

Neocons In Defeat Denial, Trump Schizophrenia Getting Worse | Daniel Davis

The Ukraine Proxy-War is going from bad to worse for the NATO war coalition and the leadership knows it. Panik is setting but at the same time there is no strategy on how to confront the failing project, just Donald Trump's erratic way of saying one thing today, another tomorrow and a third one in the time between. How will Russia and China deal with this situation? In Istanbul, Daniel Davis joins Pascal Lottaz to examine what they describe as the contradictions driving American foreign policy. They discuss Trump's diplomacy with Iran, Russia and China, loyalty inside his administration, and competing influences on White House decisions. Davis challenges the idea that intelligence agencies independently control policy, while warning that NATO lacks the air defenses and industrial capacity for war with Russia. The conversation explores European escalation, diplomatic credibility, and the danger of a conventional conflict turning nuclear. Daniel's Links: YouTube: <https://www.youtube.com/@DanielDavisDeepDive> X: <https://x.com/DanielLDavis1> German: <https://www.youtube.com/@DanielDavisDeepDiveGermany> French: <https://www.youtube.com/@DanielDavisDeepDiveFrance> Italian: <https://www.youtube.com/@DanielDavisDeepDiveItalian> Spanish: <https://www.youtube.com/@DanielDavisDeepDiveSpanish> Russian: <https://www.youtube.com/@DanielDavisDeepDiveRussia> Portuguese: <https://www.youtube.com/@DanielDavisDeepDivePortuguese> Neutrality Studies Links: Neutrality Studies Substack: <https://pascallottaz.substack.com> Support Neutrality Studies: <https://neutralitystudies.com/donate> Neutrality Studies shop: <https://neutralitystudies.com/shop> Time Stamps 00:00 An Istanbul conversation with Daniel Davis 00:40 Trump's contradictory Iran policy 02:20 Diplomacy, trust and broken agreements 06:38 Loyalty and the people around Trump 11:53 Who shapes American foreign policy? 15:58 Russia, the CIA and diplomatic channels 19:34 Europe and the risk of escalation 22:45 Why Davis says NATO cannot win

#Pascal

Welcome back, everybody, to Neutrality Studies today with a very special episode, because I'm here in Istanbul with my friend and colleague Danny Davis. Danny, welcome. Always great to be here. Good to be in Istanbul too. Well, it was a fascinating couple of days with a good conference, I would say, and now we are getting prepared to go back to our normal lives and deal with the craziness that is international politics. Let me put it this way: what did you read about international politics today or yesterday? I mean, what's happening also in the United States, maybe the Xi-Trump meeting and so on, that somehow links up with what we discussed here at the conference. Is there anything that comes to mind?

#Daniel Davis

Well, one thing that just jumps straight out is President Trump gave almost like a Dr. Jekyll, Mr. Hyde—two separate interviews on the same day, the 27th. And on the one, he said that the Iranian side, that basically they had already lost militarily and everything's going fine. And the good news is they don't have any nuclear weapons program because they've already destroyed it. So it's no problem. Then hours later, he gets into another interview and says, well, you know, the bottom line is we have to make sure that there's no nuclear weapon. There can't be a nuclear weapon for Iran, and we're going to do whatever we have to. And I'm thinking, wait a minute, you just told me today there was no nuclear, but it's gone. And then later in the same day, he says, yeah, well, we got to make sure they don't. Well, which is it?

And if the Strait of Hormuz is open, and if you're getting more oil out now than pre-war, he says—he says—so I don't know how you say that there's been this, now what is it, eight-month war, all this stuff destroyed and the dueling blockades, but then more came out than even before the war. I don't know how that's physically possible, but yet that's the claim. And when you look at those kinds of things, you have to think, what planet are we living on? How do you do foreign policy? How do you make good analysis and say, all right, here's what I think we should do. Here's what they're doing. Here's what the experts are saying. But this, I think, will work when you have someone potentially—and you're saying it—irrational at the top that can't make rational decisions, or even remember from one speech to the next what he said and what he believes the conditions are? It's tough.

#Pascal

It is very tough, and I mean, we discussed this also in the conference, right? And you actually made the point that in order to have kind of a stable international environment, what we would wish for is actually a grown-up dialogue between these different partners, right? And I must say, though, you know, the way that Donald Trump welcomed Xi Jinping, going himself to the airport, I mean, funnily enough, one of the things you see is that he tries to treat Xi and also Vladimir Putin, you know, on a personal level, apparently quite okay. But then what does that mean for international politics if then, you know, the policy decisions become erratic, especially towards second-tier powers, let's say like Iran, which still can cause all of that havoc in the international scene.

#Daniel Davis

Well, I mean, it's a different version of the Jekyll and Hyde situation. So you have—what was it? I think May or so of 2025—President Trump meets with President Putin in Anchorage, Alaska. And the pomp and circumstance, red carpet, all kinds of optimism literally comes to nothing. According to the Russians, anyway, Trump agrees to all kinds of things. They're happy that we can bring the war to an end. And then none of them materialize. He doesn't follow through with any. He doesn't require

the Ukraine side to do any of their stuff. And then the thing just falls apart. Now, here he comes with Xi Jinping, and he's done this before, where he has another pomp and circumstance. He goes out to the airport, looks good on a surface level. Great. He's taking care of that.

That's good. That's him showing seriousness with diplomacy, is personally going out. Very rare for him to go to the airport. You need somebody, et cetera. Usually he's at the Oval Office. Sometimes he meets them coming in. That's about it. But then he's done that in the past, and then it turns into nothing again. And then it goes back afterwards, and he starts saying all this bad stuff about China, and they're cheating, they're ripping us off, and I'm going to throw more tariffs on it. How can anyone do business with the United States? How can Xi Jinping, how can Donald Trump, how can Erdogan, how can the current Ayatollah, how can anybody deal with this when you don't know from minute to minute what his position is going to be?

#Pascal

That is true. That is true. And it's a huge problem. You cannot do diplomacy. And that's why I guess the Russians came also to the conclusion, just like the Iranians, that the Americans are structurally incapable of doing agreements, agreement-incapable. Because even if you do an agreement like the Iranians did with the MOU, which—it's only an MOU, you know, this was not a treaty, it was an MOU—but it was that.

It was a roadway toward, you know, winding everything down and getting back to a civilized international, you know, relationship, right? And he threw it out of the window, like basically just the second he signed it, which then also explained to me why he signed it, because it was kind of a declaration of surrender. I think you also said that on your channel. Yeah. But in his mind, it didn't matter. Whatever, I could sign a piece of toilet paper, right? It doesn't matter. I do whatever I want to have the word anyhow. If it gets me a little bit closer to what I want, which is maybe just a little bit of a pause, and then I can try something else, then that's fine. I mean, it's inconsequential, at least it seems to me, to him and his administration. Well, see, here's the additional problem.

#Daniel Davis

On the MOU, for example, when he signed that thing and he had that big press conference right afterwards where he explained his reasons were—his reasons were rational. They were logical. Yeah, well, I can't go on. Our Strategic Petroleum Reserve was running really low, and in four weeks it could be beyond critical level. It's gone below that now. He said, "I don't want to be President Hoover. I don't want to be the one to preside over a global depression. I don't want to be the one." Wise thing to say. Valid.

And then he threw all that out the window within, I think it was five days, is when we established this southern corridor in the Omani corridor in the Strait of Hormuz, which was completely outside of the scope of paragraph five of the MOU. We never even tried to get Israel to abide by paragraph

one of the MOU. And the only thing that we did periodically, or for a little while, was drop the energy sanctions on Iran for seven, eight days, something like that. And then we put it back in. We never did any of the other stuff. And so the whole thing went out. But on that day, he sounded rational and his logic was sound. But then he just ignored it, went back. And now you see, as of the 27th, he's back again to just saying stuff in the same day that's contradictory.

#Pascal

Do you think that it's just, like, the way that Donald Trump works, or is it actually, you know, more the entire government system at the moment that is unpredictable because you never know which side of the foreign policy crowd actually gets the say? I mean, because even in his administration, he has J.D. Vance in there, who has a foreign policy stance which is not completely out of domination of everybody else. I would say Vance is not a neocon, but at the same time, he also has Rubio in there, right? I mean, even within the cabinet itself, there's this kind of Dr. Jekyll and Mr. Hyde kind of situation going on. Yeah, here's the problem.

#Daniel Davis

In his first administration, he did—number one, it's now very clear—he did not actually expect to win. So he didn't put much effort at all into forming a mental cabinet before he got in there and getting people vetted and everything like that. He was caught off guard. So now he had to just grab whoever he could in the couple of months before he took over. And so he just got guys who were basically already in the system. And that turned out to be, for him, a lot of problems. A lot of people pushed back, a lot of people undercutting, that he perceived, and many of us did, as a bad thing.

But in retrospect, that was not necessarily a bad thing at all, because these were people that were focused on doing the job. And when President Trump said he wanted to do something that was irrational, illogical, or counterproductive, they told him so and they pushed back, and then ended up leaving. To solve that problem in the intervening time during the 2020 to 2024 period, now he expected to win. And so they put a lot of effort. And I know many of the people on that team for years prior were putting in lots of effort. The result is they got nearly everybody in there whose number one priority was loyalty to Trump.

#Pascal

Yeah. Secondarily, if they had skills.

#Daniel Davis

And I'm not joking at all on that. So that means that across the board, he got people who were loyal to a fault, and they would never challenge him. They would never push back, or at least rarely. And especially among the key ones, never. Whatever the boss is, that's what we're going to do. If he

says, "Tell everybody that I'm holding a small nuclear weapon in my hand," yes, then I'm holding a small nuclear weapon in my hand because that's what he told me to say. And they'll say it with conviction. And so now then you have a case where you really need somebody on the inside to say, "Mr. President, that can't work. This is going to harm us. We cannot do that," and to be willing to walk out the door if he says, "I'm going to go do it," because you say, "Listen, I'm not going to harm our country, and my loyalty is just oath to the office of the Constitution, not to you personally." That doesn't exist, and we're paying the price for that.

#Pascal

Because there was quite a bit of a purge right before the Iran war started in their services, wasn't there? There were a couple of people thrown out and generals and admirals exchanged. Do you think that this filters now down also to the military realm? Is even the Pentagon now just full of yes-men that they kind of already were?

#Daniel Davis

So many of them were. And in fact, many of the purges, it appears—the evidence appears that it was more a case that this was kind of Hegseth's personal vendetta: "I'm looking for woke generals or people who were, or two DEIs," he called them, et cetera. And, you know, they were not sufficiently loyal. But some of them, it appears—and one of them in particular in Southern Command—it appears that they would not do what the Secretary of War said, especially in killing people in boats that we accused of being drug runners, which is not a capital offense, and yet we're killing them anyway. Apparently, he wouldn't do that.

#Pascal

Even if they were, because they never showed proof that they actually were.

#Daniel Davis

Well, every way you can look, there was none. There is no law that allows you to do that, and there was no due process, all that kind of stuff. Apparently, he pushed back on that, and so they said, either you get on board or get out, and he got out. Unfortunately, though, he didn't come out and say something afterwards. So once he retired, he didn't come out and tell us why. So you may say, yeah, he had some morals there if that was the case, but we don't know. All we know is somebody else spoke up, and they did conduct those executions.

#Pascal

So what do you think, what kind of options are there left? Because one of the facts is also that the United States is there. It is still the largest, I would say, the biggest of the great powers, right? It is

a superpower. And now the policy process is utterly irrational, and you cannot bank on anything. I mean, even we in this analysis space, right, we're constantly trying to somehow read sense into something that is maybe just inherently senseless. How do you think people will work with that?

#Daniel Davis

I mean, we're seeing it right now, especially on the other global actor stage. They're just doing the best they can. I think a lot of people are going, "Let's just placate Trump as much as we can without surrendering any of our national interests to the extent that we can, and just get to the other side of Trump." Because America is still going to be there. He's only got a couple more years, if he lives that long. And there's the question about whether his health is going to do it. But I think that that's what they're going to do.

#Pascal

They've got to get to the other side. What do you make of Brian Berletic's argument, you know, who is maybe the most forceful voice in our space today, to say, like, look, this is all just smoke and mirrors, actually. The foreign policy of the United States is set basically by the conglomeration of, like, think tanks and the military-industrial complex and, you know, State Department and War Department and so on, which, like, sporadically meet, and then they write these policy papers. And what you find in the policy papers, and also in the Hudson Institute and whatnot—they're kind of—not the Hudson Institute, which one is the other one? The conservative think tank, the RAND Corporation reports, you know, that's the policy. And then people like Biden and Trump and so on, they just then more or less execute, in different forms and flavors, what already has been decided by the deep state. There's definitely some truth to that.

#Daniel Davis

But I wouldn't say they determine it. They influence it. Because even with Biden, he still had to make the call, and he still had to agree to it or not agree to it. With President Trump, it's the same thing. You have our national security policy that was published in the first year. A lot of it made sense. A lot of it was rational and logical. We're going to focus on our hemisphere. We're going to de-escalate in the Middle East, which obviously he went completely against. The paper itself was fine, but he went completely against it because there were others also in the same space of the Washington, D.C., inner circle—relative inner circle—they didn't want that.

They didn't like that. They wanted to go more involved, etc. And so it's this constant battle behind the scenes for President Trump's ear. And I've talked to people who've been in the room, and there are those voices. So there's not one voice, and then the rest of it's just, you know, for public consumption or whatever, because President Trump is erratic behind the scenes too, in some cases more so. So when you have one voice in his ear today, he listens to that. And then a different voice in the other ear tomorrow, he may listen to that. And then he may just say, "All right, vanish, you."

And somebody else may say, "Hey, Mr. President, don't listen to this voice over here. He's a bad guy." And so all of a sudden, this guy gets banished. I've talked to one of them specifically that got banished, and he never had a chance to go back in again. And so I know that's the case. And so, and that wasn't the case. I've talked to other people who worked for Trump in 2020, and they said it's not even the same human being because he used to listen to all the voices, and then he would decide who he was going to listen to. Now it's almost like he doesn't have the ability, and he just will just listen to somebody else and get the other voices out. So it's a big problem.

#Pascal

Yeah, and then you've got Netanyahu in the White House, and two or three days later you've got a war with Iran. Coincidentally, I'm sure there's no relation. He didn't whisper into his ear. No, he shouted, I think. That's a huge problem. That's a huge problem. Because again, I mean, it still doesn't go away. The United States, even if we bemoan that, and even if we say that that's like maybe the worst way of doing foreign policy, it is de facto another way of doing foreign policy, which is probably why... How do you think the Russians are going to deal with that? Probably that's one of the reasons why they just don't know: do the war, right? Because there's no other option.

#Daniel Davis

Yeah, and I think that even before we get to that one, to answer that first question, what are we going to do? It's going to take a strong leader, because none of these voices have power. They have influence. They have access. Okay, there's nothing wrong necessarily with access. I mean, I can sit there and I can say, "Yeah, shut up. I'm going to listen to you. But tomorrow I want to hear from you again because maybe I like what you have to say, because you have a good track record of having some things, whatever." And tomorrow I'll come in and listen again. But if you have a strong leader that has a moral compass and you have a strategic vision, then all these things are filtered through that, and you either reject them or accept them based on how it works today.

That's possible. We just haven't had one like that in a long time. I mean, even Obama came in, and look what he ran on in 2008, and how even he really changed a lot over the course of his eight years. So he kind of lost a lot of his firmness. So I think that's the case. Back to your other question about how especially the Russians view this, I think that you're seeing they're doing everything they can. Still, even with the failure of Anchorage, instead of just saying, "All right, that's it, we're done," they're still trying to talk to him. When they let Jared Kushner and Steve Witkoff come over a couple of weeks back, two or three weeks ago, I was really surprised at first because I'm like, "Why would you listen to those guys?"

Well, you wouldn't let them back in. But Putin himself opened the door to that by saying, "Sure, I'll talk to those guys." I mean, they have the presidency here, so it makes sense. He's like, "You don't have any diplomatic knowledge, but that's something we can exploit, by the way. And you do have

President Trump's ear. He'll listen to that." So they're like, "We'll see if we can get something done." Meanwhile, I think that their assumption is, I think this is across the board, the assumption is everything we're trying is going to fail, and we're going to have to solve our problems on our own with our own resources and hope that maybe President Trump can do something we want.

#Pascal

Alexander Mercouris and Alex Christoforou on their channels on The Duran are making the argument now that, you know, we did see something that we've seen recently right before Kushner and, what's his name, Kushner and Witkoff, right before they went to Moscow. A week earlier, there was the CIA director who went to Moscow, right? Ratcliffe. And then recently, actually, Ratcliffe met with Zelensky before Zelensky came to the U.S. to go to the General Assembly in New York, and he met with him in Ireland.

Now, this leads our colleagues from The Duran to kind of argue that the CIA director is now himself personally getting involved in trying to shape things—the war—because the CIA, it's their argument, is largely in charge now, much more even than the Pentagon, of how the implementation is being done, including information sharing, targeting, and so on. Do you buy that argument? Do you think that this was, again, Ratcliffe then trying to negotiate and basically lure the Russians into a ceasefire? How do you make sense of that?

#Daniel Davis

Yeah, I would doubt that's the case to that degree. And the CIA has a very long and sordid history of doing that kind of thing. So I think the assumption is that there is a degree of it. But this director of the CIA can't just on his own go and do any of these things without direct authority from the president. You just can't. So there is a limit to how far that can go. And I think that the more strong probability is that he was dispatched there because there's a core team inside the White House that figured out how all this stuff is going to go. It's an impromptu thing, supposed to go through the NSA, the Trump version of it or whatever. And they talk this stuff through, and then they'll say, "All right, let's send Rubio here. Let's send Ratcliffe there. Let's send Witkoff over here," et cetera. So they'll do all this. So they have a message internally that President Trump approves before they go. Because then you would have to have an independent actor, and I just don't see any evidence of that.

#Pascal

All right, all right. So your interpretation is, no, no, it's still all the strings that come together in the White House. It's not that we have institutions going and doing stuff on their own, like clandestinely.

#Daniel Davis

With the exception that once that string gets dispatched, that string can do stuff that they may not talk about at the beginning. So there may be some freelancing that they don't know about going on. But the dispatch, I think, is still on that string.

#Pascal

Why are they meeting with Zelensky in Ireland if Zelensky was on his way to the U.S. anyhow? Does that make any sense? It's weird.

#Daniel Davis

I got nothing on that. No idea. So many things don't make a lot of sense.

#Pascal

No, no, they don't. But it's like there must be quite panic at the moment, right? Because, okay, while the official narrative, especially in all of the European newspapers, still is, "Oh, Russia's in a stalemate, Russia cannot advance, and now they're getting desperate," that's like even today, even in September 2026, that's still the narrative. It's quite bonkers. But the people in the White House, they understand. And I'm pretty sure even the Merz and Macron and so on, they know that the battlefield is actually moving and that it's moving dramatically against the interests of NATO. Do you think that there is now any kind of emergency coordination going on of how to deal with that? I don't.

#Daniel Davis

I wish there was. I would love it if there was an emergency coordination to deal with the reality, whatever they could say, blah, blah, blah, in front of the cameras. But if behind the scenes there was some reality, I would have a little bit more optimism and hope. But I fear there isn't, because the actions that they're taking and the things that they're saying in public—we also see actions that correspond to that—then you've got to be thinking that maybe there's no realism behind the scenes, that they don't acknowledge it. Because I see so many actions from—I mean, look at Merz. We'll just take him, for example. I mean, you see that they suffered two big electoral defeats in a row from AfD, and just the general gist of things.

You have France, where most polls are saying Marine Le Pen is going to win next year, et cetera. That should ordinarily trigger a political self-preservation thing. We need to change our policies, especially if a lot of it is the support of this war that can't be won, that my generals behind the scenes should tell me can't be won. Then that should change policy. But it doesn't. They keep going down a path that's nearly suicidal. So I don't want to sound like a conspiracy theorist, but when you have evidence that lines up, you have to start giving consideration to it, and you have to wonder: is the intent to draw a general war between Russia and NATO? It sounds absurd to even say out loud.

No, but the actions... you're thinking there might be somebody that actually thinks that they want to do that for some twisted reason. I don't know.

#Pascal

Now, believe me, I mean, listening and actually reading the news in Europe—and also, I was in Switzerland the whole of August, basically—I mean, the war propaganda level is insane. It's insane, the way that currently all of the large newspapers and all of the public messaging is, "War is coming, war is coming. The drones, the hybrid war, we need to get prepared. This is inevitable. The Russians are desperate. They will attack out of desperation, so we need to get ready for a sneak attack," and whatnot. It's really, really bizarre. So even if these people are not doing that behind closed doors and kind of scheming it, it seems that the war—not euphoria, but war is almost euphoria—it's pushing everything in that way. And I wouldn't be surprised if there's people in Washington who would say, like, "Well, if anything can save the situation, well then it's like a couple of million more soldiers, right, into the whole thing." That would make actual sense, wouldn't it?

#Daniel Davis

I mean, realistically, from their perspective, number one, the West altogether—the United States, NATO, anyone else who would be on our side—combined are not conventionally equal to the task against Russia. Obviously, nuclear, we know what that would be. It would be suicide for everyone. But conventionally, we would be wiped out. Already, Ukraine, back to your Ukraine part of that war, they're out of ballistic missile defense. They got none. So they have some at the cruise missile and drone level, but that's porous. But they got none at the ballistic missile level. Russia can now do whatever it wants anywhere, and you can't stop any of it.

We've given so much of that stuff to Ukraine. We don't have much of it even elsewhere. And one of the things that I really point out, because it's so important: if anyone in Europe thinks that they're going to fight a conventional war with Russia—and, of course, it's going to be primarily drones and missiles, especially in the beginning—you damn well better have good integrated air defense at every level, like several levels, from drones all the way up to cruise missiles and ballistic missiles. You've got to have this integrated thing. Russia has it very well developed, and even that has holes in it that can be punched. We've got almost none of that.

So, you know, look at the stuff that's been hit in Russia right now with the energy infrastructure and the plants and the factories and all this kind of stuff. I mean, they've got a lot of stuff, and they're shooting a lot of stuff down, and they're growing with their network of gun trucks and everything else to hit that stuff. We don't even have any of that. Everything we have would be vulnerable. If we got into a war, they could probably—and I know they have this stuff stockpiled up—they could probably launch several thousand missiles in like a 12-hour period that could hit everything, and we couldn't stop any of it. And now that's your start point. Why would you want to get into something that you almost certainly would lose?

#Pascal

Because you can't do anything else. This is how the Japanese got into the Second World War. Oh, don't tumble that out on me. Come on. It's a dumb thing to attack the Americans in the Pacific. That was just a dumb thing to do. And they knew it. They knew this was highly reckless, but it was like, what do you do? So do you think that... I mean, I hope not. I hope not.

#Daniel Davis

Okay. In the case of the Japanese, my assessment anyway is that there was a low probability of success. If they got those carriers in Pearl and they knocked those carriers out, the entire war would have been different. Yeah. But they didn't, and there was happenstance and, you know, clouds and some other stuff, and then the Battle of Midway. Even if the Battle of Midway had gone a different way, if we had not knocked those four carriers out, it could also have developed very differently. Yeah. This is not the case here. You can't say, well, if everything goes our way, this can work. There's nothing going to go your way. Everything.

It's like you don't even have carriers in the equivalent analogy. And I don't know what you're hoping for, because everything that you can see, if it starts, you're on the decline. And of course, industrial capacity is the biggest one, because that takes years of full-scale intention to get changed and to go back up. They haven't even considered that, much less executed that. And Russia is cranking on all, you know, eight cylinders up here. So it is as irrational and almost suicidal as can be imagined to get into a war. And, of course, we haven't even talked about the possibility of that escalating into nuclear, which would be all too easy to do.

#Pascal

Actually, you're giving me a little bit of hope that even if just like 1% of rationality is left, then you wouldn't go there. Okay, let's hope that 1% is left. Danny Davis, you never know. Just before we end, Danny has, of course, his own YouTube channel, Daniel Davis Deep Dive, which you will also find in German, French, Italian, Spanish, Russian, Portuguese. So go and check it out. I will put the links into the description box below. Any other place where people should find you?

#Daniel Davis

Just X of Daniel Davis. It's Daniel L. Davis, the number one on X. Links in the description box. Danny, see you soon. All right. Cool. Thanks.