



Middle East Turmoil, Iran, Hezbollah, and More with Former CIA Officer Mike DiMino

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Michael Tracey (MT): So now we're going to go to our first guest, Mike DiMino. He's a former CIA officer. He's also an analyst at Defence Priorities, which is one of the vanishingly few think tanks in Washington, D.C., that is usually mostly sane. So we're going to go to Mike for the latest kind of intel assessment of what's happening in the Middle East. Mike, how are you today?

Mike DiMino (MD): Doing well, Michael. It's good to be with you. You've been doing a good job this week. I like the tie tonight.

MT: Appreciate it. You look great yourself. I like the beard. One of my few offerings of sincere praise for JD Vance is that he's really been historic in combating what I think is the most pervasive prejudice in American politics, which is beard phobia. So, you and I are beneficiaries of him breaking the glass ceiling in that regard, at least for the first time since the 19th century or something. So what do you make of this killing of Haniyeh in Tehran? And it was pretty shocking to me. Maybe I shouldn't have been shocked when I woke up and saw the news – right in the middle of Tehran, around the time of the inauguration of the new Iranian president that he was attending, we're told – is this an even more brazen attack by Israel, assuming that Israel conducted the attack? Obviously they're not publicly acknowledging it, but that seems to be everybody's assumption. So is this more brazen on Israel's part? Israel's part is the narrative that I was kind of sketching out there, to the extent that you heard it, that, you know, you could just look at the chronology. Netanyahu was just in the US shoring up his political support and then suddenly you have this massive escalation. I'm not saying that it was all foreordained or predetermined? I'm not asserting any kind of conspiracy, but obviously Israel relies on the US for its political military backing. And so, you know, that could have some role in maybe, authorising – even just implicitly, they're undertaking this incredibly brazen attack, it seems. And then also with the assassination of the Hezbollah commander in Beirut.

MD: Yeah, I think it is significant. Unexpected? Probably not, given the fact that if you look at public statements from Prime Minister Netanyahu, from Benny Gantz, or from really any Israeli officials going back to October 7th. They vowed that they would do whatever it takes to go after the people responsible for October 7th. So I don't think it's unexpected that they would do this. I think the timing, though, is very notable given the Beirut strike just hours before and then, you know, as you alluded to, I think a sense, globally, but certainly also here in the United States, that hostage negotiations were proceeding. In fact, you know, in candid conversations a couple of weeks ago, I recall Tony Blinken and Jake Sullivan to the press and at the Aspen Security Forum saying, "you know, we're on a ten yard line with hostage negotiations". So all of that has changed very, very rapidly. And like you said, I mean, we can speculate about why that is or how we got here. I think the bigger point, though, like you alluded to in your monologue, is: at what point are we in a regional war? I mean, you kind of did a nice job running through the landscape of everything going on with the Houthis, everything going on in Lebanon, everything going on with Hamas in Gaza and Iraq and Syria, with these Shia militia groups. I mean, we're sort of already there. We're very lucky that it hasn't gotten to a point where we are at what I would call an open state of war between Israel and Hezbollah, which I don't think is, certainly in anyone's interests. It's not in US interest, and frankly, it's not in Israel's interest. You know, Benny Gantz and other people have made statements that war with Hezbollah – they could defeat them in three days. And I would just say as a military analyst and a former intelligence officer, that's just not true. Just strategically speaking. So it would be a huge change to where we are already, right? I mean, a conflict with Hamas is relatively easy to contain for the Israelis, but a war with Hezbollah, I think would be even greater in terms of scope and scale than the last two or the last time that they really butted heads, which was, of course, in 2006. And militarily the Israelis did not fare super well during that conflict.

MT: Yoav Gallant, the defence minister, tweeted that the strike in the Golan Heights that killed, I think it was the 12 Druze, mostly children or teenagers, crossed a red line. Now of course that's a cliché that gets invoked a lot. It's hard to really demarcate where any red line is or what it means to cross it and what kind of response that is supposed to engender. But it did seem to signify that Israel was going to take more aggressive action against Hezbollah than perhaps they have as yet, at least since October 7th. Do you anticipate that the Beirut strike is kind of the totality of it? I mean, it's hard to say, and nobody can predict the future, but just based on your assessment of what the lay of the land is thus far, does Israel appear to be gearing up for a ground offensive into Lebanon? Or does a rather adventurous strike into Beirut – does that kind of suffice in terms of their, you know, red line proclamation? As best you can tell.

MD: Yeah, well, I think you have to look at the statements of Israeli leaders. And I think you also have to look at what's observable on the ground. And if you take those two indicators, everything points right now to Israel gearing up for additional military action. There have been Iron Dome batteries surged to the north over the last just eight or so hours. There's been movement as far as allocating Israeli brigades from Gaza to the north. And then, you know, you played part of Netanyahu's speech earlier today. A part of it that you didn't mention,

which I found very notable – around the middle of the speech there he said there have been voices inside and outside of Israel. I thought it was very notable that he used that phrasing. I'm not sure if that was even potentially a shot at President Trump's early statements on this several months ago or something else. But he said, and I have a rough kind of translation here: "Voices inside and outside of Israel have told us to finish the war, and we cannot win. And I will not listen to those voices now and I have not listened to them before." So I think if you're taking those statements at somewhat face value which I think we kind of have to do, every indication would point to a commitment on Israel's part to go forward with more sustained combat operations against Hezbollah. And if you look back at broader Israeli actions and statements since October 7th, I think it's clear that they want to take the security environment that they faced prior to October 7th and now change all of that in the aftermath of October 7th. And that, of course, entails a buffer zone in the south against Hamas. And it also entails settling this open question which the UN and other bodies have tried to address and they've failed to address. Kind of, as you pointed out in your in your monologue earlier, you know, I don't know how effective international law is, when the chips are down – but this question of the Litani river where Hezbollah is operating and about 60,000 to 100,000 Israelis have been displaced in the North, there's a lot of domestic pressure on them to settle that issue as well. And of course then the big question is Iran or some of these other second order security threats that Israel feels the need to try to fundamentally change the nature of the environment of. And the big question is, what is the US going to do? And I think it's funny, we talk about the US as slipping into war or getting dragged into war, whatever – last I checked, we are the global hegemon. We are the undisputed global superpower, at least for the time being still. And if the United States wants to avoid participation in a war, it has all the agency in the world to do so. To make it very clear to the Israelis, to the Egyptians, to everybody in that region that the United States is not going to participate in this. I think you've seen some statements from the Biden administration about trying to emphasise defensive support for Israel, but even that can get you potentially into a situation where American F-18s are bombing targets in Lebanon and things like that. So it is a very slippery slope. I don't like to say that anything is inevitable, but I think you have to be concerned if you're a Middle East watcher over everything we've seen in the last 72 hours or so.

MT: And as Ukraine teaches us, the line between offensive and defensive weaponry or military support kind of collapses into conceptual nothingness at a certain point.

MD: Right.

MT: So why wouldn't that same standard apply to Israel and Lebanon, theoretically? In Lebanon, people might not be fully aware of this, but the Lebanese central government is a long time recipient, actually, of US foreign aid. The US subsidises the central government of Lebanon, but Hezbollah controls the portions of the country to the south. And Lebanon has a very convoluted governance structure dating back to when it was a French colonial holding and obviously doesn't have a strong central government because it's kind of divided into these disputed territories. But one thing that I've been reading is that even the factions of the Lebanese government that are opposed to Hezbollah and loyal to the weakened centralised

government would view any offensive by Israel into Lebanon as not just an attack on Hezbollah, but an attack on Lebanon as a whole. So how does that dynamic play into any kind of forecast that Israel or the US might make? And just explain how Lebanon is constructed in that sense, and how it would absorb or how its populace would react to any major escalation by Israel?

MD: Yeah. Lebanon is a really fascinating case. Having spent a lot of time in the region, you've had all sorts of strange arrangements where they have quotas for different government positions socially and all sorts of strange dynamics – a lot of which, like you said, goes back to French colonialism. I think it's interesting, after the Beirut ammonia explosion a couple of years ago, Macron, I believe, came out and said we should reopen the question of French colonial involvement in Lebanon which was totally mind blowing and ridiculous to me. But, yeah, Lebanon's an interesting case. I think the big issue is who has a monopoly on violence. If we're talking about Lebanon, it's certainly Hezbollah. The Lebanese military is very small. It's unprofessional. It's poorly trained. There isn't much that Lebanon can do about the fact that Hezbollah is so dominant in the southern half of the country and really does have a monopoly on violence there. And I think it problematizes as the situation is such that even if Lebanese civilians are not comfortable with this or the average Lebanese person is not comfortable with this, there could be a situation where because of Hezbollah they're sort of enmeshed in this conflict. And Hassan Nasrallah has tried to be cognizant of that with some of his statements. He knows that a major war with Israel would be politically unpopular in Lebanon. Certainly the legacy of 2006 is still very much alive and much of the populace there as a painful memory. And so he can say what he wants about a boisterous response. But I think there is some sense that even Hezbollah has to be careful about losing public support. And the other thing I'd mention is that Hezbollah has a significant amount of capabilities. And again, this gets back to my earlier point that this notion that they would be defeated in a matter of hours or a matter of days is just not accurate.

MT: Right. So what about this report today? The New York Times citing four Iranian officials said that the supreme leader Khamenei has directed a retaliatory attack on Israel. Now, we saw one of these in April, the circumstances of which are still a bit mysterious to me anyway where you had this volley of missile fire from Iran toward Israel. And obviously the US was heavily involved in the air defence. It was coordinated with the Jordanians and actually seen as a triumph of Israel's ability to coordinate with friendly Arab states in their mutual defence. Now, some of that narrative could be self-serving but it is true that the salvo of missiles did not cause as much damage as you might expect just in a vacuum. How do you compare and contrast the lead up to a potential attack by Iran on Israel now to the lead up to that attack in April? Is this one more severe, potentially in your mind, or what are the differences there, if there are any?

MD: Yeah, I think April was a really interesting case. You had a lot of people going on cable news the day after talking about how this was Iran's best punch and it was a total failure or whatever. And that's just total context denial. First of all, Iran used a very minuscule portion of its arsenal in that attack. They telegraphed it three days in advance. The Swiss knew it was

coming. The Turks knew it was coming. There was all sorts of diplomatic back channelling that happened in advance of that. And I don't think that Iran was intending to do grievous harm to Israel in conducting that attack. I think they were looking for a escalatory off ramp with a sort of middle tier response in which they could say, look, we've shown that we can reach out and hit Israel, which of course had never been done by Iran to that point and signal that hey, if we have to do this again at potentially a greater scale and potentially over a more sustained time frame, we can do it. And so my sort of question right now is: do we see a similar slow build where I think Iran is clearly trying to look for an off ramp, or do we see a sudden and more sustained sort of attack using intermediate range ballistic missiles, cruise missiles, one way attack drones, similar to what we saw before, but maybe with additional armaments being employed by these Shia militias in Iraq and Syria against Israel? They mostly avoided hitting Israel. Or the Houthis, right? Which recently conducted that notable strike last week. So that would be what I'm looking at now is how does Iran want to play this? Do they want to telegraph in advance and try to seek a diplomatic sort of off ramp here, or do they feel the need to make a more compelling statement? I think if you're looking at Iran's position here, it's not great. I mean, it's very hard for them, I think, to make the case that they're competent as far as their intelligence services, as far as their ability to project power if you're going to have people, that are your ostensibly close allies getting assassinated right in your capital. And I think it gets to this broader issue of how we talk about Iran in the United States. Iran is not an existential threat to the United States. Iran is a middle tier threat to the United States, mostly as a result of the fact that the United States maintains 40,000 troops in the Middle East, right? It's sort of a time and distance thing. Iran does not pose the kind of threat that you could argue China or Russia or other actors poses, right? I mean, you even have a better argument – as critical as I've been of the war in Ukraine – you even have a better argument about being concerned about Russia, being very dominant in Europe than you do Iran, you know, posing some kind of massive and existential threat to the United States. So I think we have to be honest about their capabilities. They've got a very weak conventional military. I don't think they want a full scale war with the United States. I don't think they want a full scale war with Israel. They've had several opportunities over the past six months to say and do things that would indicate the opposite and they haven't. And I think all of that is notable. I think Iran recognises the limits of its national power and is sort of behaving rationally. And like you talked about in your monologue, I don't think that folks like Lindsey Graham or whomever else are ever going to really recognise that. But I think it is important to analyse these things objectively and sort of take stock of it for what it is. If we're going to complain about Iran's influence in the Middle East growing exponentially over the last several decades, we have nobody to blame but US foreign policy. Love or hate Saddam Hussein, he was the biggest regional counterbalance to Iran. He had the third largest military in the world. He kept the Iranians in check – if that's something that you claim to be worried about if you're Lindsey Graham. And of course, the United States went in in 2003 and overthrew Saddam. And we had a total power vacuum that was filled first with ISIS and then was filled with these Shia militia groups that did most of the fighting against ISIS and now basically control Iraq. So it's difficult to – like you said in your monologue – where do you kind of start the conversation when you're talking about the Middle East? You go back hundreds, if not thousands of years to address some of these problems. But I think the role of

US foreign policy in the last several decades, especially, is also a big reason why we are where we are – if we're not happy with Iran's influence and meddling in the region.

MT: Well, one of the constant refrains of Netanyahu and pro-Israel politicians in the US is to hype the threat of Iran and actually try to assert that whatever threat Iran is claimed to pose to Israel, by extension, is also a threat to the US. So people like Naftali Bennett and others use metaphors like Iran is like the tip of the spear – not the tip of the spear, that's the wrong metaphor – like the head of the octopus. Or like, they're always the ones that are controlling all these militia groups and others. The point is, they try to make it into this cosmic threat where once Iran is done with Israel, then they're going to go after the US, even if they don't have the basic military capacity to ever even fathom doing that. But that's the way to kind of galvanise support for Israel in their long standing quest to take it to Iran or at least Netanyahu's quest. Remember his famous speech at the UN Security Council where he's holding the placard with the cartoon of the bomb and saying "the clock is ticking, we have, I don't know how many weeks left, before they get the nuclear weapon". The nuclear weapon never comes. But then nobody goes and revisits that, apparently. And he made similar dire warnings in his speech to the joint session of Congress last week. So it seems like however much you want to put a rational spin – and I appreciate that, obviously, on the threat that may or may not be posed by Iran, it seems like it's very central to the case that pro-Israel politicians are always beating us over the head with in the US. Isn't that right?

MD: I think the bigger problem that I see is that the Biden administration has willingly conflated all of these various conflicts and sort of bolstered that narrative that you just outlined. I mean, I think you had Karine Jean-Pierre and I think you had Adrian Watson, I believe, the NSC spokesman a couple of months ago when this conflict started between Israel and Hamas use phrases like the Russia-Hamas axis and stuff like this. And you've seen the same thing in Ukraine that really our fight with Russia is also our fight with Iran is also our fight with China. It's all the same thing in this big battle for global authoritarianism versus democracy. And I think all of that is not just factually incorrect but it's also very dangerous because if we're going to act like we're basically already in a world war and that these are our indefinite adversaries forever, then it's sort of a self-fulfilling prophecy. And I think that's completely irresponsible from a policymaking perspective. And then I think on Iran nobody ever gets into the actual nitty gritty, right? Which, as a policy guy, that's what I do. Iran does not have the capability to hit the United States with a nuclear weapon, even if they had one. They've tested two space launch vehicles, right? Which sort of are dual use for something like an intercontinental ballistic missile. They've had issues with both of those tests and they've shown no ability to bring something back down once you get it up there, once you get it up in space, which is really the hard part. So again, even if we're talking about what Iran's capabilities are, the math doesn't really math. But I think the broader problem is this rhetoric that frankly everybody has engaged in. Whether it's Lindsey Graham, whether it's Joe Biden, it's the same rhetoric of this global war between democracy and autocracy. And all of our enemies are exactly the same, and they're doing exactly the same things. And there's no nuance to any of that and there's very little accuracy to it as well. And I think that only puts us in a position where we have to fight this sort of existential conflict which, frankly, doesn't

exist. And I think that's what I would come back to. There are definitely real threats posed by the rise of China to the American economy. Iran, yes, has killed American troops via its involvement in the Middle East over the last two decades. I'm very clear eyed about the bad things that many of these actors have done. But I think we have to be treating each one of them uniquely. And we have to be looking at policy options to separate them rather than just push them together and sort of build an alliance of our own making arrayed against the United States, which I think nobody really wants to talk much about in DC – the extent to which the United States has pushed together China and Russia and Iran and North Korea and how dangerous that really is in the long term.

MT: Finally, Mike, I can't resist, but put to you a more nakedly political question, because whether you and I like it or not, that has to be part of any comprehensive intelligence assessment that we make of any of these situations. You have Donald Trump going around and saying that Joe Biden and Chuck Schumer – they're Palestinians. He uses that as a term of derision, I guess, to indicate that the Democrats have taken this hard turn toward being pro Hamas sympathisers, which to me just seems ludicrous, given that I think by any objective measure, Joe Biden and I guess, by extension, Kamala Harris, have supplied more armaments to Israel in furtherance of an ongoing war effort than any presidential administration ever. And yet the Republicans are attacking the Democrats for being insufficiently bellicose with regard to their support for Israel. And, likewise, I guess Kamala Harris has garnered this seemingly unwarranted perception that she might be slightly more moderate on Israel than Joe Biden has been. Or at least there aren't clips of her from the 80s and 90s proclaiming herself to be a Irish Catholic Zionist. So that's potentially a distinction. I don't think it amounts to much in practice. I've seen very little evidence that it does, anyway, in terms of the substance of their respective policy views. But what's your outlook on the presidential campaign and how would it factor into any geostrategic assessment of the lay of the land at this point?

MD: Yeah. Look, I think, the notion that – I've been asked about this a lot over the past couple of weeks, especially given everything going on in the Democratic Party over what is Kamala Harris's foreign policy. And I would say that it's what the Democrat foreign policy is, right? I mean, I don't think we have a lot of evidence that she has a lot of clearly staked out, clearly fleshed out, really unique, really discreet, really idiosyncratic views on a lot of this. And so I think those questions should be put more to her and to her campaign over the next several months. I mean, we've got 97 days until the election. I don't think we really know much about her nuanced foreign policy views but I would say the idea that she's going to be significantly less supportive of Israel than her current boss – I don't think there's much evidence for that. And I would say that broadly in the United States, both parties, like you've talked about a lot tonight, are pretty supportive of Israel. And I don't see, frankly, a significant difference as far as the policy outcomes. I think, like you mentioned earlier in your monologue, the language, the rhetoric, the branding is a little different. But at the end of the day, yeah, the Democrats find a way to sort of support many of the same things that the Republicans do on these issues. And so I think any kind of really unique, foreign policy perspective emerging from her is unlikely. Of course, I'm open minded to it. I think we don't

know but I would be a little sceptical of that. And of course any kind of rhetoric that is dehumanising about an act of war. As somebody that has spent time in war zones and seeing these things firsthand, I don't really appreciate it. And I think that it'd be nice to have a more sane sort of discourse on this in the United States. I don't know if that's ever going to happen. I think part of me holds out for a lot of the generational divides that I think are very stark on this issue. And who knows? 20, 25 years from now, you may have a very different perspective in the United States on not just foreign policy broadly, but certainly on the US role in the Middle East. I do think there is more space on the right at the moment for some of these more realistic, pragmatic, we-should-be-prioritising-things kind of arguments. You've seen Bridge Colby make these arguments. J.D. Vance has made some of these arguments.

MT: Sorry to interrupt, but they haven't made these arguments on Israel, right? I mean, J.D. Vance certainly hasn't. Nobody – very few House Republicans aside from perhaps Thomas Massey have made such arguments. So I don't see where this space is emerging in respect to Israel.

MD: Yeah, I think that's fair. I think that's fair. My point is more about – I think it's becoming a little bit more commonplace, in some of these discussions to say, look, whether people agree with it or not, the United States should be prioritising China. And I'm not particularly a China hawk. I don't think we should be fighting a war with China over Taiwan. Certainly not over semiconductors, but –

MT: I just worry – sorry to interject again – I just worry that prioritisation becomes a euphemism for preparing for war with China. So shifting priorities doesn't really bring me much reassurance if it's just another word for let's militarise the so-called Indo-Pacific, another weird euphemism, in anticipation of a war that we're going to claim we're going to deter. But then we could almost just as easily be provoking. But that's another subject.

MD: Yeah, I think what I'd say just kind of to wrap a bow on that point is just the mere concept, Michael, that the United States has to make any choices about its foreign policy, that it can't be everywhere and do everything all at once is so novel, that I'm frankly excited by it. And of course, it's not going to solve every problem overnight. And I do think you have progressives on the left that are also interested in realism and restraint or prioritisation or whatever kind of buzzword you want to throw on it. And so I am positive about that. I'm not saying, of course, it's going to solve all these problems overnight. And yeah, what good is it to deliver from the Middle East if you're just going to repurpose all of those assets elsewhere and fight a bunch of wars elsewhere. So I totally agree there. I think the bigger point, though, is the neo conservative and neo liberal internationalist view on foreign policy for the better part of 80 years now, really since World War Two, has said that there are no choices, there are no questions. And there are no trade offs. And so I think it is good, even if there are baby steps to be at least pushing in that direction.

MT: Right. Well, Mike DiMino, thank you for joining us. And remind us where people can follow you.

MD: Yeah, sure. We've done a lot of great Twitter/X spaces together in the past. I've enjoyed those. I'm at @mpdimino on there. And you can also check us out at Defence Priorities. We're trying to instil a little bit of pragmatism into US foreign policy. So whether you're on the left or the right or you're a libertarian, please join us in trying to do that. Because I think, as we've seen in the last couple of weeks and as we talked about tonight, we're very close to some major conflict here. And so we got to do what we can to avoid it. Thanks for a great time with you tonight, Michael.

MT: You too. Thanks a lot. Take care.

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