pepe, does not seem to be very intimidated. I want to pull up this. This was Mohammad Ghalibaf, envoy to China, top negotiator, Speaker of the Parliament.

He put out this meme: "They wanted to punish Iran, punish themselves with triple-digit oil instead. Ten out of ten strategy." And here's the meme. There you see it: "World U.S. economy: Let's blockade Iran. Easy peasy." And then, "\$150 barrels of oil, global recession, \$7 gas per gallon," on and on. Iran did it. Just maybe you could talk about what you've been covering now with how Iran has been striking back, and the fact that Iran, no matter how much the Trump administration threatens, even if it carries out this threat bombing Pektus Mountain, it doesn't seem like Iran is anywhere to the point where it'll back down. It seems quite the opposite.

#Pepe Escobar

On the contrary, Danny. Wow. And this is something that became quite clear earlier this week via the Iranian delegation meeting with literally everyone in positions of power in Islamabad. Larry and I, on our new channel, Transition Protocol, covered that in detail three days in a row. It's useful to do a recap to you and to our audience, because the Iranian message, which was delivered, by the way, in person by the Iranian interior minister to the Pakistanis—to everybody, to the prime minister, to his counterpart, to Field Marshal Asim Munir, everybody—theoretically, even if the Pakistanis, as mediators, arrived at something like, okay, let's establish, try to establish a pause, and the Americans would agree, the Iranians said, we would also agree, because they never discard diplomacy.

And this is something that Araghchi has been saying throughout this week: we always consider diplomacy as long as it's real diplomacy. But for us to agree to something like that, the Americans will have to come back to the table and start implementing the MOU as they signed, and as our president signed, from minute one. So this was delivered by the Iranian delegation to the Pakistanis. So the Pakistanis delivered this information to the White House. And guess what happened afterwards? Trump vetoed it, even opposed it. He said it's illogical, absurd, and all that. And then he came back to, "I'm going to bomb Iran to smithereens," all over again. So this once again proves to the Iranians that it's okay, anything is possible with this narcissistic megalomaniac. In fact, he's not making any decisions.

They're making decisions for him. He's just a messenger. Anyway, so there's no possibility of diplomacy. And they are ready. So everything that Ghalibaf says, for instance, is, "We are open to diplomacy, but we have our finger on the trigger." And now it's not going to be—it's already not two to one. Now it's three to one, or four to one, or five to one, systematically destroying all these bases that they are bombing day after day. Once again, very important, there are around 20 bases around the Persian Gulf, and also including Jordan, Erbil, et cetera. Apparently, only four are not destroyed, completely damaged, or partially damaged. Only four. The other 16 are in an absolutely horrible condition. Everything totally destroyed, or almost totally destroyed. And they continue to bomb them day after day, and that's it.

This is not... They are not... Not only are they not going to relent, but once again... There are some leaks, but not so, because they leaked that before. Look, we haven't even started in terms of our

most modern equipment. We're going to start using it soon. And, of course, they are leaving that for the next stage of the war because they know the next stage is going to be probably more devastating than the previous one. So, there is a consensus from the political factor to the military factor, from Leader Mojtaba Khamenei to the National Security Council to all the provincial leadership. You name it, everything: clerical, religious, diplomatic, political, economic, and military. We are ready because this might be the final battle before we expel them for good.

So this is the mentality. And obviously nobody in the Trump administration is capable intellectually to understand that, or even from a basic geopolitical point of view to understand what that means, and why there's absolutely no way they can do anything. They can throw zillions of tactical nuclear weapons against Iran. It's not going to break them. And they're ready to fight to the last Iranian, literally, literally. This means 90 million people in arms, if that's the case. So in terms of national cohesion, this is already an expression of what happened during that week, where we had millions of people in the streets of Tehran, Qom, Mashhad, but also in Najaf and Karbala in Iraq. Everybody united. And the motto—what was the motto in the streets?

Revenge. Somebody has to pay, and they know exactly who has to pay. How they're going to pay is another matter. And Iran has the means to deliver the how, the way they want it, on top of it, because they control the clock. And they know at the same time that the clock is running out for the Trump administration. Everybody in the position of power in Iran knows about the Strategic Petroleum Reserve. Everybody knows. And they make their calculations accordingly. They are patient. They cultivate the mediators, the Pakistanis, eventually the Omanis or the Qataris. They listen to if there's something coming out of Turkey, for instance. They listen to it, although it's usually bullshit. But they don't discard diplomacy at all.

And at the same time, they are looking at the clock, looking at what might happen, for instance, between today and Saturday early in the morning, if there is an attack, and looking at the longer clock until mid-August or end of August. It's going to be much worse. Is there a way out for all of the above? Yes, only one. No other. The off-ramp inbuilt in the Memorandum of Understanding. And the Iranians have made this very, very clear, not only to the Pakistani mediators, but so the Pakistani mediators can talk to Trump and tell him. And even worse than that, and this was revealed by the Pakistani mediators again, Trump has been pestering Field Marshal Asim Munir throughout last week with daily phone calls: "Please find a way to bring the Iranians back to the table in a manner that would not be humiliating for me."

And these are the guys who are on the table. This is privileged information because it contradicts everything that's being vociferated on Truth Social about: "Ah, the mullahs want to make a deal." Bullshit. It's the absolute opposite. Because as dumb as he may be, he's looking at the clock. And every day, the clock is like a Medusa, you know, opening her mouth and engulfing him. You cannot fight against this clock. This is the clock of reality, the oil reality, the oil reality for the American economy, for the global economy, etcetera. So we have these diversionist tactics, like, "We're going to blow up the Pickaxe Mountain," or whatever, you know, bullshit. Or, "We're going to take over

Clark Island," or, "We're going to take over Cashmere Island," whatever. Everybody knows this is bullshit. Even if you could take it, you cannot hold it.

#Danny

You'd probably be worse off trying to hold it. You know, it's like, "Come on, hit me." It's like, I don't get it. It's like, "Just hit me."

#Pepe Escobar

That's what the Iranians are saying: "Hit me. We're waiting for you."

#Danny

Yeah, what did they say? "Come closer" was the motto, I think, early in the war, right? Exactly.

#Pepe Escobar

Come closer. We're here. We are all over here. And we have our missiles and drones pointing at you. At the moment, of course, the bigger picture, which is my favorite subject, which is the larger picture across Eurasia, it's the other two big players, Russia and China, are paying extremely close attention to what's going on in Iran. Not only are they learning in military terms, exchanging information, supplying information, helping logistically, helping with intelligence, etcetera, but they know that what Iran will be able to pull off in the next few days, weeks, and months will condition everything in terms of the larger American war against the Eurasian big powers.

We're not there yet, because Iran is a middle power which is aspiring to become a big power regionally, for sure, but one of the big powers across Eurasia, no question. In terms of Iranian civilization and Iran as a civilization-state, this is normal for them in history. They had much more ups than downs, and influence—cultural influence, religious influence, spiritual influence, historical influence. But Russia and China, they know that this war is against them as well. Russia, of course, is already at war against them. And now they are taking off the velvet gloves. So the West has not seen anything yet.

And they saw already in front of them how Iran taking off the velvet gloves absolutely scares the death out of the American Empire. So this is what the Global South is watching. Wow, we have a middle power under sanctions for 47 years taking their gloves off and attacking the Americans even more fiercely than they are being attacked. So it can be done. If you are sovereign, independent, and you have the weapons, it can be done. In the case of Russia, it's even easier because they're sovereign, independent, and they have the best weapons anywhere. They were just trying to reframe themselves because they saw that the Ukrainians are a brotherly people. No, they are. They are a bunch of brainwashed Nazis.

Finally, this arrived at the top in Moscow. Finally. And China, of course, in the background, they are looking everywhere. They are evaluating very carefully that the campaign of demonization of China now is back in full force. So they can expect trouble on every front coming from the Americans, especially a cornered American administration. So this is the bigger picture. And there is, for instance, I think it was Trump that started this. In one of his vociferations, probably advised by one of his advisors, he talked about the Eurasian axis. This was the first time, correct me if I'm wrong, that Trump actually strung out these two words together: Eurasian and axis.

I never saw Trump talk about Eurasia, ever. So now he's talking about Eurasian axis. So probably somebody like Colby had five minutes with him and said, "Look, we are fighting a Eurasian axis." Well, you know, everything that you say about Iran, China, and Russia, this is what they are. And it's worse. North Korea is also part of it. And these four happen to be existential threats to the U.S., according to the national security doctrine, which, by the way, was redacted by Colby. Who else? So I read something about this. Dugin published, in fact, a long interview with Dugin where he talks about Eurasian axis. This is the first serious analysis of what a Eurasian axis might be.

In fact, it will be a military axis. That's his point. And why? If you don't have a Eurasian military axis, the West, especially the West, will continue to dictate the terms on everything. And Eurasia will be only reacting. This is a really, really good point, which merits debate. I plan to write a column about this soon, analyzing the points of view from Iran, from Russia, and from China separately, and then trying to merge them all. And if the political leadership in Iran, Russia, and China is actually discussing something like this, apparently not, as far as we can tell. And if they are, forget about any leaks about it. So this is the big picture, in fact.

Now the empire is terrified that they finally seem to be understanding that this is the war that they started now against three civilization states whose number one drive is to expel the United States from Eurasia. And that process is starting in West Asia. Everybody thought it would be in Russia, Ukraine. No, it's starting once again on the battlefield, but in West Asia. So it's no wonder that they are, you know, like drunken cockroaches. It's no wonder. And what is their plan? Okay, let's bomb them again. Will that solve anything? Of course not. When you are against a determined adversary, which is a civilization state, which knows that this is an existential war, their survival depends on it. Bye-bye. You already lost even before you started.

#Danny

Yeah, yeah. I mean, the evidence is mounting of this, Pepe. I don't know if you've noticed this, but every time the United States—now, Donald Trump himself constantly threatens Iran with more and more severe strikes, consequences. This is nothing new. Yeah. What I've noticed is that those threats are becoming more specific, while what CENTCOM says they're doing to Iran in 12 straight days has only gotten more and more vague.

So CENTCOM has reported every single night on their strikes, and in the beginning they would say how many targets they hit, specific numbers-wise. They would say 80, 90, 50, 40. Now, nothing like this. Now it's almost copy and paste: "We struck these," right? Always the same thing: maritime capabilities, missile, drone surveillance, air defense assets, over and over and over again, degrading Iran's ability to attack commercial vessels. That's like copy and paste, but there's no details anymore. And then I want to play you, Pepe, what Marco Rubio said about this blockade with Ansar Allah, because while Trump said, "We may have to take care of it, we may have to take care of Yemen," supposedly, in his typical nonchalant bluster, here is Marco Rubio's answer. It was a little different in terms of how to address this blockade.

#Pepe Escobar

We're hoping that there will be de-escalation in the Red Sea, and the Houthis now attacked two Saudi ships. What is your reaction to that?

#Marco Rubio

Yeah, look, I hope that they'll stop. They shouldn't really do that. They got suckered into this by the Iranians. You know, the Houthis largely were smart and stayed out of all this throughout the conflict. But they now apparently have gotten themselves suckered into this, going after Saudi Arabia and their ships. And by the way, I was reading reports a few hours ago that there is actually a Saudi fuel ship that's flagged Chinese. It's a Chinese ship. Are they going to blow up the Chinese ship? And this becomes a problem for China. This will become a problem for the whole world. But I hope that will de-escalate because I think the Houthis, frankly, got snookered into this thing by the Iranians. And they were smart to stay out of it, and they should stay out of it. And they should stop. We'll see what happens there. Obviously, it's not a positive development. We'll see what happens.

#Danny

We'll see what happens. You know, interestingly enough, talking about, oh, China might get hurt by this. China's having their oil be sent.

#Pepe Escobar

He doesn't even know that. This does not affect tankers exporting oil to China. On top of it, he's the Secretary of State. Well, he doesn't read shit, and he's horribly misinformed. He cannot point to Sana'a on a map, this little gusano.

#Danny

It's a joke, actually. "I hope they stop. I hope they stop." That's his answer, which is not really the projection of power that one might assume the United States would have.

#Pepe Escobar

I hope this stops. Okay. Why don't you pick up the phone and call Sana'a, idiot? Ask them to stop. By the way, they beat you up badly. They expelled you from the Red Sea. So, you know, treat them as gentlemen. Maybe they will consider you. They're very gracious and polite people.

#Danny

Yeah, so that's what's so interesting about this, Pepe. And I know you wrote in your recent piece—I'll pull it up—on the Pakistan MOU, Iran diplomatic front. And I highlighted this part here where you said, "the consequences of Iran holding total leverage," where you do get into the Bab al-Mandab Strait being blocked, not necessarily closed, which is true now that we know that Saudi oil, particularly and even specifically Saudi oil to the petrodollar kingdom of the United States, or of the West, that's a huge deal. But maybe you could talk about this article and what you talk about when it comes to Iran's total leverage.

Because I've heard so many things from people saying Iran has lost its leverage. I've heard people talking about how there's all these great divides in Iranian leadership. I think they exist. But right now, what we're seeing—and Larry made this point on another program, Larry Johnson—he said, "We're seeing across the board, from Araghchi, Ghalibaf, the IRGC, they all sound the same right now." So I think that's an important development as well. But your thoughts—maybe you can help us understand what you wrote in this article.

#Pepe Escobar

Very important, and something that is very important for our audience. Larry and I, when we receive top explosive information from the Pakistani mediators, he confronts it with his American sources. I confront it with my Iranian sources. Sometimes there are divergences. This is extremely important. We are not taking what we receive from Pakistan at face value. We cannot. And this is one of the reasons why we are involved in this project. We have the chance and the privilege to have access to privileged information, really, on the negotiating table. Everybody has agendas, of course, so we have to sift through the agendas: Pakistani, Omani, Qatari, Saudi, and of course see the information for itself. And of course, if we're not satisfied, there are questions flowing around all the time.

And some of them are absolutely essential. For instance, if they say that something happened in a conversation, which only very few people have access to, this privileged conversation, we have to be sure that this is what really happened. For instance, I'll give an example of a relative misunderstanding. When the Iranian delegation arrived earlier this week in Islamabad, they told the

Pakistanis before that they were bringing a letter from Leader Mustafa Khamenei. When they got there, they said, look, it's not an actual letter. We have a message.

So we had to go back and forth, ask, are you sure there was a letter? Because in the beginning, we also thought there was a letter. No, it was a message. Who wrote this message? Then there are several possibilities. Could have been Mustafa himself. Could have been his very tight inner circle. Could have been the Supreme National Security Council, a collective decision. Could have been Ghalibaf or Araghchi, you name it. But the most important point is that this message arrived at the Pakistanis and was debated with their prime minister and with Asim Munir.

And this—the key was the tone of the message. And the message, this was the indirect message to the Americans: if you want anything, or a pause or whatever, okay, but you have to fulfill your commitments to the MOU. Because the Iranians already knew from the beginning that it would be rejected. And it was rejected like clockwork. But the point is, for Larry and I, we have to establish at least the veracity of the information, even if some details are lost in the fog of war, let's put it this way. So, in terms of the relationship between the Pakistanis as mediators and the Iranians, yes, there is trust.

And this delegation that went to Islamabad this week is another extra proof. There is trust. If, for instance, one of my Iranian sources said, "Leader Mojtaba is not talking to anybody in Pakistan." Well, you can interpret this as, obviously, physically he can't. Number two, he's not sending emails back and forth. Number three, if he sends a letter, it's not necessarily a letter that he writes. It could be his inner circle. But they are in contact. Because the Pakistanis, when they ask something very important from Tehran, they want to be absolutely sure that it comes from the top, because then they will be passing this information to the Trump White House.

So they are in a very, very complicated position. Larry and I, we understand that. And another thing that most people, armchair experts, don't understand is, what we are doing has nothing to do with what we feel about the current Pakistani government. It's a completely different story. Larry and I were interested in the intel, and when it's precious, it's really quite something. So if we have a chance to receive that and then, you know, to talk about it on our show or here with you or in other podcasts or writing, great. This does not mean that we are following the agenda of the current system of government in Islamabad. No way. Absolutely not.

#Danny

Yeah, well, I think that's a very important point because oftentimes in developments like this, the mediating position, the mediator position, the position that a country like Pakistan is in, it goes beyond the interests of just individual regimes or political entities like Pakistan. This is a major regional and global development that... Yeah, regardless of whoever is in leadership in Pakistan, they'd probably be working their butts off to try to be involved in the process of easing this thing.

#Pepe Escobar

And they are, Danny. And the people who are actually working at the table, they are very, very serious. And they are working their butts off 24/7. And obviously they are desperate because everything is going downhill because of the actions of the American president. Can you imagine something more stupid and more absurd? This is theater of the absurd. The President of the United States keeps calling Field Marshal Asim Munir and saying, "Look, get me something, get me an off-ramp, anything, as long as the Iranians come back to the table." When there is the possibility of the Iranians coming back to the table, if he fulfills his commitments to the MOU, he rejects it.

#Pepe Escobar

It doesn't make any sense at all, at all.

#Pepe Escobar

Yeah. And I want to explain to our, you know, our enormous global audience, people need to know how these things work in the background. They will learn nothing if they keep reading through social posts. Really, nothing—less than nothing. Yeah.

#Danny

Yep. Nice. I mean, no truer statement ever told, Pepe. Now, here is—I want your reaction to, given all these developments you just outlined here, help understand and explain your reaction to this. You know, Donald Trump, this is a Truth Social post. Donald Trump just agreed with Saudi Arabia around this so-called nuclear enrichment or non-enrichment civil nuclear deal, it's being called, with Saudi Arabia. And he had to explain because there's been a lot of questions about this, especially among the Israelis and even some Western countries, saying that this might be troublesome. But it says, "The civil nuclear deal—there will be no enrichment being made between the U.S. Department of Energy and Saudi Arabia, which pertains only to non-military use, such as the ones that Iran and the UAE already have—will be approved, but is totally subject to Saudi Arabia joining the very successful Abraham Accords."

The United States is not opposed to civil nuclear facilities, non-enriched. Thank you for your attention. This is just so, I mean, the timing of this is so strange, but also maybe it's not. Maybe you can help me understand, help the audience understand what the hell is going on here with Saudi Arabia now engaging in a nuclear deal with the United States, which undermines a lot of Trump's position. And now he's saying he's okay with civil nuclear facilities, but he basically claims that all of Iran's nuclear, you know, facilities are all military nuclear weapons-based, which of

#Pepe Escobar

The IAEA certified that Iran runs a civilian nuclear program. As for this post, Danny, it was obviously written in Tel Aviv. Obviously. When you look at the Abraham Accords, obviously. And then they told Trump, "Yeah, you do this because we want Saudis back to the Abraham Accords," period.

#Pepe Escobar

That's it. That's it.

#Pepe Escobar

Straight up. And the fact that they managed to do this once again proves how they run the game. It's very impressive in itself. They can force the President of the United States to do something like this. Everybody is going to say, "Ah, so now we can enrich uranium as well. Everybody can enrich uranium. Fantastic. What if we do enrich uranium and we lie? And we enrich more than we should?" And why are these rules okay for Saudi Arabia but not okay for Iran, which has a civilian nuclear program? But the key two words in this post are Abraham Accords, which, by the way, were dead until today.

Now they could be resuscitated alongside IMEC, which is also dead. Because obviously, IMEC with Saudi Arabia and the Emirates in the same connectivity corridor or link to Israel, forget it. Iran will never let that happen. So this is where we are. Once again, the war of the connectivity corridors, of course. One that is active, which is the INSTC: Russia, Iran, India. By the way, bombed by the Americans, several nodes, including the port of Chabahar, and one that exists only in the minds of some demented people in Tel Aviv, the IMEC, which even the name is fake. It's not India-Middle East Corridor.

It's Israel-Arab Nations-Europe-India Corridor, in fact, with Israel at the center. Because they still have to build the connections between Israel, the Emirates, and Saudi Arabia for Israel to become a key energy-exporting pole to Europe and to India. This is what the IMEC is about. In the middle of this war, forget it, it's not going to happen. Even after this war, depending where it goes, it won't happen. But, of course, the Israelis have the power to dictate to the President of the United States, look, it's time to resurrect the Abraham Accords, which, by the way, would help to resurrect IMEC. That's where we are.

#Danny

Yeah, well, it almost feels like, you know, while both Israel and the United States pursue a very aligned, quote-unquote, foreign policy or regional policy, the dynamic here, in terms of the optics, does feel like Israel pulling strings. Israel pulling strings to say, hey, could you revise? Could you maybe repackage this product that you just put out there with the Saudi deal? And that then begs the question as to Saudi Arabia. What is Saudi Arabia thinking here? Because there's also this blockade, but then there's also all kinds... I mean, Yanbu was supposed to be the saving grace,

right? It's supposed to help Saudi get as much oil out as it can while the Strait of Hormuz is tied up. Yeah.

And then you have the rest of the Gulf, you know, the UAE talking about building pipelines. There's all this talk about trying to maneuver around the war, but no real talk among a lot of these Gulf countries on what's the only real way to end the war, as they continue to be used as launching pads for the United States. So it's a really—I mean, it's a really dark time, I think, for Saudi Arabia, for the Gulf. Talk about your reactions to this. I don't know where Saudi Arabia goes from here, because it seems like the only path it's willing to walk is creeping more toward full participant in the war again, while the opposite is actually probably what is necessary and what will be the only thing that keeps Saudi Arabia, you know, viable as an entity itself.

#Pepe Escobar

Well, this Gulf petro-monarchy, Danny, and all of you, if you've been there, if you've spent some time over there and you see how they work, everything is fake. I would say that Dubai is the absolutely emblematic illustration of how fake the whole thing is. Fake, dangerous, and, of course, a slave-owner mentality on the part of these oligarchies, these mini-monarchies, or these one-man monarchies, which is the case of the Emirates and, well, in the case of all of them, in fact. Even Qatar. The ones I know very well, because I went there many times, are Qatar and the Emirates. But in all of them, it's the same thing. And in the case of Saudi, it's even worse because everything depends on MBS. So he's trying to, these past few years, sell the image of a modernizer, that among the youth in Saudi Arabia, he's as popular as Bono.

That kind of crap, you know. It doesn't fool anybody. Saudi Arabia, for instance, is over a hundred tribes, conflicting tribes in the history of Arabia, which are only kept together with a very, very iron hand, fist, helmet, you name it. Once this thing starts to disaggregate, expect Saudi Arabia to collapse completely. So we're going to have warring tribes of Arabia all over the map. So these are totally fictitious, fake entities, these monarchies, these one-man monarchies. Qatar is more complicated because the family is more nuanced. Even though, of course, it's the emir, but you have different centers of power in the family, and some of them are complicated. Westernized, of course, but well-educated at least. Some of them appreciate the power of diplomacy.

It's a matter of education, of course. But, for instance, Bahrain—Bahrain is an absolute disaster. You know, that ruling family is, wow, Brontosaurus territory. Kuwait, the same thing. So it's complicated. Once the disaggregation starts all across the GCC, it's going to be a house of cards completely. And the Iranians know it because the Iranians have had relations with these [countries] for decades. And even under sanctions, there are Iranian businessmen all across the GCC. There's a lot of Iranian money in the UAE. I heard figures that are absolutely stratospheric. We don't know who to believe. But if you talk to, for instance, oil traders or commodity traders in Dubai, for instance, they know it very well because they deal, and many of their clients are Iranians.

So there is a lot of Iranian money and influence everywhere in the GCC, especially in the Emirates. So it's just a matter of time. Of course, this will happen always after something drastic happening on the battlefield. And the battlefield will decide. That's when both wars once again merge. The war in Ukraine will be decided on the battlefield. This is something that we started hearing from Lavrov himself only a few months ago. And the Iran-U.S. war will be decided on the battlefield. It's going to be horrifying, but there's no other way. And the Iranians also know it, and they are ready for it. The problem is the Americans are not ready for it.

They are not ready even to admit that they are being basically counterpunched heavily by a mid-ranking power, and there's not much they can do about that. Can you imagine contemplating a strategic defeat? So this is what, you know, the people who run the show in the U.S., the real elites in the U.S., they cannot sleep because of that. Because the Eurasian axis, in practice, even if it's not an axis, they are moving all the time, and the U.S. loses terrain day by day, everywhere that matters across the region. Japan, Japan doesn't matter. Japan is a colony. Japan is going to change anything geopolitically in the region? No. So it's not important. Iran is. Iran is a crossroads. It's a completely different story.

#Danny

Yeah, yeah. In the last five minutes, Pepe, I just want to, you know, I just want to put out there that Iran, while certainly I think people overblow—I think there's been a lot of people who have overblown the concessions aspect on the Iranian side with the MOU—especially given the fact that a lot of the terms were Iranian terms that were really just a springboard for real talks. The fact of the matter is that the MOU wasn't out for the United States, and I just don't—I don't see how the U.S., given how the U.S. generally needs to appear, you know, exceptional, it needs to appear the strongest, most powerful, it needs to appear tough—the MOU is still there to walk back to, but to see the Trump administration, or really any administration, after making these moves, walk back to it saying, "Okay, we'll talk again about these same terms," it doesn't seem plausible, which then begs the question of, well, then what? Because escalation has its limits as well. It's a true quandary in all the best senses of the word. So your final thoughts on this?

#Pepe Escobar

Well, because there was never any strategy, Danny. It's something we knew even before February 28th, and especially after the first few days after February 28th, there was never any strategy. So now they're desperate. You cannot launch a war against a sovereign, independent state in West Asia without an extremely detailed strategy. So now they're paying the price. They started to pay the price from the beginning, in fact. But now it's very, very serious because now it involves everything. It involves not only a deep, deep crisis inside the U.S., a crisis in the oil market, a crisis in the bond market, and a global crisis just around the corner, which can become much more horrible than anybody is imagining.

Is this how empires end? Yeah, this is one of the ways, exactly. Overreaching, hubris, a mix of ignorance and arrogance, overexpansion, and especially how this hubris translates into their everyday modus operandi. And when you think that the free lunch is going to be literally forever. Well, in ancient Greece, the Greek gods used to punish this really, really hard. We don't have them anymore with us. But I would say the angel of history, you know, to remind us of Paul Klee, Walter Benjamin, those wonderful minds of the 20th century, the angel of history is looking and saying, "No, these guys won't get away with it."

#Danny

Yeah, you will, Pepe. It's always a pleasure. This was a great show. I want to make sure everybody knows that your Telegram, your X, The Cradle Protocol on YouTube, which you co-organize and host, that's all in the video description so people can check out all of your work, as well as your political and strategic culture on a lot of the themes and developments that we spoke of here today. Also, hit the like button, everybody. That helps boost the show so more people can see this conversation with Pepe. All the places to support this channel are there in the video description as well, after you check out Pepe's work. Tomorrow, I'll be on with our mutual friend, Mohamed Rondi, 1 p.m. Eastern Time, of course, the 24th of July. Pepe, anything you want to say to the audience before I hit end?

#Pepe Escobar

No, it's okay. Thanks, everybody. Take a look at our channel, The Cradle Protocol. We are a baby channel, but we're growing relatively fast for a young channel. And pay attention to the quality of the information, even if you disagree with it, and even if you disagree with the analysis, whatever. But pay attention to the quality of the information, because this information will circulate a lot, and we'll be talking about it here, in this show as well. Thank you. Thanks very much.

#Danny

Definitely. All right, everybody. See you tomorrow, same time, 1 p.m. Eastern. Take care.