

No Strikes on Iran, Gulf States Intervene, Trump Claims Deal Near.

Trump called off the largest strick on Iran since the beginning of the war that he had been hyping up himself. In a Truth Social tweet, he said that a deal was near. Well, let's review what this actually means and why he was forced to TACO once again. Support us: <https://pascallottaz.substack.com> <https://neutralitystudies-shop.fourthwall.com> Important Sources: Aljazeera Desalination Article: <https://www.aljazeera.com/news/2026/3/12/how-much-of-the-gulfs-water-comes-from-desalination-plants> Trump Tweet: <https://truthsocial.com/@realDonaldTrump/posts/117023461141824050> Time Stamps 00:00 TACO Sunday: The Iran Strike That Didn't Happen 05:52 Trump's Post: Threats, Reversal, and a Claimed Deal 10:37 Iran's Leverage over Gulf Infrastructure 17:50 Iran's Conventional Second-Strike Strategy 34:50 Is the Danger Over? Strategic Outlook

#Pascal

So it seems to be Tactical Sunday, everybody. Welcome back to another show. This time, just an update on what is actually happening in Iran. And the big news right now that we are seeing is that the strike that was announced and that was actually talked about quite a bit in the last couple of days, renewed massive strikes on Iran's infrastructure, is actually not happening, or let me put it this way, hasn't happened over the weekend the way that a lot of people predicted it from the movements that we saw on the ground and the preparations that were going on in the Gulf states. So just very quickly, what was being prepared?

We've read all of these articles here over the last couple of days in the international news, and Donald Trump threatened very large attacks, some of the largest yet in the entire war against Iran, and this time against Iran's civilian infrastructure, the energy infrastructure, the power plants mainly. So this is from CBS from a couple of days— from yesterday, actually, from August 1st: U.S. and Israel preparing to bomb energy-related targets in Iran. And this was actually what the U.S. president was threatening very much. And it is what the Iranians then said will lead them to actually retaliate very much. And also this was reported in Western media: Iran threatens to cripple Gulf water energy systems after Trump ultimatum.

And just also again for context, Trump continuously combines his threats against the civilian infrastructure with the demand that Iran finally bend to his will and will open the Strait of Hormuz, by which he actually means hand over control of the Strait of Hormuz to the United States and, you know, surrender also in all other ways. But as we have spoken about on this channel many, many times before, the Iranians just say, like, no, that's not what we're going to do. We're going to keep firing at you. Every time you shoot at us, we're going to shoot back at something within reach, and especially things that are necessary for the Gulf states to survive, since they are enabling you.

The United States' attacks on Iran wouldn't be possible if it wasn't for the Gulf states enabling the United States to actually fly attacks from their territories, or use their airspace, or use their port facilities to dock and whatnot. So Iran has been saying constantly and consistently that it will strike an eye for an eye, and it will destroy the civilian infrastructure in the Gulf states should the United States actually do this. And that this was a very serious situation, and that the United States was actually seriously contemplating these massive strikes on Iran, which then would have led to counterstrikes, that this was actually in the making, also transpires from what the U.S. embassies in the region sent out.

This one here is also from August 1st, that is Saturday, yesterday, 2026, that the U.S. embassy in Jerusalem sent out a security alert. The embassy says that due to heightened tensions in the Middle East, the security environment remains complex and the potential for unforeseen escalation. Potential unforeseen escalation means, of course, planned escalation, planned attacks against Iran. And, well, I mean, we don't need to discuss the wording. This is obviously a diplomatic institution of the United States, so it would phrase its things in these ways. But the fact that they were warning Americans in the region that they need to be prepared for air travel to be again interrupted and that they might have to flee from the places where they are at the moment, that was very ominous.

So I do not think that these threats came out of nowhere. I mean, the strikes on Iran were being prepared. The entire machinery that is needed in order to launch strikes, and refueling airplanes and so on, were being readied, and they were there. They are still there in the region. And the fact that so much equipment was pulled together was what led everybody to speculate that it would happen this weekend. If you ask why on the weekend, Pascal, then, well, the answer is that Donald Trump always tries to do this kind of stuff with minimal impact on the markets. Or, like, no, let me rephrase this.

He tries to do this in a way in which he and his cronies, of course, benefit from the market movements as kind of a side effect of these kinds of attacks. So attacking on a weekend has the benefit that the markets in the United States and Asia are closed, right? The stock markets. So they cannot react immediately in a very volatile manner. So this has been a consistent pattern throughout the last couple of months, actually, that strikes always came either on a Friday night after markets have closed or on a Saturday morning. And that then the idea of the administration always is that the biggest kind of shock then is already over by Monday morning and the stock markets wouldn't react that volatile. So now this time, again, we were expecting this to happen on the weekend.

And let me just show you, because this is actually what Donald Trump then put out. Let me try to get this a little bit more in focus here. Well, here, this is the Truth tweet, the Truth tweet that Trump sent out. And it reads as follows: "The USA is locked and loaded and ready to go against the Islamic Republic of Iran at levels of military terror, strength, and power not seen since World War Two." I find it quite fascinating that he actually uses the word "military terror." He actually, in this Truth, admits that he is about to terrorize the Iranians. And, you know, terror is usually not something that

militaries are supposed to spread. They are actually even illegal under international law, right? They are supposed to focus on military installations only.

Terror attacks are, of course, those against civilian infrastructure. And that he admits that he basically locked and loaded the U.S. and made them ready to strike, to do terrorist strikes, is just a new level of stupidity or insanity. Because if he thinks that this language would actually threaten the Iranians, then he must have not paid much attention to how the Iranians actually work. But let's continue this. And again, this is a tweet from last night, actually, that he sent off in the United States late on Saturday evening. So let's continue. Despite this, we have just been asked by Iran and other Middle Eastern countries to hold off any attack, in that the parameters of a deal have been agreed to.

This would include the immediate, complete, and total opening of the Strait of Hormuz and an end to Iran's nuclear threat. Based on this request, I have agreed, for the future benefit of the world and likewise the survival of a successful and prosperous Iran, to cancel the attack, subject to being able to rapidly make a deal. The country of Israel joins me in this commitment. Get to work, everybody, and get it done." Thank you for your attention to this matter, President Donald J. Trump. So Trump is actually informing the world again from his smartphone or desktop computer on Truth Social that he apparently was asked by the Iranians to please not strike them.

Unsurprisingly, the Iranians are saying, like, that's not what we did. It's actually the U.S. side that was begging us for a diplomatic agreement through diplomatic channels, for some form of understanding. They are actually saying that Al Jazeera is reporting about this, that it was the Iranians— that it is the Americans who are asking for some form of kind of understanding. Here in Al Jazeera, one of the news: Iranian lawmakers accuse U.S. of threatening attacks in public while pushing for talks behind the scenes. Which one is true? We don't know. How would I know?

But judging from what I know about Iran and also from the discussions with Professor Mohammad Marandi, I think that this one here, the Iranian position, is actually quite likely to be closer to the truth than what Donald Trump just said. The Iranians, they keep firm and steady in their approach because they have figured out a military tactic to actually confront the United States with all of its warmongering. And the tactic is built on several layers, or several pillars. And one of them is an eye for an eye, and the other one is: do not give in diplomatically to what you can achieve militarily. And they figured out militarily how to disarm the United States. And so it would be folly to actually go back on that.

For every strike the U.S. does, there will be a counter-strike, and it will hurt the United States more than it actually hurts Iran. That's the strategy they are implementing, until the United States actually gets conditioned like a dog, like Pavlov's dog, that if it strikes first, it's going to hurt more downstream. So this time, actually, because the U.S. so openly and blatantly threatened the civilian infrastructure. And again, the Truth Post just puts another indicator for that, that the U.S. was seriously considering blowing up necessary civilian infrastructure in Iran and has been threatening that all the way along, like threatening a war crime just many, many times, time and time again.

The Iranians, of course, then threatened similar war crimes in the Gulf states. And let me just show you this, because it is: if the United States actually starts blowing up Iranian infrastructure, facilities to produce electricity, the Iranians said, "We will blow up the same thing over there." And that would be absolutely catastrophic. There is actually a quite good article also in Al Jazeera from a couple of months ago on just how dependent the Gulf states are on desalination plants. And you must understand, Iran doesn't only have the ability to strike the desalination plants directly. Desalination plants also need a lot of energy.

They need a lot of electricity to run. They are quite energy-intensive to run. And the Middle East, West Asia, is just very dependent upon those. The Gulf states couldn't run without desalination because, as this article here beautifully shows, the Gulf has no permanent rivers. Saudi Arabia, Bahrain, Qatar, the UAE, Kuwait—they have no permanent sources of sweet water, of drinking water. They have some waterways, seasonal waterways, that show up when rain actually does fall. But other than that, they are just dependent upon either imports or creating, using desalination, so taking the salt out of seawater and making it drinkable.

This also includes, of course, Oman. And here, let me just show you how dependent they are on this. There's a beautiful little graphic here. Qatar gets 61% of its drinking water from desalination. Bahrain gets 59% from desalination. Kuwait, 47%. They do have some groundwater that they can use. But look, if you're looking at losing half of your drinking water that you need for your population to physically survive, then anything that threatens the process of getting the drinking water is a life-threatening or a survival-of-the-nation-threatening kind of scenario. And Iran, again, doesn't need to strike at the desalination plants directly. If it strikes the energy facilities that are needed in order to run these facilities, then again, it is game over.

And that's precisely what the Iranians were threatening. That includes a lot of tweets by the leadership. That includes also Mohammad Marandi, who I follow closely, tweeted about this several times. If the U.S. strikes, then Iran will hit back at the Gulf states. So, in line with actually the strategy that they've been following ever since February, Iran strikes at the military facilities of the United States directly, but it also strikes at the enabling states that make this happen in the first place. And then, unsurprisingly, we also get—not a lot, but in a couple of the news media—we get these indications that behind the scenes, what we don't really see very much is the activities of the Gulf states, of these countries, of the GCC members, to try to somehow dissuade the United States from continuing this.

Here's an article in AP with the title, "Trump says Mideast allies have reached outlines of a deal to end Iran war, says U.S. to stop new strikes." And in this article, the article actually described how there was, again, a phone call between Donald Trump and the leader of Saudi Arabia, Crown Prince Mohammed bin Salman. And we don't exactly know what was discussed, but bin Salman was the one who, six weeks ago, seven weeks ago, while the first wave of strikes was still ongoing, actually had a very angry phone call with Donald Trump and said, like, "You cannot use Saudi airspace

anymore to attack Iran because they continuously strike back at us." And of course, in the latest round of attacks.

Iran again struck back at Saudi Arabia and destroyed even more of the energy facilities, including some pipelines that were struck and some refineries that Iran struck in Saudi Arabia to punish it for the continued support of the U.S. Saudi Arabia then also started, in a completely unnecessary escalation, more war with Yemen, with Ansar Allah, and causing them to enter the fray. And over the last week, the last two weeks actually, we saw how the war is now vertically spreading, because now also targets in Jordan and in Iraq and in the wider region, Gulf area, are being struck and are being, like, sucked into this conflict. So on this weekend, now we were at the point when Trump actually had to make this decision whether he would go through and strike again.

Iran the way he had threatened, or if he, on the contrary, would back down. And it seems to me that back down it was—backing down he was. And I don't want to be—I don't want to berate him for that. It's a good thing that he is not striking Iran. Of course, the acronym TACO, Trump Always Chickens Out, comes to mind. Of course, that's what I introduced this segment with. But at the end of the day, it's a good thing if escalation doesn't happen, so I'm not against it. It's just, what do we make out of this? And don't get me wrong, they might just attack tonight. They might break with their pattern and strike in the early morning hours of a Monday morning. That is absolutely possible because we've seen how the United States has been using, and Trump has been using, diplomacy, but also messaging in the international media as a way to kind of lull the adversary.

And it is absolutely possible that this is all kind of just an elaborate strategy stunt in order to make the Iranians believe that everything is fine, and then they let down their guards, and in the early morning hours of Monday morning, he goes and strikes them very hard, and he blows up a lot of the power plants, and then also tries to take out all of the missile launchers and whatnot. But this would be utterly ridiculous again because the one thing that Iran has proven so far, of all the things it has proven, is that it is able to strike back and that the United States cannot, cannot take out its infrastructure. That's just what is pretty clear by now. Let me just go through this again, right? These layers that Iran built, not just of defense, but also of counter-strike capabilities.

I've discussed them before, but it is important to keep them in mind because this is, in my view, also what the U.S. military establishment must have understood by now. On the one hand, Iran is not able to shoot down U.S. incoming drones and missiles. The drones and missiles will hit Iran. So even bombers can partially fly over Iran, although it's very dangerous. Iran has managed to shoot down several of those. Iran claims just recently that it shot down an F-35, and that is probably true. However, it is also true that Iran can be hit. So the entire strategy of Iran is actually not built around perfect defense.

It's not built around the idea of an Iron Dome, like Israel or the United States are kind of portraying their approach, right? Nobody can hit us. We have a perfect defense system, which is all bogus anyhow. I mean, it's never worked, and Israel was hit very heavily by Iran. But the idea, the concept

is, we shoot down anything that comes in. Iran isn't doing that. It knows it is vulnerable. It knows it can be hit. But what they developed is something that we weren't aware, in the international commentariat, that it even was possible. It is a conventional second-strike capability. We used to talk about second-strike capability only in the nuclear realm, right?

And the idea there is that if one country, if one nuclear power attacks another nuclear power, then the other nuclear power needs to have second-strike capability to fire back and make sure that if the first one shoots and you die, that then at least you can also deliver death to the other one, and so both would die, which then, in theory, of course, creates an equilibrium, right? It creates the MAD situation, M-A-D, Mutually Assured Destruction. And because both sides know that if they shoot first, they will die too, then both of them will not shoot. That's the whole idea of, well, Mutually Assured Destruction and the nuclear kind of equilibrium, this equilibrium of threat and Armageddon, basically.

But what we never thought about is, what happens if states manage to do that in the conventional realm? And Iran built, for the last 25 years, 30 years, since the end of the Iraq War, it built its entire strategy to confront the United States around conventional second-strike capabilities. So first and foremost, it put all of its important military infrastructure very, very deep underneath its granite mountains and very, very deep underground. So those, the most critical facilities, especially the weapons manufacturing facilities, the missile facilities, silos and so on—not just the silos, but the missile manufacturing plants—are all underground and they cannot be hit.

These mountains are so deep, they're so strong, they're so resilient and resistant that even if you drop a nuclear bomb on them, the impact of the bomb will go up; it wouldn't go down, it wouldn't be able to reach these facilities. So what the Iranians made clear is that, yes, you can hit us, but you cannot destroy these things. And even if you do hit us, we will hit you back, and we will maintain that ability. We will maintain the conventional second-strike capabilities so we can destroy your stuff. And by the way, we also know where your stuff is, because actually your stuff is not underground, because the United States, again, built its defensive strategy around the idea of shooting down what comes in.

If you shoot down anything, again, if you have an Iron Dome, and if you put that Iron Dome—the idea of the Iron Dome—you put that over Kuwait, Qatar, Bahrain, then you're invincible, right? Well, turns out it's a stupid idea. It doesn't work. And the Iranians called that bluff 20 years ago, 25 years ago, when they started with their strategy of putting everything underground, right, and started their strategy with knowing that, okay, we will be struck, fine, but we will strike back because that Iron Dome stupidity, we can get around that. They cannot actually defend completely against everything we have, and turns out their bargain is working.

And this is why the United States is currently in such a problem, because you cannot change that kind of strategy soon, right? Because it demands massive infrastructure investment. All of the United States' equipment is basically exposed to Iran's strike capabilities because it's not underground, it's not dug in, it's not in a bunker. Even the military bases of the United States—it turns out that a lot of

them don't even have proper bunkers, and the military personnel is so exposed to these Iranian strikes because they don't have places to go and hide for when things come in. Because again, the strategy was like, "Oh, we can shoot it down." And they can't. They can't. They can't shoot it down.

They can shoot down some of the things, but they can't shoot everything. So all Iran needs to do is to overwhelm these missile defense systems, the THAAD systems and the HIMARS and whatnot, the Patriots and whatnot. And they can overwhelm them. They can overwhelm them with much cheaper equipment than what these things cost. And that's what Iran has been doing. Iran has been depleting the U.S. stockpile of weapons, of missiles, of defensive missiles and offensive missiles, because the other part of the strategy is, again, absorb. Iran has to be able to absorb, and Iran is able to absorb on two levels. Militarily, it has built its infrastructure all over its country, so it's actually hard to hit all of them.

They are not together. They're dispersed over the entire stretch of the country. And secondly, the command structures are also highly resilient. That's why, when the United States resorted to decapitation strikes and had the idea, "Ha, we just cut off the head of the snake and then the whole thing dies." Well, guess what? The Iranians prepared for that. Why did they prepare for it? Because they saw that this is the kind of tactic and strategy that the U.S. is using and tried to do in other places with Hezbollah, with Hamas, and so on, and how it goes about things. The U.S. itself and its command structure is a pyramid, right?

Everything depends on the commander-in-chief, Donald Trump, the president, and it goes down from there. And in their conception, they thought everybody must be organized like that, again, because the West is so absorbed, so self-absorbed with the way that they do things, and they think of their own ways so highly that they think everybody else must be thinking in the same way. Turns out the Iranians didn't. The Iranians actually structured their military apparatus around the idea of expendability. Everybody is replaceable. Every position has sub-positions which are filled with capable people who, if the head is killed, can step in and take over the ship from exactly where it was.

And that's true for the military arm, including the IRGC, and it is true for the political arm, the leadership like Ayatollah Ali Khamenei. Once he was killed, it was his son who just came in. Once the other leaders were killed, including people like Ali Larijani and so on in the Security Council, they just had the next person step in and come one after another. They just filled the positions again, and the system continued. I wrote about that in an essay and said, like, how do you kill an enemy who, when you strike, when you cut off a head, just a new one keeps growing after it? And then, well, you cannot use decapitation strikes to kill that kind of animal. So, and that's the animal that Iran made itself into.

And then, last but not least, the pyramid structure is not true. Iran built a network structure. It created 31 military governorates, or however you want to call that, military centers, command centers, that have command over their region. And then these military commanders can issue strike

orders and so on on their own. They are not dependent upon a phone call from Tehran. And they are able now to coordinate these things, not because, again, of a phone call from Tehran, but because they have an integrated and well-communicated strategy. The strategy book has been sent out, right, a long time ago. How do we react? If we are struck like this, then how should each commander react in turn?

And then based upon the strategic thinking, these commanders then choose and pick their own targets, which is actually the explanation why Iran also hit a couple of ports in Oman. Because Oman and Iran actually have, on a political level, a quite close relationship. I talked about that in a recent video as well. They have a good relationship with each other, a relatively good relationship. And Oman remained as neutral as it gets in that entire region. Oman, even on its own homepage on Twitter, under foreign relations, says that it tries to maintain a good relationship with everybody, and including Iran, it wants to maintain a close friendship, and the security of Iran is very important to Oman.

They divide all of these things, and the delegations, Omani delegations, keep going and meeting the Iranians, and the Iranians also keep going to Oman. Araghchi, the Iranian foreign minister, has visited Oman at least once, if not twice, since February 2026. And they are working on a joint understanding of how to manage the Strait of Hormuz and whatnot. They keep doing that. At the same time, in February and then March, March this year, when the missile attacks started happening, the U.S. started firing at Iran. They also fired back a couple of times at Omani ports.

The reason for that, as Araghchi told us, is that it's not in his hands anymore. Once the military takes over, or once these attacks start, their military apparatus kicks into gear and they autonomously choose and pick what they target. They choose and pick based upon, again, the overall strategy and the tactical understandings that they have. And it is not the central government. It's not Araghchi or the Minister of Defense and the others that then say, like, where and what to bomb. It is the military commands, which is actually why in Iran, it is quite important that the political leadership also communicates in advance what the overall strategy should be.

These kinds of threats, you know, that if you attack our power plants, then we're going to attack yours, are not just a threat to the United States. It's actually also an instruction to the 31 military governorates to tell them, look, this is, by the way, how we should think about this. Not that you don't know, guys, but just let's repeat this. Like, we are now, as a nation, kind of taking the decision that if they strike us here, then we strike them back and we bring hell to the Gulf states. So that's also part of the internal communication, which is also why it is important to see whether the different military leaderships in Iran are also talking in similar terms.

But it seems to me, at least for now, that Iran, despite being very horizontally organized with its military defense strategy, overall, ideologically, they are very much on the same page. Hence, they also understand what must be struck and what not, or what kind of level of escalation needs to be sought, because that's the other thing. Since it's an eye-for-an-eye strategy, the Iranians actually

must be careful not to overreach on the other side, because what you want to inflict is proportional damage, again, in order to do the whole conditioning. And we've seen that. Of course, Iran tries to strike where it actually hurts the U.S., including the entire country.

What is it called? The surveillance apparatus. So they struck all of the radars. The radar systems in the region were some of the first targets that they took out. And those hurt the United States a lot because it basically makes them blind and it reduces the early warning on these military bases very, very much. So, this is again, this is where we are. The Iranians have a very clear strategy, and they keep following that strategy. And that is why I do not think that this claim of Donald Trump, that the Iranians are basically begging him to come to the table, this is bogus. The Iranians, again, they stick to their guns.

They stick to their strategy, which is just like, let the other one figure it out themselves, what hurts them and what not, and just make it clear that they will stand and withstand any kind of attack, and that they will maintain the second-strike capability. And then it is everybody else who's going to suffer. And they, of course, Donald Trump threatening attacks and saying, like, if you don't do as we want, then we're going to hurt you very bad, gives them the ability to say, like, well, then we're going to strike your friends. And that actually gives the friends, the Gulf states, the time to panic and try to do whatever they can to kind of wind that down. And while Mohamed Marandi and so on keeps talking about the Gulf states as these Gulf countries, monarchies and dictatorships and whatnot, and that they are complicit and so on.

I do have quite a bit of understanding for their position because, you know, again, these kind of things, these strategies have been built. They take decades to build. Again, Iran's strategy took decades to build and to get it to the point where it is now. So does this whole Iron Dome thing and the whole security strategy also of the Gulf states, of basically throwing themselves in the arms of the Americans and basically saying, like, fine, we are your protectorate and we will serve you, but in return we get security and money, right? And once that is built and it is in place, it is really, really difficult to unwind. It will take years to unwind this, but the Iranians are now trying to accelerate the pace at which the Gulf states have to learn that they need to reverse their security strategy and that they actually should throw out the United States and that these U.S. military bases are a huge liability on them.

Here you see how this entire coast is just, like, well within the reach of Iran and can be struck. And you see how dependent also these states are on imports—interestingly, sorry, not imports, on desalination. Interestingly, Saudi Arabia is the least dependent on desalination. Only 18% of its drinking water is desalinated. But nevertheless, the others, everybody is quite vulnerable to this kind of threat. And we haven't even covered Israel yet, which is even more dependent on, to my knowledge, even 70% to 80% dependent on desalination. Although the Iranians right now, after my last discussion with Mohammad Marandi, seem to exclude Israel at the moment from any kind of targeting because they do not want to disturb the political problems that Netanyahu is in.

They, according to Marandi, are evaluating that the current internal problems of Israel are working in favor of Iran and are working toward the destabilization of Israel. And hence, if they attacked Israel right now, all it would produce is a rally-around-the-flag kind of situation, kind of reaction. And the Iranians don't want that. They'd rather let the problems simmer on their own. Hence, currently no attacks and no threats against Israel, unless Israel starts attacking Iran, in which case, again, the reciprocity strategy will kick in. Yes, so this is where we are at the moment. I think the danger is not over, not at all. I mean, again, we might see the United States just basically having delayed everything by one or two days.

Maybe it's all just a trick and they're going to continue with the bombing. But maybe, maybe it is a moment when the Trump administration, not just Trump himself but the White House, decided that this is not worth it, that actually threatening all of the infrastructure in the Gulf is one step too far. Not that they don't want to strike Iran, not that they wouldn't love to just try to bomb and kill a couple of thousand people more in Iran, but that the costs are assumed too high. Because again, if Iran takes out the desalination plants, you would have to evacuate massive numbers of people from the Gulf states. You would just not have enough drinking water. So you would have to fly people out. You would have to fly water in.

It would bind massive capabilities, and that might just be too big a disaster to actually do, because if these places are not habitable anymore, I mean, even if you manage to somehow keep supplying a couple of air bases, again, they would be hugely exposed. It would just be a catastrophe. It would be a catastrophe, and there would be no future anyhow. So instead of maneuvering yourself into a completely destroyed Gulf future, switch tactics to something else. And again, we've seen now how the U.S. has been circling, or cycling, through different kinds of military approaches, from regime change, like shock-and-awe-type first decapitation strikes, and then the regime change didn't come, the uprising didn't come. On the contrary, like a rally around the flag set in, and people started supporting it.

Then they went to an extended blockade. That didn't work either. The strategic petroleum reserves of the United States were going down. Then they had to go to diplomacy and beg the Iranians, which they finally agreed to, to give them a pause. The ceasefire was a pause. We also now know why this ceasefire reads so beneficial to Iran. It's because the United States never intended to keep to it for a long time. Anyhow, Donald Trump signed that document because he was aware that this is toilet paper, that as long as it buys a couple of weeks of pause or months of pause, then that's fine. That's all that's needed, and then the U.S. will continue anyhow, and it will break all and any kind of agreements on that ceasefire memorandum of understanding.

Anyhow, therefore, he had no problems with signing it. And then we saw how they immediately tried to sneak in all kinds of shenanigans, also with the Strait of Hormuz, sneaking in the second channel that they administer and so on. And Iran didn't have any of it and immediately went back to its military approach, seeing that the diplomatic approach was obviously, again, just a trick by the United States to buy some time. And then the U.S. was forced to go back to its military approach as

well, which again is failing because the Iranians have the upper hand when it comes to retaliation strikes. The Iranians have, at this point, escalation dominance because they can choose if they want to strike, yes or no.

And whenever the other one then strikes back, they can choose again what they strike back on. So the United States is the one that constantly needs to think about, should I or should I not strike? Should I or should I not? Because they know by now it will hurt them even more. And the U.S. strategy is not built around the idea of absorbing. No, it's the Iranian strategy that's built upon that. That's why they can absorb shocks, because they've got this kind of thinking in levels of layers and escalations. That's why their strategy is suited to what is happening right now. The U.S. strategy is not. It's not adjusted to what is happening right now.

The Iranian strategy is actually breaking the U.S. strategy again because it is able to get through all of these layers of military and defense, all of this kind of Star Wars thinking and technology thinking that is at the center of the U.S. approach, and the Iranians are able to get through with that. So the longer this tit-for-tat keeps going on, the longer the military escalation keeps going on, the more the United States hurts. Iran can take this hurt; the United States can't. So the longer it goes on, the worse it gets for the United States. And maybe what we are seeing right now is the admission that this strategy is failing and that they're trying to go another way, and that the United States might now be forced to make concessions.

The fact that the tweet by Mr. Trump also explicitly mentions Israel is a hint to me that they are now looking at, again, some form of understanding that would wind the military affairs down. If this understanding is, again, just hitting the pause button and it's just as phony as the first MOU, then that's what it is. But again, they're forced to switch to something else. This brute force, again, landed in an Iranian wall that they managed to set up. And I do apologize because I realize I used the word "again" a lot today. If I said it so much that even I realize it, it must have been pretty bad. But that's where we are. And that's the kind of analysis I want to leave you with. There will be updates soon. Please follow us on Substack and on our own platform, neutralitystudies.com. We put all of our analysis there as well. Thank you for your attention.