



From Gaza to Doha to Tehran: Nowhere to Hide

September 17, 2025
Featuring Rich Goldberg
Hosted by Mark Dubowitz

GOLDBERG: And what if Iraq becomes our energy partner? Not Iran's energy partner. We actually push Baghdad to end its reliance on Iran once and for all. You will force Iran out of Iraq if you focus on it from the energy lens and pry Iran's hands out of the energy sector and out of the financial sector while also disarming the militias that threaten both the energy and financial sectors of Iraq, make it an actual U.S. partner, get our ROI finally out of this partnership of so many years that so much sweat, blood, treasure has been poured into. And now Iran's fallen back within its borders. Game changer. To me, Iraq is the Alamo at this point. I truly believe that.

DUBOWITZ: 12 days of war. Missiles from Tehran's proxies. Israeli strikes across the region. And now? A shockwave: Israel hits Hamas in Qatar. Doha is a safe haven for Hamas terrorists, the banker for Iran, and Hamas, the host of America's biggest base in the Middle East. What does this mean for deterrence, for Tehran and for Washington? I'm Mark Dubowitz, and this is "The Iran Breakdown." I'm joined by my longtime friend and colleague and top expert on many things, Rich Goldberg, to dissect the 12-Day War, the strike in Doha, and whether America is ready to confront the Axis of Aggressors or stand aside. We're also going to discuss Rich's most recent job at the White House where he helped set up the National Energy Dominance Council and what does America's energy dominance mean for our war against the Islamic Republic of Iran?

Rich, welcome.

GOLDBERG: Thanks. Great to be back.

DUBOWITZ: Yeah, it's great to have you.

GOLDBERG: I feel like my last podcast was right before I went into the White House and maybe a good preview of what was to come and now full circle.

DUBOWITZ: Yeah. Your last podcast really was a great preview, what was to come. And I have to say, Rich, you were absolutely correct. There were many people including me—

GOLDBERG: Can we just stop the podcast right there?

DUBOWITZ: We could end there.

GOLDBERG: That's perfect.

DUBOWITZ: You were absolutely correct.

GOLDBERG: No, go on.

DUBOWITZ: There were many people, including me, who actually had some doubts that President Trump was willing to order military strikes against Iran's nuclear facilities. You had been saying all along, I mean, since first term Trump, and then certainly since January that you had full confidence that President Trump was going to make the right decision with respect to, if necessary, using military force. So kudos for calling that.

GOLDBERG: I did. I mean, if you look at his record for all of the criticisms of all of the worriers out there, diplomacy is not a bad word. Diplomacy is what you lead with. It's what he leads with. It makes people uncomfortable because of other presidents record of diplomacy, which wasn't diplomacy, it was appeasement. And so I think we're in this diplomacy, appeasement PTSD as those who watch foreign policy where, "Oh, you want to talk to the Iranians? Oh my gosh, we're going right back to JCPOA [Joint Comprehensive Plan of Action]. We're going back to your own nuclear deal." I've never believed that's the case. I think it's important that he leads with diplomacy for the American people to show that all options



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have been exhausted diplomatically for our allies. And then a clear bottom line for our national security. Crazy terrorists cannot get a nuclear bomb. And he did not allow them to do that.

DUBOWITZ: Yeah. Now to be fair, I mean Steve Witkoff had gone to Oman on I think about three occasions and had already provided concessions that Iran could have enrichment. And I think the President had been less clear in the beginning. Then, as you remember, 52 out of 53 Republican senators and 170 House GOP members said a very clear letter and a clear message to the president and to Steve Witkoff that the only acceptable deal was zero enrichment and full dismantlement. And then I think the administration's position became very clear.

I think the Iranians in Oman thought, "Oh, here we go again. We can run circles around another American president." And I guess they hadn't met Donald Trump, but it was at that point that I think President Trump lost patience with diplomacy and with the Islamic Republic. And then the rest is the 12-days of war and what followed. So good results, but I think the warriors amongst us, I was one, we're very concerned in April, May, that we had conceded enrichment and we were heading to a JCPOA 2.0. But it certainly worked out better than expected. So good call, good analysis.

GOLDBERG: I think there's also a process analysis of maybe how the president works of empowering people around him we trust to go out, see what the art of the possible is, have discussions. He may not be in the weeds at that point. He may not be saying, "Okay, what does this look like? Are we actually granting enrichment? Are we actually going to go back to JCPOA? How are people going to interpret this? How do the Iranians interpret this?" And then you don't know that once he actually sees details, gets analysis, sees senators weigh in on certain details where he says, "Yeah, that doesn't make sense to me. That's not a good deal." He gets to have the final word. And so I think that is instructive, and I think we see that in other contexts like Russia and Ukraine.

DUBOWITZ: Actually, that's very, very interesting. So, Rich, you served in the first Trump administration, second Trump administration, long time national security advisor in the Senate. You worked in the House, chief of staff to the governor of Illinois, Navy intel reserve officer. I'm probably missing a lot of other great things in your bio, FDD senior advisor, for example.

GOLDBERG: *Fdd.org* you can find it all.

DUBOWITZ: It's all there. But you've had a very distinguished career in public service and national security. Did the US and Israeli success in the 12-Day War surprise you? Been a long time player on the Iran file.

GOLDBERG: It did not surprise me. In fact, I would've been surprised if a decision had been made to go and they had not inflicted as much damage because of the risks involved. My assumption, this is without any intelligence, this is just open source analysis. Our many discussions with interlocutors, looking at how the Israelis think about the threat, how we would think about the threat, how I would plan for the threat. We've always seen this as a hybrid approach, right? They have some sort of munitions teased out last year during the initial reaction and retaliation against Iran after the Iranian ballistic missile strikes.

DUBOWITZ: During April and October of last year.

GOLDBERG: Exactly. We saw the Israelis fire the first one, some sort of standoff weapon, went and hit a radar. It was the warning message that clearly the supreme leader didn't receive, but showed that they'd been working on some sort of capabilities. There were leaks unfortunately that came out of leakers, again, referencing some sort of new capabilities. So they have some sort of kinetic plan of some extent to be able to take out air defense demonstrated that robustly in the fall. And the second retaliation against Iran obviously could do whatever is remaining to Iranian air defense with various assets and various platforms and ammunition's. You have human intelligence, they have human people on the ground from the



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Mossad operatives. We've seen assassinations before. We've seen sabotage before. You would think that would be coordinated at the same time, they have incredible cyber capabilities.

You would think that would be coordinated the same time, and then creative other things that we just can't even get our imagination around, right? We've seen drone attacks from inside of Iran, copper quads that are just carrying certain munitions. We've seen attacks reportedly maybe from Northern Iraq launched other areas. So if I were to roll this out and think about it from an Israeli perspective, you would have all of them sequenced to go all at the right time where the stars are aligning and your intelligence folks on the ground say, this person's in position there, this is there. Fire the missile here, hit the cyber attack here, launch various aspects, et cetera. What I think probably surprises most people is how extensive the cooperation and coordination clearly was with the United States. And that doesn't happen overnight.

And the deception campaign by the president and senior leaders that you've talked about here on the podcast in the past and in your public commentary, everybody saw that. And the logistical support that we provided, the intelligence support, anything else that is still not public, that one day we might find out about in coordination, all of that clearly combining at the right time, the right place, the right mission to do incredible damage. What I think was surprising potentially to people was the final exposing that the Israelis did in fact need, or at least desired, U.S. military action against the final blow against the key sites that were deep underground and needed a massive penetrator from the United States to take out with a platform like the B-2 that could only deliver that. This had been a debate for a long time. We sort of always knew they could degrade, they could take out, they could damage, they could set back, could they destroy on their own?

And by the way, the answer could still be, maybe, could have. Had they faced a president who said no, they would've had to do something on their own and do as much damage as possible. And maybe there are cards they didn't have to play. But clearly they did want the B-2s. They did want the MOPs [Massive Ordnance Penetrator] dropped and the president was willing to do that as the closing act of the conflict. And it apparently obliterated these key nuclear sites by doing that. So the only surprising piece was I always sort of felt they had capabilities. They were not going to show their cards. It would be a hybrid approach. It would do a ton of damage sequencing on command and control, communications, leadership and key military and nuclear sites. All of that played out exactly right. And then this question mark of can they do Fordow on their own? Can they do the big jobs on their own or do they need the United States military? At least for now, appears the answer was they needed us and this president came through.

DUBOWITZ: Yeah, I mean, I think it's a good thing that they ended up needing us because it ends up being a big win for the United States.

GOLDBERG: Yeah. A big win for the president.

DUBOWITZ: And a big win for the president. And he made it very clear a couple days into the 12-Day War, we own the skies even though it was Israeli pilots flying overhead in American fighter jets.

GOLDBERG: Correct.

DUBOWITZ: We own the skies. And he made a point of saying it was also U.S. military equipment, those platforms that were being used by those fighter pilots and those missiles.

GOLDBERG: And you think about all the sorties going through of Israeli jets and all the munitions deployed and all the people on the ground doing covert activities. Not a single American in harm's way for those dozen days. And B-2's out of harm's way, dropping incredible munitions, precisely, "beautiful B-2's," as the president said, obliterating the nuclear sites. That means the investment in Israel as our aircraft carrier of democracy in the region against threats to the United States,



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against a regime that is trying to assassinate the President of the United States that sponsors terrorism, that's proliferating missiles, trying to build missiles that carry with a nuclear weapon to hit the continental United States.

All of that carried out up front by the Israelis at their risk, pilots who could have been shot down, hostages, POWs, casualties, all of that at their risk with U.S. platforms showing the Russians, showing the Chinese that our equipment, our airplanes, our munitions are the best. What a great ROI. It was marketing for the U.S. military. It was national security, actual ROI in a huge way. And the president still comes in at the end and after obviously providing a ton of coordination behind the scenes to make all of that possible, to have the closing act be the B-2's, and to really be the praiseworthy leader who removed the precipice of an Iranian nuclear weapon. Amazing.

DUBOWITZ: Amazing. Well, let me ask you, there's a lot to talk about the 12-Day War. I think I want to return to it, but in the past couple days as we record this podcast, the Israeli Air Force went after terrorists in the heart of Doha, Qatar. Now this is not inside Iran, this is inside Qatar. And I think at FDD, we consider Qatar to be a highly problematic country for reasons that it's closely affiliated with the Muslim Brotherhood. It's given shelter and comfort and financing to terrorist organizations, including Hamas. And it's also considered by people in the administration and by people in the military to be a close American ally. We have our most important base there. Al-Udeid, which is headquarters for Central Command and Qataris are only 330,000 people.

But they've certainly spent hundreds of billions of dollars, I would argue on the most successful influence operation ever run against the United States. So it takes a lot of courage, a lot of political courage for the Israeli Prime Minister to make a decision to hit top Hamas leadership in Qatar. We still don't know the battle damage assessment of who they struck and who they eliminated. But putting that aside for a moment, Rich, how do you assess that decision? And there's also been a lot of talk that this was done without U.S. knowledge, U.S. coordination, and this was just a rash decision by an out of control Israel to hit Hamas in the middle of Doha. What do you make of those arguments?

GOLDBERG: Well, first of all, the President's statement is very carefully parsed to be talking about the morning of the strike U.S. time, just getting a heads-up as the military's going, and then instructing Steve Witkoff, et cetera. He doesn't say they didn't learn about it. Also, previously, they didn't have discussions before that morning with a military heads up. He didn't say whether or not he pre-cleared it or was okay with it if he discussed it with the Prime Minister in advance. So he leaves that out of the statement.

DUBOWITZ: And he certainly didn't say that he didn't.

GOLDBERG: Correct. That's what I'm saying. So you're just starting the world according to the event that morning with no foreclosing, that something happened before that morning. And then very unfortunate that this had to occur in Doha, the capitol. Not unfortunate that these were Hamas people that were targeted. He actually says that's good, but unfortunate it had to be in Doha.

DUBOWITZ: It is unfortunate.

GOLDBERG: That's unfortunate.

DUBOWITZ: That it's unfortunate that they were in Doha.

GOLDBERG: It's unfortunate that the Qataris harbor Hamas, unfortunate, unfortunate, close ally, talked to Netanyahu immediately. He wants peace. This could be a major opportunity for peace. I think if you actually read this statement and think about how President Trump talks, what he is saying between the lines, this was obviously pre-coordinated, this was obviously approved by the president himself. The prime minister of Israel, given all the things in the air, is not going to send jets to fire off munitions within a couple of miles of a major U.S. airbase, which is covered all around by significant



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U.S. air defense assets and radar systems that can pick up all the threats, with the U.S. Air Force, by the way, there at the air base ready to intercept threats potentially coming near the base, and drones and other things. You wouldn't do that.

It wouldn't make sense for the Israeli military not to coordinate, just from their own safety of their own pilots. And of course, we don't know what we don't know on tanking and being able to get all the way down to Qatar and all the way back and any logistical support and intelligence coordination, etc. We don't know. Maybe there was none. Maybe the Israelis did it all on their own, but from an airspace coordination perspective, and bigger, the geopolitical consequences for Israel of going in, no matter whether you hit or not, cannot happen without talking to the President of the United States beforehand and making sure the military is prepared for it. That's number one.

Number two, whether or not you hit somebody, and I hope they got them. That'd be great. We'll find out soon enough. Remember, it took days to learn about Mohammed Deif. Weeks.

DUBOWITZ: Weeks maybe, close to months, yeah.

GOLDBERG: The Israelis I think took less time for their own, but that wasn't immediate even on their end. It obviously took a long time for Hamas to acknowledge it, but we'll find out. Maybe they missed, maybe they got them. Maybe they got some, not all. We'll find out. However, if you're the Qataris and you've been thinking, "Wow, we have played this game masterfully. We have buttered up the president, we have lubricated Washington with money, greased every wheel, both sides of the aisle, every lobbyist, every law firm, every former official on the payroll. People who will go back into government on the payroll, people in the cabinet who were formerly on the payroll. Real estate deals with people who will be at the right hand of the president, all these things."

DUBOWITZ: Higher ed., K through 12, right.

GOLDBERG: "And we will gift you a 747. We got them. We own Trump," right? That's probably what they think in Qatar.

DUBOWITZ: And we own America really.

GOLDBERG: We own America.

DUBOWITZ: State capture.

GOLDBERG: "We are sitting pretty," and oh, and they keep saying "we're indispensable to these talks. They love us. They can't touch us. We're invincible, so we can keep harboring Hamas, we can keep playing a double game. Nobody's going to have consequences for it." And they can tell that to the Hamas guys. "Don't worry, we are protecting you. We're your interlocutor. We want to get you the best deal too." Because in the end, they're the lawyer to the mob. They are part of the mob. They're not some independent interlocutor. They're not Switzerland. They're harboring Hamas. They are ideological and financial sponsors of Hamas.

DUBOWITZ: Right.

GOLDBERG: They're in the mob. They're the mob's lawyer.

DUBOWITZ: I'd argue that the mob's financier.

GOLDBERG: Yes.

DUBOWITZ: The mob's public relations wing.

GOLDBERG: There are a lot of different sectors, and yes, they're the entire C-suite for the mob perhaps. Yes, you're right. Yeah, and the Sovereign Wealth Fund. We can keep going on with the examples, but the point is now, you wake up and



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you realize, "I guess Trump owns us because he keeps saying all the beautiful things and he loves us and we're a close ally and we're going to get some defense agreement and this won't happen again, and he just, oh, he can't believe this happened. So unfortunate. Loves the 747, send that faster." But look what he just did. He just cleared the Israelis to go right into your country and take out the terrorists that you're harboring. Wake up, wake up to Hamas, wake up to Qatar, certainly wake up potentially to Turkey that also harbors Hamas. A little different there as a NATO ally, a little trickier, but-

DUBOWITZ: Also by the way, Muslim Brotherhood regime.

GOLDBERG: Of course.

DUBOWITZ: Right.

GOLDBERG: Of course, though the potential of an Israeli strike in Turkey seems more challenging and harder for me to believe than in Qatar, but still, this is a paradigm shift for the Israelis. Whether you get them or not, the Qataris are freaked out.

DUBOWITZ: Yeah. Actually, it's a very interesting interpretation because I like the way that you're describing this from the president's perspective. I mean, the Israeli perspective is obvious which is the long arm of Israeli justice. "We will hunt down Hamas terrorists around the world. We will repeat what we did after Palestinian terrorists massacred Israeli athletes in '72 at the Munich games. We will hunt them down. As long as it takes, no matter where they are, we will get them." And the Israeli case is an easy want to make, but you're right. From the president's perspective, I hadn't quite thought of that because it's a more complicated set of factors because President Trump has spoken very positively about the Qataris for many years. In fact, it's worth reminding our listeners that it was 2017 that the Saudis, Emiratis, Bahrainis and the Egyptians launched a massive effort to embargo Qatar.

GOLDBERG: That's right.

DUBOWITZ: And for the same reasons actually, the Israelis have problems with Qatar, connections with the Muslim Brotherhood, connections to terrorism, the use of Al Jazeera, its propaganda wing, to incite and inspire terrorists and certainly poison their publics.

GOLDBERG: By the way, what a wake-up call on Al Jazeera for them too, because Al Jazeera, they like to say, "Oh, we don't own Al Jazeera. It's just an independent television station. We can't control Al Jazeera." Great. Unfortunate that it happens to be based in your country, I guess. Al Jazeera, we can do things to Al Jazeera, maybe not a missile strike but we can take legal actions against Al Jazeera. We can shut it down, we can put sanctions on it. It's on the battlefield in Gaza embedded with Hamas. It's part of the terror infrastructure. Unfortunate that the television station is in Qatar, I guess.

DUBOWITZ: Yeah. I remember the former undersecretary of Treasury, Stuart Levy, who served both Bush and Obama, when he designated Hezbollah's TV station Hamas's TV station. He specifically said, "These are terrorist organizations masquerading as media outlets."

GOLDBERG: Correct.

DUBOWITZ: Which was a very specific intelligence finding and a very specific designation that you are not media outlets, you are terror organizations. And I've long thought that that terror designation should apply to Al Jazeera as well because then it opens up a whole slew of possibilities of how we can deal with Al Jazeera even beyond sanctions and legal action, but they literally are-



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GOLDBERG: And we now have a body of evidence of Al Jazeera employees co-located, working with, alongside Hamas taken off the battlefield, actual terrorists masquerading as Al Jazeera employees with the knowledge of Al Jazeera. Hamas is fully embedded with them. We absolutely should have the Treasury Department looking at a designation.

DUBOWITZ: That's right. That's right, and beyond. Okay. So very interested framing of the Qatar strike. So Rich, I want to get to the job that you have been doing since January, February when you entered the Trump administration this time around. Last time around, you were heading up efforts to counter Iran's weapons of mass destruction, and I think that's good news on the 12-day war. I want to talk to you a little bit more about that because I don't think this war is over, and I don't think the efforts to counter their weapons of mass destruction are over, but I want to talk a little bit about energy.

So you went into the Trump administration and really were the brains behind what I thought was a really interesting idea, which is to establish this National Energy Dominance Council. So talk a little bit about what is that, why did you think it was important to establish, and what are the implications in broad terms for American geopolitical influence, but specifically how it relates to the Islamic Republic of Iran?

GOLDBERG: So in our government, energy touches everything our economy, our national security. You think of AI. What is AI? AI is knowledge that's coming out of access to computing. You get access to computing from access to power to power that computing. If you want to actually make America energy independent and go beyond that to American energy dominance, you have to be drilling, you have to be building, you have to be mapping, you have to be mining, you have to control supply chains, all of this.

DUBOWITZ: Otherwise, you can be blackmailed by other energy powers.

GOLDBERG: Exactly.

DUBOWITZ: Including the Islamic Republic of Iran, and you may lose the AI race because you don't have the power to actually power the brains behind AI.

GOLDBERG: And you want lower costs for energy in America. It contributes to inflation when you have high energy costs, so this is a big economic driver, to make sure you have abundant low-cost energy. You want to make sure everybody in America can get American energy. There are places in America where you have to import energy because we don't build pipelines there. We've stopped doing it or somebody has interfered with doing it through regulations or state actions, like the Northeast of the United States that has to import its natural gas instead of getting it from Pennsylvania. So all of these things you put together, we have economic drivers for energy, we have national security drivers for energy, but it's huge. Oil, and gas, and nuclear, and coal, and mining, and minerals, and if you're into wind, and solar, that's a whole other thing. But new emerging technologies, and geothermal, and fusion, that's a lot. Okay, so I'm giving you the backdrop to ask a simple question. How many people in the White House do you think would work on that entire picture?

DUBOWITZ: Well, first of all, I imagine that there are, I don't know how many, multiple, dozen plus agencies of the U.S. government that touch energy.

GOLDBERG: Totally. Yes.

DUBOWITZ: You would think that given how critical that portfolio is, there'd be a big team in the White House coordinating all of those multiple agencies given the myriad of complicated issues that would be involved in that. So I bet you're going to tell me, not two dozen, not three dozen, but—

GOLDBERG: It used to be basically two.

DUBOWITZ: Okay, two.



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GOLDBERG: Basically two people at a relatively low stature in the White House who would report up the food chain of the National Economic Council. One person would think about domestic energy issues, one person would think about international energy issues and support the National Security Council that way, and somehow, all that we need to do to make America energy dominant, to drive down costs, to win the AI arms race through having enough power, infrastructure build and all these things would be accomplished. While you are correct, a couple of dozen different departments and agencies and sub-agencies have different pieces of bureaucratic control over regulation, over land use, over funding and financing, permitting, all that.

DUBOWITZ: And no one's coordinating that, except two low level—

GOLDBERG: It would come down to these two junior level people in the NEC [National Economic Council].

DUBOWITZ: Right.

GOLDBERG: There's no way you're going to be able to accomplish anything. And in fact, when you look at the record, this was a good secretary of interior, this was a bad secretary. This was a good secretary of energy, this was a bad secretary. They got some things done that somebody wanted to work on, somebody called the president. The president said, "Hey, work on this." This is what everybody worked on for a month. There's no actual tiger team working through project by project, just conveyor belt, where are we on this? Driving to results saying what are our metrics for success? How are we getting more oil out of the ground, more gas out of the ground? How are we going to export more oil and gas? What are we doing in the mining and minerals? How are we taking back control of the periodic table? Where are we on power? Is the grid resilient? Is the grid secure? How are we going to get this much more power to power AI? Where is it going to come from? How are we going to coordinate all of that?

So Secretary Burgum, secretary of the interior now, really had the vision with President Trump that you have to have an actual team, a council like the National Security Council that sits in the White House, chaired by the secretary of the interior, vice-chaired by the secretary of energy, but the council membership composing all of those departments and agencies that touch any piece of the puzzle. The Department of Defense, given all their procurement and energy use, the Department of Agriculture, the Forest Service and land use issues and farming issues, your biofuels. You have Department of Transportation with all kinds of different aspects.

DUBOWITZ: I'm sure the State Department has a role in this.

GOLDBERG: The State Department has tons of roles, both for international but also just cross-border issues with Canada or Mexico on pipelines. So everybody—

DUBOWITZ: I imagine our new Department of War, or formerly known as Department of Defense, probably also has serious equities in this, right?

GOLDBERG: Well, Army Corps of Engineers on actual construction issues and permitting issues, in addition to Defense Production Act sources of capital and uses, the Office of Strategic Capital inside DOD. Just making DOD land usable for R&D and fielding new small modular reactors, for example. Everybody has a little piece of everything here. Obviously, the Department of Commerce on all of our exports and the trade negotiations and the trade representative, all of that. That's huge, it's huge. The NSC can't coordinate, they don't have the expertise in energy.

They will have regional expertise and you can put them together with energy experts to support each other and then go support the Department of Commerce and the USTR [Office of the United States Trade Representative] in trade negotiations, or you plug it in. But to have a core team there that coordinates it and gets things done, and if you see a roadblock, you fix it. You call it out, you get it all the way to the president's level if you need it, fast, that day. Not in a year,



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not in six months. That day. Move on to the next thing, five things at once. Trump speed on all of these things. That's what's going on, that's the National Energy Dominance Council.

And so the president created it by executive order in February. It has a staff in the White House still chaired by Burgum, vice-chaired by Wright, but all the people in the government involved in it, the staff in the White House, dedicated personnel for oil and gas, dedicated personnel for power, all of the above that you need to think about having enough power in America to win the AI arms race. A dedicated team on mining and minerals, all of that there, and it's game-changing. It is totally, totally game-changing, and if there's one thing, anybody out there who doesn't know about it, get to know it. Call up, get involved, engage, because the policy priorities of the president are clear.

There's a green light across the board on multiple verticals. There's funding now in the One Big Beautiful Bill, and I think it's not just important for the energy industry for economic purposes, but it is game-changing for our national security.

DUBOWITZ: So I want to talk about the national security – I actually could do an entire podcast just on energy in the National Energy Dominance Council. I find it fascinating and I would note it's wonderful to have you back at FDD where I know you're going to be setting up a National Energy Dominance program at FDD to support the efforts of your former colleagues in the White House and across the interagency. But talk a little bit about why having energy dominance matters for the United States vis-a-vis our enemies. And in particular, since this is "The Iran Breakdown," what does it mean with respect to all the work that's needed against the Islamic Republic?

Because as far as long as I've known, Rich, you and I have been working together on Iran and energy because that was very much part of the entire sanctions architecture that was designed to go after the Islamic Republic's energy resources and drain it of the capital that needed to continue to fund terrorism, and nuclear proliferation, and missile proliferation, and the like. There were a lot of debates in the years over, could we go after the Islamic Republic's energy? Would we spike oil prices over a hundred dollars? What could the Saudis do to help us? I mean, you remember all of that, right? It sounds like having American national energy dominance and a council to actually promote this is going to put us in a much stronger position vis-a-vis the regime in Iran than we've ever been. Is that fair?

GOLDBERG: Yes, it already has, and I think it's documented evidence now from the 12-Day War of what the impact is. Energy independence was a nice idea 25 years ago. This was a good theme to rally around. We're dependent on the Middle East for our oil imports. We need to get off of Middle East oil. We need to be able to be self-sufficient. We won't be subject to disruptions in supply when a world crisis goes out. We won't have to go to war in the Middle East just to defend our oil interests.

DUBOWITZ: Because we'll have our own energy?

GOLDBERG: We'll have our own energy, right.

DUBOWITZ: Right, right.

GOLDBERG: That doesn't mean the same thing as actually having enough energy that as an overwhelming abundant exporter, in addition to having sufficient domestic need. You can work with the world's leading oil producers who are allies or partners to stabilize markets in times of crisis with them keeping the commodity price low or backfill partners who are distressed and look at additional levers to press either partners who are not being good partners or adversaries who are aligned with the enemy to have that flexibility without worrying about that price spike that we talked about years ago.

DUBOWITZ: So these isolationist voices, and I would argue hysterical voices leading up to the 12-Day War, were warning that not only is going to be World War III, but oil's going to spike to \$120, \$150 a barrel and collapse the American



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economy and the global economy and all of this would lead to a disaster. I mean, just as a data point, Rich, what happened to oil in the 12-Day War and in the wake of the 12-Day War?

GOLDBERG: We basically spiked about 10 bucks and then ended up lower than we started.

DUBOWITZ: We ended up lower than we started.

GOLDBERG: Yeah.

DUBOWITZ: Wow.

GOLDBERG: Now, we already had a pretty good baseline for various reasons that have been part of baked in policy so far, and Saudi reversals and on supply, and the market was already pushing crude prices down. And so we had a little bit of a cushion already built in.

DUBOWITZ: So quick spike, and then it came back down.

GOLDBERG: Yeah, you start moving – and it was all basically a risk premium, 10 bucks max that I saw at the height. It started already coming down a little bit mid-war, and then once the war was over, it really went down. Now, what didn't happen during the war, so this would be a counter argument, the Israelis did not target Kharg Island. They didn't target the Iranian oil exports. The fuel depots that they hit, a little bit of other energy infrastructure that they hit was domestic focused, domestic consumption focused, not export focused. So that the market watched and understood.

DUBOWITZ: Right, I mean, they didn't blow up major refineries.

GOLDBERG: Correct.

DUBOWITZ: Right.

GOLDBERG: The Iranians did not retaliate therefore against Saudi infrastructure. They didn't follow through on threats to close down the strait. Now, one might argue that you can counter that by saying, well, the Chinese were the ones who would be most affected by closing down the strait or attacking Saudi oil. And that our energy position as the United States gave us a lot of room to understand short-term spikes, no supply disruptions for us, really, potential supply disruptions for the Chinese. Go call the Chinese and say, "Hey, your buddies, the Iranians are making threats about the Strait of Hormuz or attacking Saudi. You might want to rein that in. It sounds like a problem for you." And in fact, I think that's exactly what we saw happen, and Secretary Rubio has talked about that playing out. But be that as it may, there is a time when the potential for all of that would have already been baked into the premium, would've already been part of the price spike.

DUBOWITZ: So \$30, \$40, \$50 risk premium rather than initial 10 that goes down.

GOLDBERG: Just total crisis, this is going to happen. They threatened to shut down the Strait of Hormuz, et cetera. Okay. So things could have ended up differently. Had they actually tried to interrupt the flow of oil through the Strait of Hormuz, I imagine we would've seen a higher price spike. I concede that. I don't think it would've been as high as some people have tried to protest or claim. I think if the Israelis had just taken out Iranian oil, I don't think that would've been nearly as high as people think. A million, a million and a half barrels off the market. We saw us do that to Iran once before, very quickly when Congress passed sanctions at a much higher oil price, and it was a \$5 premium basically when the president took off a million and a half barrels very quickly by ending the exemptions for oil.

DUBOWITZ: In first term Trump.



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GOLDBERG: In first term Trump, that was about a \$5 premium, and then it actually came back down lower over time. So we had already seen the trends in the energy market where American energy was moving in the first Trump administration. You're back and signaling to the market, green lights on production, green lights on American energy, and we work with the Saudis very closely to message to the market. Confidence. We are not afraid, even if there's some sort of short-term crisis here, we're not afraid there is enough supply in the market. That short-term there, I think it's interesting to reflect on how this crisis played out and how the market reacted to it. There was a lot of behind the scenes, there's a lot of coordination, a lot of messaging that still has to happen, but the market stood and said, we're going to watch. We're not going to freak out.

That is a change. Number two, we have expanded levers now because of our ability to produce, to export, to backfill, etc. During the war, you'll recall the natural gas that sits off of Israel and Eastern Mediterranean shut in, sales to Egypt ended, sales to Jordan ended. There were reports of potential blackouts in the future. The war would have to go on in Egypt. The United States was in a position to reach out and to talk to any partner that might need energy and say, "We got you. There are flows available. There's capacity. We can get you a backfill on gas." That's a game changer. We are not just afraid of the price. We're here as a supplier now in times of crisis, so we can be less afraid of the crisis enduring. We can actually project strength, dominate, support our allies, focus on the mission, not focus on second and third tier effects as much because we can compensate for that. We can mitigate issues.

DUBOWITZ: To sort of summarize, because again, you and I have been working on this sort of Iran energy issue for over two decades. I mean, for many years we always had to counter this argument that the regime in Iran was holding us hostage because of the oil markets.

GOLDBERG: Right.

DUBOWITZ: And to some extent with respect to natural gas, but it was mostly about oil and independence was about, well, we had enough oil for ourselves, but we're subject to the global oil price.

GOLDBERG: Yeah.

DUBOWITZ: As are many of our allies. And if price spikes to 120, their economies are in depression, and all of a sudden our major trading partners can't actually buy American goods and services. They held us hostage through oil. But you're saying, I mean under Trump one, I assume unfortunately to say, but under Biden, a lot of the regulations came back. A lot of the impediments came back, but Trump comes in, I'm going to unleash American energy once again, sets up a national energy dominance council to actually help coordinate that. But also there's a symbol that America is back and the energy, and now we can look at the regime in Iran and as you say, the Chinese, the Russians.

GOLDBERG: Correct.

DUBOWITZ: Others around the world and say, "You know what? We're no longer hostage to your energy blackmail." We can set the terms.

GOLDBERG: That's right.

DUBOWITZ: And we can be there for partners.

GOLDBERG: But I really want to really emphasize gas as being game changing for America. One of the most foolish things the last administration did in my opinion, was try to attack American natural gas, American liquefied natural gas. A halt to new export terminals, a halt to construction, not approving that. Somehow natural gas suddenly became unclean. It



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became part of the fossil fuel debate in climate, and we have to attack natural gas. That was nuts reversing that immediately—

DUBOWITZ: Isn't it nuts also from an environmental perspective? I mean, isn't natural gas—

GOLDBERG: Oh, of course, it's—

DUBOWITZ: From an environmental perspective, actually clean and makes the most sense if you want, actually reach your environmental—

GOLDBERG: And by the way, we are finally seeing blue states, like in the Northeast, come around to this for their own energy needs with their prices, et cetera. You have democratic governors in the Northeast that are pro-gas now, we are seeing a shift in this. But from a national security perspective, when you start day one and say full go, every moratorium lifted, every regulation lifted, go, go, go. Deals getting signed, off take agreements, new export terminals, you are able to step in, not just to say to partners, "Hey, I hear you might have an energy crisis right now. We can help you." But then you can go to other people like the Iraqis and say, "Why are you still importing gas from Iran? That's nuts. By the way, Iran is not exactly what it used to be these days. We actually have them by the collar at this point. Maybe you need to finally get off of their gas and we can help you and we can help you."

DUBOWITZ: And by the way, can I just add, I mean just because like to connect the discussion on both Iran and Qatar, I mean, Qatar is a major natural gas exporter, correct?

GOLDBERG: Yes.

DUBOWITZ: It makes trillions of dollars off its natural gas fields.

GOLDBERG: Our top competitor.

DUBOWITZ: Top competitor, I guess it's also a major gas field that they jointly own with Iran. So if we want to limit the influence of Qatar, Muslim brotherhood, and the radical Islam that they're exporting to the region and to the world and to the United States, pretty good if we can actually have our own natural gas power and leverage against Qatar.

GOLDBERG: Yeah. I will say that the Qataris are very smart and they have interwoven their own investments into American energy as well. Saudis and Emirates have a lot of investments in U.S. energy plays here in United States. Qataris do that as well. And so there are interdependencies here and there the way that the market works. So I don't want to oversimplify it, but yes, in general, when you think of it, whose gas are you buying? Qatari gas or American gas? And you look at the European numbers since the Russian-Ukrainian war and the trends that continue there, there's a lot more room to grow. There's a lot more room to push the Europeans to get off of Russian gas immediately and get onto American gas. It's the right thing to do. When you think about our Indo-Pacific partners, Taiwan, but others as well, their needs, what China might try to do to them in conflict zone.

DUBOWITZ: Look at Japan. I mean, Japan is a major importer of all its energy, like 98% of Japanese oil and natural gas, right?

GOLDBERG: This is why we're so focused on building the Alaska Natural Gas Pipeline and selling as much to our Indo-Pacific partners as possible, helping Taiwan stockpile as much natural gas, all of that. So I just want to really foot stomp the natural gas piece. The last piece is actually the after-action report from the 12-Day War and thinking about new possibilities for energy flows in the region. I think it's an opportunity for us to say, okay, the Iranians, they're still there. They still have missiles, they still have fast boats, they still have mines. They might at some point still mess around with



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the Strait of Hormuz. They might do something else. What are the other ways we could think about the export of oil in the region?

Why do we have to always go through this hocus-pocus with them in this frenzy of like, oh my God, what's going to happen to oil? What's going to happen if they shut down the Strait of Hormuz? Let's really look at the East-West Pipeline that the Saudis have already built. That takes Saudi oil from Aramco, from the Gulf all the way to the Red Sea. Where can it go from there? Yeah, you could load onto cargo there and go up to Suez, but what if it goes up by pipeline? What if it goes up across Jordan, across Israel, right to the Eastern Mediterranean? Fully safe outside the range of Iran, not down by the Red Sea areas where the Houthis remain potential to impact flows of cargo.

DUBOWITZ: Connect the Mediterranean to Southern Europe.

GOLDBERG: Yeah.

DUBOWITZ: Maybe into central, even Western Europe.

GOLDBERG: Now you have a complete corridor for oil flow up to Europe. Who is the lost soul here? Who's—

DUBOWITZ: Khamenei and their Islamic Republic.

GOLDBERG: Sure. And the Chinese.

DUBOWITZ: And the Chinese, right.

GOLDBERG: And the Chinese, by the way. Now, they're really the only ones impacted by the Iranians deciding to do something bad here. And then we tell the Indians, "Hey, buy more oil from the United States. We're open for business." And the Chinese want to buy more oil here too. That would be fine. President would like that.

DUBOWITZ: I mean, that's fascinating, that connectivity, because you're right, Hormuz has always been — I mean, dating back to the Islamic Revolution and the Carter era, Hormuz has always been that choke point. Talk about having them where we have them by the throat, they've had us by the throat because of Hormuz and a Hormuz crisis, and the necessity of the U.S. Navy having to keep that open. And again, as you said, what's happened with the Houthis. I mean, our ability to actually bypass all of that, and get oil flowing, and then natural gas flowing to our partners gives America an incredibly strong position as we head into the 21st Century in this competition, or, certainly, in some respects, a war with its Axis of Aggressors from Beijing, Tehran, Moscow, and Pyongyang.

If energy dominance becomes an instrument of American national power America is much stronger in this competition.

GOLDBERG: And what if Iraq becomes our energy partner? Not Iran's energy partner. We actually push Baghdad to end its reliance on Iran once and for all, we put pressure to get rid of the Iranian militias, disarm them, disband them. We stop the attacks on existing oil infrastructure in northern Iraq. We help the Iraqis explore the rest of their energy infrastructure potential, which is substantial. And you see additional flows coming out to Europe via northern Iraq. Right?

And American oil companies, American, but not just the big folks, I'm talking midsize, can do well, and can develop new partnerships, new ideas, new pipelines, all of this. It would be a game-changer. Once again, you will force Iran out of Iraq, if you focus on it from the energy lens, and pry Iran's hands out of the energy sector and out of the financial sector while also disarming the militias that threaten both the energy and financial sectors of Iraq, make it an actual U.S. partner, get our ROI finally out of this partnership of so many years that so much sweat, blood, treasure has been poured into by the American soldier, and the American taxpayer. Game-changer, again.

And now Iran's fallen back within its borders. To me, Iraq is the Alamo at this point. I truly believe that. Gaza has fallen.



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DUBOWITZ: It's the Alamo for the Islamic Republic.

GOLDBERG: It's the Alamo. Gaza has fallen. Lebanon has pretty much fallen. Still in play maybe. Hezbollah is not what it was. Lebanon has fallen. Because of that Assad fell. Syria has fallen. The Houthis, TBD.

DUBOWITZ: Yeah. The Israelis are taking out their leadership.

GOLDBERG: But it's developing.

DUBOWITZ: Yeah.

GOLDBERG: And there's a lot of interesting options down there, and it's not on their border to be able to just drive across and send a shipment. It takes a long time, and if you're focused you can intercept a lot of what they try to do.

So, where have they fallen back to? Baghdad. That has to be the focus. And we can do it through a lens of energy.

DUBOWITZ: Yeah. That's fascinating. Yeah. I've been hearing in the region a lot of concern about Baghdad and the Khamenei-backed militias there, because they've been somewhat quiet since October 7th. But—

GOLDBERG: Well, until they started seeing northern Iraqi oil production coming back online, and deals being cut with the KRG [Kurdistan Regional Government], and then they started firing their rockets and drones at American—

DUBOWITZ: At American. Yeah.

GOLDBERG: —international oil companies there—

DUBOWITZ: Right.

GOLDBERG: —trying to shut down all production, which they achieved short-term. But the bad news for them is don't mess around with energy. Don't mess around with American energy dominance in this administration. You get the attention of pretty high-level people pretty fast. And I commend Secretary Rubio, the president, everybody else for what appears to be really fast attention on this, pressure on Baghdad, and I hope a process that continues to unfold where we actually do follow through for Iraq's benefit, by the way, and ours to pry Iran's hands out of Baghdad.

DUBOWITZ: So, Rich, I want to end with this, because I think — I've enjoyed this conversation, first of all, because there's a lot of good news in this story of American energy dominance, and there's, certainly, been a lot of good news in the US and Israel effort against the Axis of Misery that Khamenei built, and the nuclear weapons program that you, and FDD, and all the rest have spent so many years trying to counter.

But there's part of me that thinks this ain't over, and that we're heading to another round, and that there may be another major confrontation between the Islamic Republic and Israel in the coming months, maybe shorter, maybe longer, because Khamenei is going to, or is already involved in trying to reconstitute. Right? His missile program, his nuclear program, his axis.

And so, we're not finished with this, and I try to caution lots of our friends and colleagues here, and in other places that this isn't over. This isn't time to pop the champagne, and celebrate.

First of all, the regime remains standing, and this ain't over until the regime goes down. And that's been a longstanding theme of FDD is just to work at bringing down the Islamic Republic. And second is preparing for that next military confrontation that I think is coming. Any thoughts on that? Do you agree? Disagree? I hope you disagree with me, because I'd, certainly, like to hear another counter voice on the fact that I think there's going to be another round. Parting thoughts? Parting insights?



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GOLDBERG: I have two. One is, specifically, on that question, and one is more macro on the way forward. So, it's positive and negative. One is you go back to a year ago, last summer, over a year ago, I wrote a paper, a summer paper for the Reagan Institute. It was a response to our good friend Mike Singh, who had his own initial paper, I responded to it, and I used it to, basically, lay out, "If Donald Trump wins the election, this should be his Middle East approach" in the context of great power, competition, all of the reasons why the Middle East threatens us in the Western Hemisphere from a China, from a Russia perspective, et cetera.

And the primary diagnosis was we're no longer in a deter, pressure, containment, whatever, rollback. It's very simple. Remove the threat, the existential threat, and pressure the regime, because the extortion potential, the nuclear extortion, itself, is what bogged us down, is what didn't allow us to be flexible, is what always constrained our options, is what always captured our imagination in a very bad way of, "Oh my gosh. What could happen if we do this or this or this or this?"

Obviously, on steroids during the Biden administration. Like, the snapback of UN sanctions that's ongoing right now? Couldn't do it. They could go nuclear. They could go to 90%. They're threatening it.

DUBOWITZ: Yeah. We were paralyzed by the blackmail.

GOLDBERG: We were totally paralyzed.

DUBOWITZ: Right.

GOLDBERG: And then the minute that there's actually conflict, because they know you're paralyzed, you have to distract yourself, and actually fight militias, and fight the tentacles instead of the octopus.

Remove the threat. We've done that now. Remove the existential threat, I should say.

DUBOWITZ: Which is, by the way, it's worth emphasizing—

GOLDBERG: But it doesn't mean remove the threat, and then go to good times.

DUBOWITZ: Right.

GOLDBERG: It means this is still a maniacal—

DUBOWITZ: Right.

GOLDBERG: —radical, anti-American, crazy country, or regime with a lot of pro-American people in the country, of course, that wants to reach out and touch us in any way possible to still hurt us. You don't respond to that with sanctions relief. Now you actually have more confidence in sanctions pressure, and being able to go into Iraq and say, "They can't hurt us, and we won't let them hurt you. So, here's what we need you to do."

And you do this in different areas. And say to the Israelis, "Okay. They still have missiles, and we don't need to fight this fight anymore. We've done the big existential piece that you needed our help on with B-2s." A lot of this can be done by Israel going forward. We'll support you in that. You're the aircraft carrier democracy. We've made an investment. We're getting a lot of ROI already. We might get more ROI in the future. We'll work together on intelligence, see what's going on. What does the threat look like? How many missiles are left? Are they reconstituting? How does that work? How are we going to stop that?

So, yes. My second insight is, yes, it is possible there will need to be a round two in the future, but the dynamic has changed. The paradigm has changed. Our force posture changes throughout all of that. We need to watch it. We can't



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allow it to reconstitute. The president's policy is no reconstitution. I think the snapback of sanctions is important to align with that no reconstitution policy, because snapback, ultimately, we've always talked about as a return of sanctions, put more pressure on Iran.

At this point, post-12 Day War, the snapback is to actually say, "No enrichment. No reprocessing. No nuclear-capable missiles," which is no reconstitution of what was just destroyed.

DUBOWITZ: Right. And if you try to help the Islamic Republic do that –

GOLDBERG: Exactly.

DUBOWITZ: – by the way –

GOLDBERG: You should be threatened as well–

DUBOWITZ: – Beijing, you're in violation of–

GOLDBERG: Exactly.

DUBOWITZ: – six UN Security Council resolutions. Right.

GOLDBERG: So, my bottom line is from a national security strategy perspective, we have opened up a lot more ideas, more creativity, more flexibility in how we would go about the threat ourselves, how we would support allies or partners encountering the threat in its different aspects, our force posture, both in the region and abroad, our ability to focus on even greater threats to our national security, all of that.

But in the end, they still have a lot of missiles. They're still dangerous. We saw what they could do. Clearly, the Israelis, the Americans, everybody needs to reload. Went through a lot of interceptors. We don't know how many anybody has left, but went through a lot of interceptors. We can't allow the Iranians to reconstitute and build more offensive capability. So, anything you can do to prevent that in the interim while you're reloading your interceptor capability.

Because if there is a round two, if the Israelis were to go back for more raids, going after whatever they didn't get before, you should expect that missiles will go back off against Israel, which means you're going to need Aero-Interceptors, you're going to need to THAAD interceptors, you might need more SM3s off the coast. All of that might happen one day. You've got to reload.

So, big mission accomplished for the existential threat for now. You need to continue to have sanctions pressure, rollback, now go into areas where you have flexibility, and execute to really roll that regime back within its borders.

And I think if we execute correctly on all these fronts, this regime is not long for this world.

DUBOWITZ: Yeah.

GOLDBERG: This is a game-changer totally.

DUBOWITZ: Yeah. And that is the great hope of the Iranian people, great hope of FDD, great hope of this podcast, that this regime will end up in the ash heap of history along with other failed brutal dictatorships.

Rich, thank you. Really incredible insights again. Great to have you back. We will have you back again, because I feel like every time we have you back, you predict what's going to happen, and things work out well.

And thank you for the insight. I think that the area of energy, the contribution on this national energy dominance issue, and council, and program at FDD is a critical element of our fight, not only against the Islamic Republic of Iran, but the



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Chinese Communist Party, Putin's Russia, certainly, our enemies in Latin America, and it's good to have an administration that appreciates that, and is unleashing American energy against our enemies, and in support of our allies and partners. So, Rich, thanks. Thanks for your service, and welcome back to FDD. Great to have you back.

GOLDBERG: It's great to be back.

DUBOWITZ: The 12-Day War showed the world what U.S. and Israeli power can accomplish together, critically setting back Iran's nuclear and ballistic missile programs and proving that deterrence is not dead. Israel's strike in Qatar shattered the myth of safe havens for Hamas terrorists. And America's energy dominance is now a weapon, strengthening our allies, weakening our adversaries, and ensuring we're no longer hostage to the oil blackmail from the Islamic Republic of Iran. But this fight isn't over. Tehran will try to reconstitute. The next round is coming. Our mission now is to keep the pressure on, deny the regime its lifeline, and push it even closer to the ash heap of history. I'm Mark Dubowitz. This has been "The Iran Breakdown." Until next time.