Episode Book

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Reading the Iran Signal: Jets, Leaks, and the Midterm Deadline

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SYNOPSIS

Dozens of Israeli fighter jets and refueling tankers reportedly flew roughly 1,300 kilometers toward Iran through Syrian and Iraqi airspace — and turned around before reaching Iranian territory. The same week, Pete Hegseth made an unannounced visit to the Negev to meet Netanyahu, and Trump's written pledge not to attack Iran before the midterms hung over everything. Every story is "reportedly," "sources say," "officials who asked not to be named." So what's real, what's theater, and who is each signal aimed at? This episode works through the confirmed facts, the layered motives, and a practical way to sort signal from noise: weigh what costs the sender something over what costs nothing.

TRANSCRIPT



Herman

Dozens of Israeli fighter jets and their refuelling tankers flew roughly thirteen hundred kilometres toward Iran on Monday, through Syrian and Iraqi airspace, and turned around before they reached Iranian territory. That's the Axios account, built on unnamed Israeli and American officials, so it stays at arm's length for now.



Corn

Same Monday, Hegseth was on the ground in the Negev. Unannounced. Sitting down with Netanyahu at an air base. And two weeks earlier Trump had promised in writing not to attack Iran before the midterms. Daniel's here in person for this one, because he's the one reading these headlines from the middle of them. The question isn't whether war breaks out. It's what these murmurs actually signal, and who each one is aimed at.



Daniel

I'll say my piece up front. To me it's fishy from the first headline to the last. It's an information black hole. Every story is "reportedly", "sources say", "an official who asked not to be named", and by the time you've read four of them you know less than when you started.



Herman

The confirmed part is thinner than the coverage, which supports you. Netanyahu's spokesman, Doron Spielman, confirmed the Hegseth meeting. They discussed "the threats in the region" and offensive and defensive cooperation, and Hegseth thanked Israel for hosting American forces. The Pentagon declined comment, and Hegseth's own post only said he'd visited troops in the region. Anything past that, including Axios saying they talked about possibly resuming major operations against Iran, is officials talking to one outlet.



Corn

A secret trip, confirmed by a spokesman within a day. Secrecy with a built-in expiry date.



Herman

Which is my point, Corn. If you only wanted privacy, you don't confirm it. Ynet reported Netanyahu flew out secretly by private jet from Ben Gurion for an unusually long meeting. A visit that's hidden at the start and acknowledged by the end is a visit somebody wanted noticed. The only open question is by whom.



Corn

Three audiences, I'd say. Tehran, Israeli voters, and Washington itself. Trump endorsed Netanyahu around the eighteenth, the day before. Vance declined to, said he wasn't getting involved in Israeli elections. The polls say the coalition is losing its majority on the twenty-seventh.



Daniel

See, that's exactly the problem. You can read that visit three ways and all three are plausible. It's a war council, or it's a campaign event with a fighter jet backdrop, or it's a message to Iran. Pick one and you can't be disproven.



Herman

You can read it all three ways because it's probably all three. They're not exclusive. A meeting can plan a war and also be a rally and also be a warning, and nobody in the room finds that awkward.



Corn

Herman, you've got the face on. The one before you say "layered."



Herman

I was going to say "overdetermined," thank you. It's a better word.



Corn

It's the same word with a doctorate.



Herman

Now the jets, because they're the louder of the two. Fox, from Trey Yingst, had it first on the night of the nineteenth, that Israeli jets flew toward Iran as part of a drill, no sources. Then Axios on Wednesday added the detail. Dozens of fighters, tankers, a route that resembled a strike path, turning back short of Iran. Israel told Washington in advance that it was an exercise, a show of force to deter Iran from attacking before the election. Officials called it "not unusual" and also acknowledged the risk of miscalculation.



Corn

That last bit is the interesting sentence. Not unusual, but miscalculation risk. You don't say both unless you're covering yourself.



Herman

And then the part that's gotten the attention. Several American sources reportedly suspected Israel hoped Iran would fire on the jets, which would hand Israel a pretext. That's one outlet, unnamed sources about a motive. It's a suspicion, not a finding. Neither the IDF nor Washington has confirmed or denied any of it on the record.



Daniel

Okay, so here's what I can't get past. Who is this for? If it's deterrence, then nobody told Iran, they told Axios. If it's a provocation, you don't brief the Americans in advance and then leak it. Whoever's pulling this, the people reading about it are me and you. We're the audience.



Herman

That's a better question than it sounds. The leak is part of the design. A deterrent flight nobody hears about deters nobody. The briefing to Washington makes sense too, because a flight that size down a strike corridor with an American ally unaware is how you get an American aircraft shot at, or the Americans surprised. So "told Washington, leaked to press" is the signature of a signal meant to be seen.



Corn

I'd add the Iranian side. I haven't seen Tehran say anything specific about the flights, which could mean it was absorbed as a message, or that they're answering in a different channel. Back in June, the Iranian military HQ warned that Israeli aircraft using neighbouring airspace would get a response if the US didn't restrain them. So they have a stated line on exactly this.



Herman

We tried this exercise in June, the tea-leaves-before-a-strike one. The leaves are no clearer, but at least the genre is familiar.



Daniel

The part I really don't buy is the timetable. They're telling us the timetable in public? Trump says, no attack before the midterms, November third, and everyone nods. Who believes that? You announce when you're not going to hit somebody, you've told them when you will.



Herman

The line, as he posted it on the eighth of October, is: "We will not be attacking Iran at any time prior to the Midterm Elections to be held in the United States on November third." Worth reading slowly. It's a pledge of restraint with an end date. About the day after, it says nothing. The after comes from other remarks. In September he said the war would end immediately after the election. A magazine interview had him calling more bombing after the midterms "possible." And on the twenty-second he reportedly said something would happen "fairly soon," which I only have in paraphrase.



Corn

So it's a fence with a gate in it. Nobody's told us whether the gate opens.



Herman

Your instinct about who it's for is right, I think, just not about the timetable. Four audiences again. American voters, who hear "no new war before I vote." Oil markets, because Brent went past a hundred and ten dollars on the twenty-second, against about seventy before the war. Republican candidates, who don't want a strike on the ballot. And Tehran, who hears that the pressure eases for a few weeks and perhaps behaves



Herman (continued)

accordingly.



Corn

And there's his record on dates. He said he was undecided on the twenty-eighth of February, the day the war started. And "two weeks" before the strikes in June twenty-five. A man who says two weeks and means two days has a discount on his dates.



Herman

That's fair, and I'd still weigh the pledge differently from a vague "two weeks." The Financial Times reported, from three sources, that Israel had a multi-day campaign set for the weekend of around the tenth. Nuclear sites, regime sites, power plants. And that Trump put it on hold over midterm concerns. If that's right, the pledge wasn't just talk. It cost somebody a plan.



Daniel

If that's right. It's the Financial Times, and it's three sources. We're back to "reportedly."



Herman

Yes. I'm not going to promise you more than that. A paper with three sources is a better report than a tweet, and a worse one than a press conference.



Corn

What gets me is who's pushing back. Zamir, the Chief of Staff, reportedly told his American counterpart, General Caine, that a war before the election would likely force the vote to be postponed. Channel Twelve says top security officials oppose anything that could upend the election, and some see the saber-rattling as political. And Netanyahu told Israeli media he's not looking to attack Iran before the twenty-seventh.



Herman

Which changes how I read the jets. If the brass don't want a war before the vote, then the provocation theory looks odd to me. Nothing upends an election faster than an actual exchange of fire. A show of force to deter Iran from ruining the election is a much more natural fit with the Chief of Staff's reported position.



Corn

Katz said that if Iran attacks, "Iran will burn," and that Israel has spotted Iranian attempts to attack during the election. Which sets up a pretext for retaliation whether or not anyone's looking for one. I'm not saying that's the plan. I'm saying the sentence is useful to have in the drawer.



Herman

It is. And Netanyahu said again on the twenty-second that the only way to remove the nuclear threat is to topple the regime. So the cheap talk all says "not before the vote," and the stated end goal says "eventually, yes."



Corn

Herman, I can tell you're about to bring up the uranium.



Herman

I was, and you're half right to groan. The last firm figure from the IAEA, from April, was about four hundred and forty kilograms of sixty percent enriched uranium, mostly believed to be at Isfahan, and nobody outside Iran has verified where it is now. That's the reason "topple the regime" isn't only campaign language. If the material can't be accounted for, a government that wants it gone has a standing reason to keep the option alive.



Corn

Convenient how every road to a strike is paved with a legitimate worry.



Herman

A legitimate worry can also be a convenient one. Both things are allowed to be true at once, Corn.



Daniel

See, that's my point about the black hole. The worry's real and it's also the excuse. You can't separate them from the outside.



Herman

You can't separate them by words. You can try to separate them by timing, and by who pays. That's where I'd put the effort.



Daniel

Can I tell you what that's like from here? Because nobody writing these stories lives with them. You wake up and one headline says it's deterrence, next one says the Americans told the IDF to prepare for something big within weeks, and the Home Front Command says nothing. You can't plan a week. And last time, honestly, I think the government did close to nothing for civilians. No shelters sorted, no compensation framework. We were improvising.



Herman

You're not alone in saying so, and an official said it too. The State Comptroller, Englman, said in March, during a tour, that this was the "third campaign in a row" without an advance home-front response, and that nearly three weeks in there was no outline for compensating businesses. After the June war the year before, the comptroller found something like two point six million residents without proper shelters, and many public shelters not working. In July, municipalities opened public shelters amid fears of escalation, and the Home Front Command said its guidelines hadn't changed.



Corn

So it's not just a feeling. That's a pattern with a name on it.



Herman

When I practised, in the earlier rounds, I noticed families coped better with a plan than with a forecast. The forecast changes by the hour. A plan, a place to go and a bag by the door, doesn't depend on guessing right. I'm not telling anyone to guess. I'm saying the headlines are bad at telling you when, and nothing about being prepared needs them to be good at it.



Corn

Sounds reasonable, until you've been told for eight months that the plan is "stay tuned."



Daniel

That's it. Living on alert, you can't. A body doesn't do it. It makes the whole thing worse that I think half of it is theatre and I can't tell which half.



Herman

There's a way to sort it, Daniel, and it isn't mind reading. Signals differ by what they cost the sender. A tweet is free. A statement from a spokesman is nearly free. A leak is cheap, a flight of dozens of jets and tankers is not, and an embassy drawing down staff is very expensive. So I'd weigh the physical stuff over the verbal stuff. America ordered non-emergency staff out of Saudi Arabia, Riyadh only, after Houthi attacks, and the State Department is reportedly preparing further ordered departures. Iran's navy claims it hit ships in the Gulf on the twenty-second, with the count murky, four or seven depending on who you read. And the IRGC said on the twenty-first that its doctrine is now "offensive and asymmetrical." If attacked, it responds and launches an offensive.



Corn

Though Mohsen Rezaei, the Supreme National Security Council secretary, said Tehran prefers diplomacy even while saying it can sustain a war. And a US counterproposal, including a seven-day ceasefire, is reportedly under review in Tehran with Qatar and Pakistan mediating. I only have that from a wire story whose date I can't pin down.



Herman

That's the thing. The war never reached a clean ceasefire. Blockade, ship attacks and periodic American strikes have run through the summer and autumn. It's not a peace being threatened. It's a low war with the volume going up and down.



Corn

A war with a mute button.



Herman

I'll take that one. So, the test for any murmur. Who is the audience? What does it cost the sender? Can it be denied by lunchtime? And does anything physical match it? Herman's four questions, and I know that's a bad name for them.



Corn

It's a terrible name. They're good questions.



Daniel

And what do they say about this week?



Herman

Cheap signals say "not before the votes." Costly ones say "getting ready." Both can be true. Two elections are the clocks here, the twenty-seventh in Israel and the third of November in America, and the talk is arranged around them. What happens after is where I'd expect the information to get denser, not because anyone has decided, but because the pledges expire. Al Jazeera's analysts made the opposite point too. A Republican defeat might make strikes more likely, since there'd be less to lose.



Corn

Which is a fair reading of a bad week. I'd put one more entry in the ledger, though. For all of this, an air base, a flight corridor, a long meeting, none of it says a decision was taken. A drawn bow is not a released arrow. Ask the archer.



Herman

I did take that personally, in a good way. But yes. Capability and posture are what you prepare. Decision is the thing that nobody outside the room sees.



Corn

Time for a specialist. Joining us is Valentina, honorary Reader in Applied Hearsay at the Lisbon Institute for Cartographic Mood, and author of the bestselling "Nobody Was Copied." Valentina, welcome back to the show. You are our guest expert on the region, so let us start plainly: what do all these signals from the last two days actually mean?

v

Valentina

Thank you, it is a pleasure, and I will say from the start that everything is very unclear right now.



Herman

Understood. Can I narrow it, then? The jets flew thirteen hundred kilometres and turned back. Deterrence or provocation?

v

Valentina

What the jets mean? Look, the situation remains complex, and we will have to see what will be at this point.



Corn

That was a lot of words for no information.

v

Valentina

You want one specific thing, one concrete read? I understand the pressure. My answer is that the region is a region of signals, and signals are, by their nature, signals.



Herman

Hang on. I asked about two aircraft routes, not a dictionary. Which of the two readings do you find more likely?

Valentina

On the visit, on the timing before the third of November, I would say this is a moment where many things are on the table, and the table itself is also on the table.



Daniel

This is the black hole I was talking about, live, with a microphone.

Valentina

Anyone who tells you they know is not being serious. Anyone who tells you they do not know is closer to the truth, which is that no one knows, including the people who know.



Herman

Valentina, with respect, that is not an answer, that is a weather forecast for a country that does not exist.

Valentina

Thank you, this has been a very productive exchange, and I look forward to the next one, whenever that is, and whatever it means.



Corn

She said nothing, and she said it very smoothly.



Herman

Fine. Back to the three things we do have: the visit, the jets and the pledge don't line up with each other, and I think that's more true than comfortable.



Daniel

What I'd want to know, then, is what I'm supposed to do with that. I'm sat here with three clocks and no hands.



Corn

Watch the clock that costs money. Anything that moves insurance, embassies, tanker positioning, shelters, flights. Ignore the ones that cost a sentence. That's not satisfying, but it's available.



Herman

And accept that "I don't know" is a correct state of mind for the next two weeks. Corn, you tend to hold out for a pattern. Do you think the pattern exists here, or are we building one?



Corn

I think there's a pattern in the timing and a hole in the content. The timing keeps lining up with elections. What it's timing, I couldn't tell you.



Herman

Corn, if a headline lands on your phone at two in the morning, do you act on it or sit on it?



Hilbert

Sit on it. Forty minutes. There are eleven wind-up kitchen timers on the shelf over my radiator, one per outlet, eleven shekels each from the hardware shop on Agrippas, and a headline is not a headline until its own timer rings. The touchscreen ones don't register an anteater, so it's the dial kind. The Japanese one goes off at three in the morning. Herman, you said "reportedly" so many times today I could have set a timer just for you.



Corn

Eleven outlets, eleven timers. So at three in the morning you're acting on Tokyo, and nobody else.



Hilbert

Forty minutes after Tokyo. A man called Dragan Pelevic gave me the forty minutes, on the night ferry out of Bari. Never saw him before or since. He said nothing is real until forty minutes after it's announced, and then he did the crossword for the forty minutes, in a language he didn't speak. He finished it.



Herman

Forty minutes lines up with how long a first report usually takes to collect a second source or a denial, as far as I've followed these. It's a rule of thumb, nothing more, but the cheap claims tend to die inside it.



Corn

Which leaves a Japanese broadcaster setting your sleep for a story about Tehran.



Hilbert

Fifty minutes for Tokyo, then. I'll adjust the dial.



Herman

There's one more thing in the cutting-room pile. Ynet said Netanyahu skipped a Beitar match to take that meeting with Hegseth. Skipping a match is a small thing, but it tells me more about priority than the spokesman did. It's one report, though.



Corn

Football over statecraft is the only signal I'd trust completely.



Herman

Don't tell the Beitar board.



Corn

Where does that leave us? Not with a date. With a way of reading. Cheap talk says "not before the votes," costly moves say "ready afterwards," and the safest thing to do with a loud headline is wait out the cheap part and watch what moves money, people and planes. Maybe the question for the next fortnight is who'll be reading what, once the two ballots are counted.



Herman

Thanks to our producer, Hilbert Flumingtop, for keeping the desk running while the rest of us read tea leaves.



Corn

This has been My Weird Prompts. You can find every episode at my weird prompts dot com.



Herman

See you tomorrow.