

Ayatollah Ali Khamenei Is Dead | Iran War Analysis

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Hello everybody, Pascal Lottaz here from Neutrality Studies. I'd like to talk about an update on Iran, because what we're hearing right now—and I think it's confirmed as of now—is that Ayatollah Khamenei has died, or was killed, was murdered, in Iran, in Tehran, in a strike apparently against his residence, in which several of his family members were also killed. I did a livestream earlier today with Michael Rossi and the wonderful Chas Freeman. I highly recommend watching it, because we were discussing the general impact this war will have, and how the whole perception of the United States is certainly going to change, both in the region and globally.

But back then, when we did this three hours ago, it wasn't clear yet whether Khamenei was actually killed. But by now, the Iranian state media has confirmed it. This is an extract from Press TV. If you try to access Press TV right now on the internet, you only get error messages. The Iranian internet is still very much down, but on Twitter they're putting out bits of news until the Iranians actually confirm things themselves. I would recommend not believing news as it comes out. But since we now have confirmation, it's clear that he's gone. Now, this is, of course, very significant. On the one hand, it's what a lot of people expected—how the United States would conduct this strike or this war. They would try to go for a decapitation strike.

And Donald Trump is already on record as having said that diplomacy would be much easier now that Khamenei is gone. I'll discuss this a bit more in a moment, but for now, the important thing is that he was the man who held the most power in the Iranian state—though not the only power. Iran is a complex political entity with a complex structure and different power centers, including the Revolutionary Guards, the regular military, and the various ministries. Power also lies with the elected leaders—there's a parliament, a government, a prime minister, and a president—and the different parts of the cabinet are still very much intact.

So for now, what we see is that Mr. Seyed Abbas Araghchi apparently is still alive. As the foreign minister, it seems that the United States has been targeting the military and the clerical arms of the government. Ayatollah Khamenei is, of course, the religious leader under whom most state power came together, who had the authority to appoint many of the people leading significant parts of the state and the military. But again, he was not the only figure. The United States seems to be betting on the Iranian government falling apart—and the structure of Iran as a political entity collapsing—once he is gone. But I'm pretty certain they'll learn the hard way that this is not the case.

So, just as they thought—as the United States seems to be under the impression that if you take out Nicolás Maduro, you're going to change the entire Venezuelan government—if you kill the leader of Iran, you thereby change the entire functioning of the state. This is highly questionable. Of course, we see at the moment that Iran is still striking back at Israel and at military bases in the region. These here are a couple of excerpts from the news that are circulating on Twitter. It's sometimes difficult to judge whether these attacks are actually from this war or from the 12-day war back in June. There are also videos circulating that depict other strikes on targets that were not connected to the immediate strikes right now. But overall, I mean, the war is in full swing.

Both sides are striking at each other. The fact that the United States was able to kill Khamenei, of course, also indicates that, just as Israel is not able to prevent attacks on its soil, Iran is not able to prevent missiles and bomber strikes from reaching its shores—even the very center of power. Although Mr. Khamenei made it very clear in recent days that he had already appointed his successors and was prepared for this to happen. I must say, I do believe they're making quite a few mistakes here. One, of course, is believing that this will change everything. Secondly, they are, in a way, renewing the Iranian leadership of the state, right? Just as with Hamas and with Hezbollah, younger leaders have now come to the fore. This will do exactly that also in Iran. The next guard is now just coming to power.

So instead of these people going out and retiring from power, they're now being violently replaced. But as in any mature political system, the next level is just waiting to rise to the top. And Donald Trump, of course, is justifying all of this with his obsession with Iran—or his lies about Iran seeking a nuclear weapon. The irony of the whole case is that it was Ayatollah Khamenei who stood in the way of Iran building a bomb. It was Ayatollah Khamenei's fatwa against nuclear weapons that's actually part of why Iran never really developed those capabilities, even though they had—or have, or had, or maybe still have—the capacity to enrich uranium to the level they needed. But it was this religious leader who said these weapons are unholy and must not be produced.

So by taking this man out of the political system, I'm pretty sure that Iran is now even one step closer to the bomb than before. If ever there was a need for proof that Iran, from its own perspective, needs nuclear weapons for its defense, I mean, this attack—this all-out attack, the second one in less than a year—should be more than proof of that. Not that the war in June, the twelve-day war, wasn't already proof that Iran is under very grave threat. But now, having the political leadership also decapitated will probably drive that point home. Whether the fact that the United States has not killed the president and Mr. Arakchi and so on—although I don't know if Mr. Arakchi is even in Iran at the moment—it's very possible, since he's the foreign minister, that he's currently abroad, maybe still in Geneva.

But the fact that the rest of the cabinet—the political, the civilian arm, not the religious arm and not the military arm—has not been attacked might indicate that the United States intends to continue its war diplomacy with Iran. Because one thing that's probably clear is that the United States doesn't

seem intent on actually putting boots on the ground in Iran. That seems completely out of the question. Ambassador Chas Freeman also said so; there's simply not the capacity to do that. So what the United States is probably aiming for is a kind of violent regime change—destroying the military capacities of Iran. Donald Trump said so in his address yesterday. If you haven't seen that, you should watch it as well.

It's eight minutes. It's completely unhinged, in my view, but he lays out his goals—of course, regime change being one, actually regime obliteration, regime destruction. I mean, he wants the Islamic Republic of Iran as a political entity gone. But in order to get there, what he needs is, of course, the regime—some form of transition. In his mind, what he imagined in the video he did yesterday was that he wants the Iranian people, once the bombing is over and once the United States says, "We are done with what we do," he wants the Iranian people to rise up and then take over the institutions, and basically do away with the Islamic Republic of Iran and bring back, I suppose, Reza Pahlavi, the son of the former Shah—bring back the monarchy, bring back a puppet regime.

I think that's the optimal idea of how this should go. And I suppose that now they're intent on leaving some parts of the Iranian power structure that they believe can facilitate that kind of transition. I think this is very misguided. I don't think it will work. But at least for now, that seems to be the strategy. Also, of course, threatening these people—killing Khamenei and then saying, "This is what will happen to all of you if you don't play along with my demands." This is also what happened in Venezuela.

It was the same tactic—to attack the head, to actually take out Mr. Maduro as a show of force—and then to threaten Rodriguez and everyone else in what remained of the government, saying that this, or even a worse fate, would await them if they didn't bow to the superior power of the United States. So I think what's crystallizing now is that the U.S. wants to do something similar with Iran, not just by taking out Khamenei, but by killing him. And this seems to have succeeded. We're reading at the moment that there are celebrations in the streets. There's even a little video—a party in Toronto where Iranians are celebrating the end of Khamenei. And I can believe that this is very much true.

I was not in Toronto, but in Vancouver in January, and I saw a relatively large protest with a lot of Iranians who were protesting Khamenei and the Iranian leadership, actually calling for this. They called for the bombing of Iran—Iranians calling for the bombing of Iran. And these people must be pretty happy right now. I'd like to add, though, that this is nothing we should be surprised about. Just think of the scenes in the streets of the United States if tomorrow we woke up to the news that Donald Trump had died. I'm pretty sure you'd find people who would celebrate that fact very much. I mean, the celebration of the end of somebody's reign is nothing new, and it's nothing special or unique to Iran.

It's something that any country has. There are people who support a government, and there are people who strongly oppose it. And with these kinds of strongman leaders, you'll always have very

strong supporters and very strong opponents. There would be celebrations in the streets if, say, tomorrow Macron didn't wake up—there would be celebrations in France in certain circles. In other circles, there would be a lot of mourning. You'd see this in quite a lot of places around the world.

So yes, the part of Iranian society that was very much opposed to the theocratic leadership—they're the ones who are happy about this. And the people who were in favor, who supported it, they're mourning. There are those scenes as well. Like, in another post—um, there are pictures of... where was that? I think somewhere here, yeah—Al Jazeera is also reporting a tweet from Press TV showing people in the streets of Tehran grieving the death, the killing, of Khamenei. Of course, this is exactly what you'd expect, right?

You have both these sides within Iranian society. So the fact that people are celebrating, or the fact that people are mourning, doesn't really tell us what's truly going on within the state of Iran. But I must say, overall, the fact that Iran was attacked—within the circles of my friends who are very critical of Iran's theocratic leadership—it's not taken well. This is not something most Iranians like or appreciate, that they're being bombed. And the other arms of Iran's political setup, especially the military, seem anything but defeated at the moment. They're continuing to mount this resistance.

And also, within the diplomatic realm, Iran has, of course, called for a meeting of the Security Council and is strongly condemning the actions taken against it. Israel is also still under attack. The news is, though, that there's actually a news blackout. As with the 12-day war, Israel has prepared itself in a way that ensures only certain types of information can get out, and the scope of the destruction now being wrought on Israel cannot be freely or openly broadcast. It looks very much like a repeat of last June, but on a much larger scale—also because Iran is now directly attacking, including U.S. bases in the region.

So far, I haven't found any news about U.S. servicemen or women being killed in the region, but that doesn't necessarily mean anything. Right now, the news environment—the fog of war—is very much upon us, and casualty numbers are not being openly reported on either side. What has been reported is that yesterday in Iran, at least one school came under fire from the Israeli side, and more than 50 students, mostly girls, were reportedly killed in those strikes—likely even more. One of Iran's diplomats is actually talking about several hundred Iranian civilians already dead.

And this is also no surprise, because we know that the Western alliance—Israel and the United States—is implementing this war much as they have always implemented wars: with disregard for civilian lives, right? With the intent, even, to kill civilians in order to pressure the other side into meeting their demands. We've seen how Israel has been conducting its war in Gaza—the genocide in Gaza—where the terrorization and mass murder of civilians are very much part and parcel of the entire plan. And, of course, they're carrying out all this death and destruction while blaming the military forces of the other side for every single death they themselves inflict on the civilian population.

The whole story of Hamas hiding in tunnels, Hamas hiding in every school, and therefore Israel having to bomb them is, of course, part of this. The same narrative continues straight into this war, where now the United States is also taking up this rhetoric—that the deaths are at the hands of the Iranian regime, as they call them. It's a very bleak moment, and it's quite tragic. But again, the death of Ayatollah Khamenei is not, in my view, going to end the war—not at all. If anything, it's just going to lead to the younger guard coming to the fore. And if those are killed, then the next rank, and the next rank after that, will probably come out. The real question is whether the United States can manage this. It has a great number of assets in the region, but those are still finite.

The question is whether, with the missile capacities it has, it can actually destroy Iran's missile capability and trigger this kind of political crisis or turmoil—this political avalanche—that would then sweep away even other parts of the political leadership. Whether that's achievable or not is the real issue. In the discussion I had with Chas Freeman, he very much doubted that this would be the case, because so far pure air war—pure bombing campaigns, whether with missiles or airplanes—against another country, an enemy nation, has no track record of leading to regime change. It would really be one of the very first times that this succeeded without boots on the ground. It didn't work in the Second World War. It didn't work in the Vietnam War.

It didn't work in the—well, it didn't even work with Gaza. I mean, Hamas is still around in Gaza. It didn't work with Yemen; the Houthis are still very much in charge of their part of Yemen. So if this now worked with Iran, it would be a huge surprise. The question again is: how much of Iran's military capacity can the United States actually degrade with this? And how much of its military-industrial base can the U.S. degrade before it starts running out of its own? Something Ambassador Chas Freeman also pointed out is that the ability of the U.S. to replenish its stockpile is very much impeded at the moment. And this war will only lead to an even further depletion of the U.S. military stockpile—these missiles are just way too expensive.

And I've had several guests on my show in the past who keep saying that the U.S. is, at the moment, caught in a crunch because the capitalist system has, over the past 30 years, led to an utter inflation—a complete inflation—of the price tag of U.S. weaponry. With this, of course, the military-industrial complex is making a lot of money. But on the other hand, it's been producing fewer and fewer weapons, which, for once, is actually a good thing—that this kind of kleptocratic corruption of unfettered capitalism is now leading to production problems, especially when compared to how the Russian or Chinese systems, for instance, can churn out military capacity.

But the United States, of course, can still produce these things—just not as fast as they're being fired now at the Iranians. The question is, can the Iranians keep producing their weaponry, and can they use what they have in stock, what they've stockpiled, in this war of attrition against the U.S. and Israel? If, within the next three to five days, the Iranian government and its structure falter the way the U.S. seems to plan for, then the U.S. and Israel basically win. But if not—if this war goes

into the second week, the third week, another month—then, as time passes, the chances are that the whole dynamic, the fortune of the war, will actually shift toward Iran as the U.S. depletes its entire Middle Eastern arsenal.

And then what will happen once the firing rate from the United States side has to decrease because of that—that will be anyone's guess. What, for instance, are the Gulf states going to do, which are now under attack from Iran, or the U.S. bases in those Gulf states that are under attack from Iran? I think Iran actually put out a statement that it is not firing against the Gulf states themselves, but against the U.S. bases, against the military installations, which is also something that's pretty clear. I mean, what will these states do once this whole thing is over and they realize, as they must have realized by now, that the military assets of the United States are a bigger threat to their internal security rather than a help?

And let me just show you one thing that's quite interesting—a video that I also showed in that livestream earlier, from a strike against a U.S. military base in, I think this is Bahrain. Let me see if I can find it here... Iranian missile attack on Qatar. So this is an attack on Qatar, and you can see a U.S. installation—apparently a radar station. I'll play this once again with sound so you can hear what people are saying. Even if you can't understand it, just listen to the end of the video—what you can hear there. These are people in Qatar—Qataris or workers, whoever filmed this—who are cheering once this Iranian drone actually hits the U.S. radar installation.

So this is basically the opposite—this is exactly what I think the U.S. believes Iranians would do once their missiles hit Iranian military installations: that the Iranians would go, "Yay, yay, finally, the U.S. is bombing our military! Finally, we can get freedom." I mean, this is exactly that in reverse—the Qataris, or somebody in Qatar, cheering on the destruction of a U.S. facility there. This is really rather interesting to me. The ambassador, Chas Freeman, also said that, of course, among the general population in Qatar and in the Gulf monarchies, people don't like or support the United States. They don't support the genocide in Gaza.

On the contrary, just like in Egypt, people are very much against what Israel is doing and the violence that they're carrying out. But it is, of course, the leadership in those places that is very docile and collaborative with the U.S. government. Whether that will continue, though, now that it's clear this makes their states even more of a target—especially if this war ends or pauses in an inconclusive way—I really wonder if this won't lead to a complete rethinking of whether these lease and base agreements should be renewed. Of course, if the United States ends up winning big and Donald Trump next week is parading through Tehran, waving to the people who wave U.S. flags at him, well, then that'll be a different story.

But if that doesn't happen—if the assessment that Iran internally wants a regime change, and that the U.S. is just a helping hand in implementing a new Iranian revolution—if that assessment is wrong, which I believe it is, I cannot see that happening. I might be wrong, but we'll see. If this assessment by the United States is wrong, then with every week that this war continues, the balance

of forces, in my view, will shift toward Iran. So really, the... Ali Ayatollah Khamenei is dead; the Islamic Republic of Iran is very much alive at this moment. The Americans are betting that they can kill the Islamic Republic and replace it, maybe with the old monarchy. That still seems to be, right now, the goal.

Probably the United States is now using the connections it still has with Iranian diplomats to threaten them—probably to threaten or even kill the president, maybe other leaders in the cabinet, maybe even the elected members of the Iranian parliament. Just threaten the next level and try to beat them into obedience. And if they don't comply, then maybe kill even more of them. The one thing the U.S. has now proven is that it can do that. Congratulations, United States—you are able, at will, to kill any leader in the world. You tried. Well, that's another question, though.

They tried to do that with Vladimir Putin—they tried to attack his private residence—but they seem to have failed there. It seems that Russia is able to shoot down incoming projectiles over its own soil. The Iranians, obviously, are not able to do this. They can't hide their leadership in a bunker deep enough to be safe from the bombs the United States has. My Chinese friends, by the way, tell me that China is watching this very carefully, and that Chinese media is simply portraying what's happening without any value judgment—no good or bad—just matter-of-fact reporting.

And what they're learning is that, well, what you need to have in this day and age is, of course, a strong economy and the military capability to defend yourself from this kind of aggression and to shoot down these projectiles. This is something Iran didn't have, and it's something, by the way, that's also questionable for Israel—how much they really have. Now, the fact that the supreme leader of Iran has been killed will, of course, lead the rest of the Iranian leadership to think about how to retaliate. So Benjamin Netanyahu really ought to be in a very deep place or far away from Israel. There are some rumors that he might even have left the country or died. I don't think that's true.

I mean, that would be quite something for a leader to leave at this point in time. But he'd better be in a very secure location, because by now the biggest target is probably on his head from the Iranians. This is something they haven't tried to do so far, right? The Iranians, even in the 12-day war, have been very deliberate in their strikes in order to send clear signals to Israel. But now it's clear that this is an existential war for the Iranians—about how to survive. So, as I said yesterday, the calculation now must be how to strike back at both the United States and Israel without inviting nuclear strikes. But anything short of that, including probably directly targeting Israel's political leadership, is most likely on the cards.

So Israel will also be in a very difficult position. We discussed earlier in the stream with Jas Freeman whether this might mean that Iran now has an incentive to try to assassinate Donald Trump. I mean, there's this rumor—this ridiculous kind of assertion—that the Iranians tried to kill Mr. Trump back in the past when he was running for president. I don't think that was true at all. That's very

much a fabricated rumor. But now, now that Ayatollah Khamenei has been killed, I think Iran has a serious incentive to try to kill Donald Trump, because if you can do that, or even attempt to do it, you'd send a very strong signal to the United States that this is not a case where impunity reigns.

The biggest problem, of course, that Iran has is that if they can't strike back at the U.S. and Israel in a way that actually hurts those two, then the people who ordered these strikes will understand one thing: if they push the button, others die and they live. They live. They're going to have breakfast the next morning, go into the office, and everything will be normal. So impunity—impunity will, of course, lead to exactly what Israel is doing in Gaza. It leads to genocide. It leads to mass murder. So the Iranians must be calculating now how to respond to this largest of all kinds of attacks on their political system, including on the political system of the other side.

If the conflict was boiling at a lower level, which it was last June, then both of these regimes would try not to fire directly at each other. Because again, if you cross that threshold—if you cross that red line, if you assassinate the leaders of the other side—then you shouldn't be surprised if what remains will try to assassinate your leadership. Usually, leaderships in both countries, or in both belligerent parties, will try to avoid this unless they're certain the other side can't kill them anymore, right? As soon as you think you have so much superiority that the other side can't physically get to you, then you'll go after them. You'll try to kill the leadership. So the United States seems pretty certain it can inflict on Iran any kind of damage, including on the top leadership, without suffering reciprocal damage.

Damage to the soldiers in the region—Donald Trump made this clear in his speech. You know, people might die, U.S. servicemen and women might die, but that's what happens in war. That's literally what he said. So he literally told us he's willing for the soldiers of the United States to die, and he expects that that is a likely outcome. But he obviously believes that he himself will live—that the Iranians will not be able to get back at him, or at his family, or at his entourage in any way, shape, or form that would make him think twice about these acts, right? And the same goes for the Israelis. I think they are confident that their leadership—that Netanyahu, that the people who ordered and plotted this illegal war of aggression against Iran—will be safe.

So whether or not this is going to be the case, we'll see. I just must emphasize again the incentive of Iran—and this is not me condoning it—I'm just saying the incentive of Iran is now going to be to hit back at the political leadership in the U.S. and in Israel. So this is a very, very great escalation, and it's a very great gamble on the side of the United States, especially of Donald Trump, that this will work. Um, we don't know. I mean, the fog of war again is very thick at the moment. It's very possible that Iran is in utter disarray and maybe disintegrating in a couple of days—possible. Honestly, I don't think so. I don't think it's going to be that easy, or that it's going to be as easy with Iran as it was for Israel to deal with Hezbollah, with the killing of Mr. Nasrallah and then basically forcing the Lebanese, forcing Hezbollah, to stop shooting at Israel while Israel continues shooting at them.

But this is also, again, one thing that everybody in the region now understands. If Iran agreed to stop firing projectiles—stop firing at the U.S. and Israel—then Israel would still continue firing at them. It's utterly clear, because that's what they've been doing. That's what they're doing in Gaza. The ceasefire is a ceasefire only on the side of Hamas, right? The Israelis are still continuously killing, almost on a daily basis, people in Gaza with their attacks, because they're not done with their ethnic cleansing project yet. They keep killing people in Lebanon at will, again because there too they're not done with this abrogation of the Lebanese, the way they want it to be. The same with Syria, and the same is going to befall Iran.

So it's clear that, from a strategic standpoint, Iran is now fully incentivized at all levels of government to continue this war and turn it into an air and missile war of attrition against the other side until they're forced to stop everything for good. It's a very, very unhappy situation. This is a terrible outcome, and it's a terrible crime. This is one of the reasons why the UN Charter forbids all sorts of wars and the use of force in international relations. It's quite, again, just mind-boggling to me that the Europeans stand behind this—that we have these pictures coming out of Europe of leaders actually saying... I don't know if I have it here—um, I don't—but the Europeans already said, you know, that they condemn Iran's attacks on the Middle Eastern region.

Uh, this is utterly ridiculous, of course, but what else were we to expect from the Europeans? They are a joke at this point. We said so in the livestream earlier. They're satellites of the United States. I mean, there is no independent European foreign policy. Although, I must say—and I just want to point this out, just because I'm Swiss, and this is one of the few moments when I'm actually grateful for it—Switzerland, our Ministry of Foreign Affairs, put out a statement. I have it here in German, where it says that Switzerland is deeply worried about today's attacks by the United States and Israel against Iran. They actually said that Switzerland demands the unimpeded adherence to international law, including the Charter of the United Nations and international humanitarian law. This surprised me.

Switzerland—actually, the Foreign Ministry put this out—said they are deeply worried about today's attacks. They used the word "attacks" by the United States and Israel against Iran. The rest of the EU, the Europeans, and the UK, of course, are pretty much condoning what happened and condemning Iran for being such a brutal regime and so on and so forth. But this is just another one of those moments where the Europeans are making themselves absolutely impossible. The solution to this conflict now will certainly not go through Europe; it will again go through the militaries. I don't expect this war to last only twelve days.

As long as the Iranian political structure doesn't collapse the way the United States foresees it—if it doesn't collapse—then this war will probably go on for quite a long time. The Iranians have made it clear that they're gearing up for that. The strategy will be to wear the United States down, to wear its allies down. The fact that there hasn't been an attack yet on Saudi Arabia also seems to indicate

that Iran is calculating politically how to approach the entire region, and that Iran's response now is again a calculated one—one that probably aims to divide the regional alliance the United States has with these powers. The Strait of Hormuz is reportedly now being closed by Iran.

This will have a very large impact on global trade—whether they can keep this closure up, or whether the United States will actually try to force them to stop it and reopen trade—is anyone's guess. The Iranians might try to sink a couple of boats in the Strait and make it impossible for others to pass; that might be a strategy. I don't know about this, but it seems the Iranians are still taking a calculated approach toward the Strait, toward this attack. And we should probably expect a calculated response also to the assassination of Ayatollah Khamenei. Mr. Netanyahu, again—if he's not worried about this—that will probably only increase the likelihood of some attempt on his life actually succeeding. Because by now, again, and I don't condone that...

I do not condone any of the killing that is happening. I'm not saying that's a good thing. I'm just trying to describe what the military and strategic calculations in Iran must be right now—for them to somehow regain escalation dominance and wrest back the upper hand in this long war. By the way, just to make that point, Iran fought eight years of war in the 1980s against Iraq. Iran is not a stranger to the logic of prolonged warfare. It has been under sanctions for decades and is very much aware of how a society functions—or doesn't—during these heightened moments of pressure. And I think that's what I wanted to convey to you now. There will be another update in a couple of hours with Stas Karpivnik about Russia's view from Russia and its likely involvement in this entire affair. Stay tuned for that, and thank you for your attention.