

Iran War Getting Worse For US Every Day | David Pyne

David Pyne, former U.S. Army officer and Deputy Executive Director for the EMP Task Force on National and Homeland Security, joins Pascal Lottaz to assess the Iran war, the ceasefire extension, the blockade, Israel's role, damage to Trump and MAGA, pressure on JD Vance, global fallout for U. S. power, and the Ukraine war's likely path toward collapse and settlement. Links: David Pyne Substack The Real War: <https://dpyne.substack.com/> Neutrality Studies substack: <https://pascallottaz.substack.com> (Opt in for Academic Section from your profile settings: <https://pascallottaz.substack.com/s/academic>) Merch: <https://neutralitystudies-shop.fourthwall.com> Donation: <https://neutralitystudies.com/donate> Timestamps: 00:00:00 Introduction 00:00:18 Iran ceasefire and war update 00:04:08 Trump off-ramp and blockade 00:19:59 Israel role and Iran strategy 00:22:03 MAGA split and JD Vance 00:30:05 Global fallout for US power 00:37:04 Neocons and Ukraine endgame 00:47:15 Final outlook

#Pascal

Welcome back, everybody, to Neutrality Studies. My name is Pascal Lottaz, and today I'm joined again by David Pyne, a former U.S. Army officer and Deputy Executive Director for the EMP Task Force on National and Homeland Security. David, welcome back.

#David Pyne

Pascal, it's great to be with you.

#Pascal

It has been a while since we last talked. You especially had a very close look at the entire development of the Trump administration, I mean, from when he was actually running for it, and you were, like many others, a big fan of the idea of the United States not going to forever wars and new wars in the Middle East. And several times you made the point that this is how he scored among the MAGA crowd and so on. And, well, now we're nearing the end of the second month of the war with Iran. Although today, as we speak on this April 22nd, we just had the news that you broke to me that Donald Trump actually indefinitely extended the ceasefire. Can you give us maybe an update on where we stand today?

#David Pyne

Yeah, I mean, it began with Trump making more threats that he would, you know, certainly go to military action. He thought that bombing Iran was the best choice. And then it was just about 2 p.m. local time here in the United States, or I guess 4 p.m. Eastern, that he decided to go ahead and issue an indefinite extension of the ceasefire. Initially, I mean, he'd been saying for many days that he was highly unlikely to renew the ceasefire. But essentially what happened is Iran, you know, the deadline, of course, was going to expire around 7 p.m. tomorrow of the 15-day ceasefire. He had said—actually, I reported on my Substack—that on Sunday morning he told a Fox News host that everything was negotiated.

I ran it, he agreed to all our terms and that the peace deal would be signed Monday night. And of course, I knew that that was very far from reality. But I reported on that anyway. And it's just, you know, it's gone in the opposite direction because Iran has stated that the U.S. is committing multiple ceasefire violations with the blockade, the seizure of an Iranian tanker by U.S. Marine Corps troops. That's unacceptable. Until the blockade is lifted, there will be no peace talks. So essentially, Iran backed out of the peace talks. J.D. Vance's plane was grounded. It never got off the ground, and he met in an emergency meeting earlier today.

It might have been this morning or it might have been earlier this afternoon with the Secretary of War, Pete Hegseth, and the Chairman of the Joint Chiefs of Staff, probably Marco Rubio. I'm not sure if he's in Washington, D.C., but I'm sure he would have been zoomed in. And they made the decision that going to war, back to war, making good on Trump's threat, because clearly there was going to be no agreement by tomorrow night, was going to be a bad move for the U.S., for President Trump, because it would hurt us politically and economically, and obviously his approval ratings would continue to tank.

The Republican Party's chances of winning the 2026 midterms in November would go even lower. And so he made what I think is the right choice, which is to extend the ceasefire. He should have gone a little farther and said he was temporarily suspending the blockade for a certain period of time in order to give Iran an incentive for peace talks. But he's—it appears to be under the impression, I think a very flawed, mistaken impression, that the blockade will bring Iran back to the table and force them to accept his maximalist 15-point peace plan.

#Pascal

But so J.D. Vance actually never made it to Islamabad. He didn't leave Washington, or did he fly back? He never left Washington. And the thing, though, is that we get all of these reports that actually there are now between 50 and 60,000 U.S. troops amassed somewhere in or near Islamabad—well, the Gulf area. I have no idea where they are, because you obviously also don't want to make them sitting ducks to be hit. But we have reports that this amassing of troops is happening, and we have predictions by people, including General McGregor, that, you know, an invasion is actually imminent. So do you think that this is actually Donald Trump giving in to reality

and at least not going to the kinetic phase anymore of the war? Or is it just another deception, another ruse to try to lull the Iranians before probably on Friday night, Saturday morning, striking again?

#David Pyne

It's definitely a ruse based on what we've heard from a recent Wall Street Journal article. I think it was published this morning or else yesterday. It basically said that Trump is really, he's really scared of being another Jimmy Carter and having a ground invasion of Iran in which, you know, hundreds, perhaps thousands of U.S. troops are killed or wounded. He thinks that would be a disaster that would tarnish his presidential legacy and, you know, take his numbers probably to the low thirties or the twenties. So he is very, very much loath to do that. I think that he's wanted an out. I mean, he's really—there have been reports that perhaps even as early as the first night of the war, when the aircraft carrier USS Abraham Lincoln was targeted by four subsonic Iranian cruise missiles.

Um, I think he got a little bit spooked by that, uh, because Iran obviously, uh, you know, they started a regional war on day one of the war. They escalated just as they promised they would. Um, and, uh, Trump hadn't planned for that. He didn't believe that, um, you know, Iran would escalate by attacking the Gulf States or all those U.S. military bases that have been destroyed—13 thus far. And so he's, at least since March 21st, and I believe much earlier than that, we know for certain that he's been trying to beg Iran for a ceasefire. It used to be that the Democrats here in the U.S. would accuse Republicans and Trump of things that they were guilty of, but Trump and the Republicans were not.

Now things have matured on their head because Trump is accusing the Iranians and Israel—Netanyahu, of course—of things that they're not guilty of, but we are, in terms of being a rogue state, of engaging in terrorist strikes. I mean, certainly Iran has engaged in terrorist strikes, but they've tried hard to avoid this war. Once the war started, they've refused to end it, certainly, but because they're trying to essentially restore deterrence with the U.S. and Israel. They've chosen not to reveal the existence of what I believe to be a modest nuclear arsenal. But they are trying to increase the pain level for the U.S. to the point that Trump will never even consider striking them again.

#Pascal

Hey, very brief intermission because I was recently banned from YouTube. And although I'm back, this can happen anytime again. So please consider subscribing not only here, but to my mailing list on Substack. That's pascallottaz.substack.com. The link's going to be in the description below. And now, back to the video. So you don't think that actually on Friday, Saturday, we're going to see an attack by the United States, a sneak attack on Iran? You think, like, Trump is trying to actually use this off-ramp?

#David Pyne

Yes, he has communicated to his aides, based on multiple reports, that he wants the war over. The reports say he's bored of the war. He wants to move on, maybe to Cuba. I think he's excited to maybe blockade Cuba. Some reports indicate he wants to kidnap the president of Cuba, kind of Maduro-style. He thinks that's much more doable because, of course, Cuba is 90 miles away from the United States. It's a much smaller country with a much smaller military, so it's doable, it's a much easier win, and then kind of browbeat them into, you know, opening up their industries to investment or U.S. political influence.

But I think he understands that Iran is, you know, it's a tar baby, it's a debacle, it's an unwinnable war, all the things that probably... I know I predicted, and I think you probably predicted as well, that it would be a strategic disaster if the U.S. went to war with Iran. And that's what all the war games were showing. U.S. military war games that were done over the past, I think, 20 years have shown that the U.S. could not win a military victory against Iran. I think it was Fox, or I think it was the Wall Street Journal also that reported that, or maybe it was the New York Times.

Yeah, it was the New York Times that reported that there was kind of a chaotic internal discussion, and basically General Cain said regime change was impossible, and Rubio said, so basically you're saying it's kind of BS, Israeli propaganda, and J.D. Vance, of course, opposed it. But Trump was the only one who believed Netanyahu's propaganda campaign when he did his U.S. intelligence briefing in the Situation Room on February 11th. Then, I think it was February 12th that he said, OK, it's a go. Let's do it. And, you know, we had two weeks to prepare. Actually, yeah, two weeks to prepare—16 days. And it just wasn't planned. It was planned as a four-day war, maybe a seven-day war. And of course, it became, you know, a six-week war, essentially.

#Pascal

So the fact that he now extended the ceasefire indefinitely, I mean, from the U.S. side, we still need to see whether Iran agrees, right? A ceasefire is a two-way street. Iran could say, like, no, we're not extending. I mean, this is over. We're going back to kinetic. We're going to go back to attacking. But that would be untypical for Iran because usually they wait until they're struck first. But let me maybe ask, what does it then mean that the blockade is still up and running? Because a blockade is also an act of war. And actually, the United States is doing an extended blockade, not just of the coastline of the Strait or some parts, but highly illegally, just of the entire country. And now seizing tankers, Iranian-linked or Iranian-flagged, anywhere on the high seas. How do you think that will go down?

#David Pyne

Well, I think the U.S. naval blockade is adhering to the rules and laws of war. You know, we've accepted food and medicine, so we're going after tankers. And we've decided to not—you know, Trump said today that we're blockading the Strait of Hormuz. Actually, that's not accurate. We're

blockading Iranian ships and any ships that go to and from Iran. So it's a blockade that's limited to Iran and any ships, neutral ships or allied ships, that travel to and from Iranian ports. But it's a blockade. You're right. It's an act of war. That's what Iran has claimed.

That's why they're refusing to meet with the U.S. until the blockade is lifted for any peace negotiations. And I think rightly so. I think they have a good argument on that because, obviously, that's a violation—an egregious violation—of the ceasefire. It's an act of war. A ceasefire, you know, means a ceasefire, essentially. So... I don't think—I think that there have been reports that Iran has rejected the ceasefire extension. But in practical terms, that rejection is meaningless because, as you noted, Iran is not an aggressor country. Yes, they've supported terrorist proxies against Israel.

I think they were highly supportive of the October 7th strikes, Hamas strikes on Israel. But ever since, they've made it very clear that they never wanted a direct war with the U.S. or Israel. It's kind of been like a low-level war, an indirect conflict, much as the U.S. has done to Iran and other countries, kind of a proxy war. And they've been pushing these, but they understand that if they let the U.S. off the hook right now without increasing the pain level, the likelihood of Trump coming back in eight months and starting another war with them is probably pretty high.

#Pascal

Yeah, and again, the blockade is still up and running, right? So the United States is still trying to strangle Iranian international trade—all seaborne trade—apart from also the rail links that the United States already bombed to inhibit overland trade of Iran inside the country and the link with China. Do you think that Iran will just, like, not do anything anymore in terms of warfare as long as the blockade is—as long as this seaborne trade blockade is up?

#David Pyne

Yeah, I think, well, of course, Iran has stated that they have engaged in drone attacks against U.S. warships. I've seen no confirmation of that. I think it's dubious that they've done that. But certainly, that's the risk—if we, you know, fired on an Iranian tanker with a destroyer, five-inch shells took out their engine compartment. So if we continue doing that and we're conducting kinetic strikes on Iranian ships, they're going to have a much higher incentive to do the same to the U.S. Of course, we know that U.S. destroyers are well within range of Iranian anti-ship missile strikes.

Our carriers—we're bringing in a third carrier strike group. The USS George H.W. Bush carrier strike group has moved around the Cape of Good Hope, South Africa, because we were afraid to risk the carrier in the Red Sea. In the strait there in the Red Sea, the Houthis have Mach 4 supersonic anti-ship missiles, including anti-ship ballistic missiles the U.S. doesn't even have, that very well could disable or even sink that carrier. So, you know, we're bringing a lot of warships in there to secure the blockade, but most of our ships will be dedicated to carrier air defense and not actually enforcing it.

#Pascal

Right. So do you think the U.S. will be forced to also lift the blockade at some point because it's not feasible anymore, either because it costs too much or because it will cost too much goodwill also from third countries who want to trade with Iran? Because let's not forget, it's not just blocking Iran's right to trade with others, it's also blocking the right of others to trade with Iran, which, you know, historically speaking, has a lot of precedence. That's usually what happens in war. That's what Napoleon tried to do to the Brits, and the Brits to the continent, and Hitler to everybody else. You know, you usually try to inhibit anyone from trading with your enemy. The United States during the Second World War had a Trading with the Enemy Act, which they applied also to third neutral states and so on. But eventually these things tend to come to an end because they anger everybody else. How do you see it, like, let's say, together with China and Russia, the blockade?

#David Pyne

Well, the problem with the blockade is it's a counter-blockade, of course, because Iran is essentially blockading, you know, most of the ships coming out of the Strait of Hormuz. So if Iran wasn't doing that, I think Trump could maintain that blockade more or less indefinitely. The problem is that Iran is blockading all the ships that we want to go through, you know, we want to get through our blockade, which is, you know, the Gulf state ships and any ships that are doing trade with Iran. And so Trump's counter-blockade, which he says is closing—you know, he's now saying that we're the ones that are blocking and closing the Strait of Hormuz, as if that's a good thing.

What he's spent the last several weeks, you know, threatening Iran that they need to open the straits. And the reason that's a problem is because it's going to increase the price of oil and other goods, fertilize or create scarcities. We've seen that in, I know, South Korea, probably very soon Japan and Europe as well. Robert Pape, I think, was interviewed in the last few days. He's a foreign policy realist scholar who studied economic sanctions. He says we're going to be within probably a few days, later this week or the weekend, there's going to be not just increased prices but shortages. So, you know, that's going to invite a global recession, a U.S. recession, and it's going to happen. You know, it's going to alienate our allies and hurt them.

It's going to hurt Americans. It's going to make the cost of living higher. And it's going to anger, you know, the American people against Trump. And they're going to, you know, deliver an epic wipeout of the Republican Party in America, both houses of Congress. So I think you're right. I think we're going to see Trump, I think, in short order. I think within the next four weeks, he's going to be forced to lift the blockade. He'll probably make up some excuse for that. And he'll, you know, do it, you know, he'll just say, we want to get this over with. You know, we've decided to temporarily lift it or suspend the blockade just to get a deal. And then if we get a deal, the blockade will be over.

#Pascal

Yeah, I mean, the amazing thing that Donald Trump managed to do is that he completely established the fact that he can live in his own world, right? He could declare victory tomorrow: the Iranians gave up, we won, therefore the blockade is lifted. Let's declare Victory Day and have a parade in Washington. I mean, he could do that. He could do that and everybody would go along with it. Of course, not the Iranians—everybody would see through it—but they would go along. And especially the New York Times and so on would actually then do very serious analysis on how true the claims are and so forth. I mean, it's a really bizarre moment, actually. But so overall, you would think that the strategy of Iran is just, you know, Iran didn't need to win the war; it just needed to keep standing. And Iran, in a sense, doesn't need to defeat the blockade; it just needs to keep standing again, or keep sailing. So that will just continue.

#David Pyne

That's correct. Yeah. I've been saying from the beginning that Iran really has two objectives. They need to win the war—that's to maintain their regime, you know, to maintain some kind of ability to strike with, you know, thousands of missiles, which they do. There was a recent article here in the U. S. press, I think it was in The Hill, and another media source as well, that said Iran maintains, according to U.S. intelligence, thousands of missiles and drones, including anti-ship missiles that it could use to bombard Israel, to attack U.S. allies in the region, to shut down energy infrastructure, and to sink U.S. warships. So that's one objective. The other objective, of course, is to maintain control of the territory in dispute, or the sea in dispute. In this case, that's the Persian Gulf and the Strait of Hormuz. So it's, you know, everyone knows or should know that victory in a war is the side that maintains control of the disputed territory, which in this case is the Strait.

#Pascal

Right. So what do you think the Israelis will be doing? I mean, how it looks to me from here is that Netanyahu and the IDF would actually want the war to continue, right? I mean, not their war, not them fighting Iran, but they would want the United States to continue fighting. How do you assess the role of Israel?

#David Pyne

Well, Israel, we know for several weeks, was killing off all the moderates. Everyone, you know, according to Trump, he had like three different choices for who to replace the Ayatollah Ali Khamenei, and all of them were killed by Israel. So, you know, they've killed off all the moderates. Now there are the hardliners who are taking control. The IRGC essentially is running the government through their proxies. The new Ayatollah, of course, Mojtaba Khamenei, is considered a hardliner. You know, he's always been an IRGC ally or asset, fully aligned with the hardliners.

And he's got every reason to want to, you know, kill Americans, you know, or Israelis because, you know, we killed their first family. We killed, you know, his wife, his sister-in-law, his niece, and his

father. So, yeah, he's, you know, he hasn't manifested that way. He hasn't done anything drastic, but certainly the risk is high if we were to restart the war. And if we were to take out their energy grid, if we were to take, you know, their power plants, their oil refineries, I think, you know, Iran could potentially not only do the same to our Gulf allies, they could engage in massive cyberattacks against the U.S. homeland as well.

#Pascal

So, what is this doing now to Donald Trump's base? I mean, again, you've observed that from years ago and from the inside, from CPAC and so on. What's the mood at the moment within the Republican Party? Yeah.

#David Pyne

You know, it's mixed. I have friends that are hardcore Trump supporters. You know, he could practically join the Democrat Party and they would follow him and say he's putting America first. I mean, they're complete zealots, you know, cult members, essentially. But there's also about 13 million Republicans and independents that voted for Trump in 2024 and no longer support him. So he's lost about 70 percent of his voting base. And that's, of course, not just the war. It's the economy, obviously, that's changing. It has taken a big hit, and a much bigger hit because of the war. But I do think the war is a big reason for that. And he has completely blown up his base, his conservative political base.

He's attacked Tucker Carlson and Megyn Kelly and Alex Jones and other folks, obviously Joe Kent, who served as his director of counterintelligence. Someone who's always been pro-Trump, still is pro-Trump, but he's a principal opponent of the war. And the problem with President Trump is he equates any disagreement on a major issue as disloyalty. And so he lashes out at people who have never attacked him but are merely critical of his policy in the belief that he's putting Israel first and America last. And that's really hurt him a lot. And if he were to run for reelection, if it was tomorrow night, he would lose in a landslide.

#Pascal

Do you feel sorry for JD Vance? Because, I mean, Vance was kind of the designated heir, in my view, of the MAGA movement. And it seems to me that Trump just wrecked all and any hope for him to basically pick up where he left off. Also, like, I will never forget Donald Trump's speech that he gave—what is it called—the commencement speech at the beginning of the presidency, or the inaugural address. And he literally said, because I thought those were brilliant words, "We will not only be remembered for the wars we ended but also for the wars that we never got into." That was a brilliant thing to say. And then he did the exact opposite. Will Vance suffer, or will the entire movement basically suffer from this? And is it over for MAGA the way we knew it?

#David Pyne

Yeah, MAGA has been subjected to a hostile takeover. They've been taken over by the neocons. They don't even realize it. I mean, 99% of congressional Republicans voted to give Trump a blank check to fight the war indefinitely. You know, it hasn't turned out as badly as some of us feared in terms of the ceasefire. If the ceasefire can hold, you know, I think the worst possibilities are averted from the war. But in terms of the political and economic costs to the U.S., it's going to, you know, the damage has been done. Essentially, the Republican Party, the base has been fractured. The movement is, you know, the Republican Party won in the 2024 elections because we ran as the party of peace. Now, there's no way we can run as the party of peace.

I mean, certainly, if Trump were to be impeached and removed in January, that would give Vice President Vance long enough to prove that he's a peace president. He could end the war in Ukraine in a day. He could establish eternal peace in the Middle East. But he's going to be forever tied to President Trump. And the chances, of course, of Trump being removed from office are still very low because of all the sycophants he has in the Republican Party, certainly in Congress, and the neocons that might not even like him but love that he went to war with Iran because they're controlled assets of the state of Israel.

So I do think Vance is probably unbeatable. I think even if President Trump endorsed Rubio, I mean, he'd have to really go on the attack against Vance to prevent Vance from winning the nomination. But sadly, the rumors are that Vance sees the tea leaves, and he's reportedly considering not running in the next presidential election because he thinks it's unwinnable. You know, he can win the nomination. He can do that by a wide margin. But the chances of him winning a general election, you know, with the Republicans branded as the party of war and, you know, with the economic recession that's likely in our very near future, seem pretty low.

#Pascal

You know, he's to me this one figure, maybe together with Tulsi Gabbard, but she's been much less publicly exposed since she was sworn in, that I still wonder, that belief that I think belongs to this, yeah, the peace faction and the actual America First faction of the Trump faction, right? And it was so strange to me that he, I mean, he must have opposed this war. He must have said that he doesn't think this is a good idea. I just cannot imagine him signing up for all of this wholeheartedly. But then he's the one who was sent to negotiate in Islamabad.

#David Pyne

This is—why that strategy?

#Pascal

And then also what we know from Professor Marandi and others is that Vance constantly was forced to basically call back to Washington and actually also call back to Tel Aviv in order to check in with the overlords about what can and what cannot be agreed to. This is a weird, bizarre way of doing diplomacy, isn't it?

#David Pyne

Well, I do think there's quite a logic to it, because the Iranians know, of course, that J.D. Vance opposed the war. They know he's an honest and trustworthy and honorable man, unlike the President of the United States. And so, what better American to lead the delegation than Vice President Vance? And they've said as much. They've said that basically their view of Steve Witkoff and Jared Kushner is they're Israeli agents. They don't represent America. J.D. Vance represents America. And I think that's a very true statement.

So, yeah, I mean, the irony is that, you know, it's been reported again in the U.S. press just in the past few days that J.D. Vance's national security team and press team are really just exhausted because they're forced to defend the war in Iran, which they know perfectly well their boss hates. Their boss opposes it and has been doing everything possible to end it. So what I wrote in my last article is that President Vance had been given full negotiating plenipotentiary power to negotiate on behalf of the United States. If he hadn't had to make 21 calls to President Trump in 21 hours, if he hadn't had to call Netanyahu to get permission on his end because Trump said he had veto power over the nuclear part of the deal, then we would have had a deal on April 11th and the war would be officially over.

#Pascal

Yeah, so in a way, constrain the hands of the last kind of trustworthy or actually peace-interested person within the team. What does that mean, though? We are now nearing the end of the second month of this war, and I don't view the war as over yet, but a different phase of it — a less kinetic one, but one where we will see assaults in different ways. Where does this leave us internationally, with China obviously observing all of this? And according to my sources, at the beginning, it was highly doubtful that Iran would manage to keep standing, but now actually gaining a bit more trust again in Iran's abilities. And with the Russians who, you know, had a windfall for their oil sales and exports — something that the US and Europe wanted to curb down for the last four years — now they basically have achieved the opposite of that. Where does this leave us?

#David Pyne

Well, I think it leaves us in a much worse position internationally. Certainly, in terms of our alliances, they are gravely weakened. I mean, you know, we didn't have a single ally, a NATO ally, that came to our assistance. They didn't even send a minesweeper, you know. I mean, they didn't even send a non-combat ship, let alone combat forces, in Afghanistan. And why should they? You know, we

didn't consult them. We conducted an illegal war of aggression, a violation of international law and a violation of our own Constitution. And it was unnecessary and unprovoked.

So, but at the same time, you know, I think this gives a lot of impetus. And I've heard it from neocons in the Trump administration and Trump's inner circle that it may be time to leave NATO. And so I think that would be a really great thing if the U.S. could leave NATO. I mean, nothing symbolizes America's liberal empire like our membership in the NATO alliance. And most likely it wouldn't be leaving NATO; it would be simply leaving the NATO military command structure, withdrawing perhaps one-third, half of our troops from Europe.

And redeploying them back to the United States and trying to implement Trump's outstanding national security strategy, which he pretty much flushed down the drain with this invasion of Iran, which said that we would basically pull out of much of Europe and the Middle East. We wouldn't waste our military resources and our trillions of dollars fighting unnecessary wars in Ukraine and Iran. But that's really where we need to get back to, and I'm just hoping that Trump continues to get a hard dose of reality and understands that he made a huge mistake, a colossal mistake, but it's partially correctable, and if he agrees to most of Iran's terms, I think we can spin it as a victory, as he always does.

He spins defeats as a victory, and obviously in Venezuela, he spun that as a victory, even though we didn't really accomplish anything. We opened up their economy a little bit, but their communist dictatorship is firmly in place. The U.S. doesn't have any troops there. Last I heard, we were still blockading them, but I think that's probably over because we lifted sanctions on them. But, you know, that's what Trump does. His basic, you know, his hardcore supporters will believe anything he says. So if he spins defeat as a victory, then, you know, he might be able to get away with it.

#Pascal

The alliances in West Asia, in the Gulf, do you think those have any chance of surviving this? Because at the moment, the Gulf states are still, out of sheer necessity, basically singing the tune of, oh, Iran is attacking us and everything is so illegal. Our great alliance with the United States is important and whatnot. But, you know, they were basically thrown under the bus, and I'm pretty sure they understand that they were thrown under the bus and that they were willingly sacrificed, as you know, a sacrifice the United States was willing to make in order to do favors to Tel Aviv. Do you think that in the United Arab Emirates, Qatar, Bahrain, U.S. bases will remain there?

#David Pyne

Well, the U.S. bases in the Gulf region have been destroyed, so we'd have to rebuild them, and that would likely take years. I mean, certainly our Fifth Fleet headquarters in Bahrain has been completely wiped out. So I don't think we'll ever say it, but essentially America's military bases in the Gulf region are a thing of the past, I think. Our Gulf allies, they might remain our allies on paper. But

in practice, you know, Iran's the new regional hegemon of the Persian Gulf. Basically, you know, Israel is now the hegemon of the Western Middle East, and Iran basically controls the Eastern Middle East minus Pakistan. So, um, you know, I think that's the new reality, and, uh, you know, that's not a win. I mean, that's a huge strategic defeat.

And what I predicted on March 5th, when I wrote my article on The Real War Substack, was that this would completely, you know, change the balance of power, both regionally and globally, against the United States and in our enemies' favor. And just to answer your last question, I think China, Russia, and Iran are the biggest victors of this war. You know, Iran, I guess, some people find that hard to believe because we certainly did score a lot of military successes operationally against them, but strategically we lost the war. We won every battle, famously in Vietnam, but we still accepted North Vietnam's peace terms, and then we vacated the region, and South Vietnam fell two years later.

So that's essentially what this is. And it's obviously not the same situation, but the similarities increase, I think, if all this work goes on. And China, of course, they basically control the strait through their Iranian proxy because they are, of course, military allies. So that's 20% of the oil reserves of the world that has to go through IRGC Navy-controlled strait. So, this has been a—and not only that, the U.S. has transferred a lot of its military power, in terms of, you know, bad missile batteries, out of South Korea and Japan.

So our missile defenses have been degraded in the Western Pacific. We have fewer ships. Obviously, if China were to invade Taiwan in the next couple of weeks, there's really nothing we could do about it. So that's the new reality in the Western Pacific as well. I mean, we were already facing tremendous military disadvantages in terms of missile stocks. But now our Patriot missiles, I think, are depleted by at least half—50%, maybe even 70%. According to a couple of national security experts, we only have enough missile defense interceptors to fight for 24 hours in high-intensity combat in the Western Pacific with China. So, essentially, the war would be decided by day two.

#Pascal

What... do you think this will finally, finally hurt the neocons in Washington? That they will lose the ear of the president, and that, you know, past wars, the neocons tend to just come out as, you know, go into hiding for a couple of months or years in some of the think tanks, and then they're right back. They're there in the Democratic Party, they're there in the Republican Party, and they tend to then have their coalitions with whoever it is locally who can be used—be it the ultra-right wing in Ukraine or be it the Netanyahu government—whoever is on board with war, war, more U.S. foreign wars. Do you think that this episode will change anything in that dynamic?

#David Pyne

I think it's unlikely, unfortunately. I think, yeah, their hold on Trump, you know, and the administration is really kind of a stranglehold. I think it would take President Trump to turn on the neocons and blame all the neocons that said it was, you know, like Hegseth. Hegseth, of course, he was America's first conservative until he wasn't. He was one of the voices in April of last year that convinced Trump not to attack Iran, and then he just did a 180 flip and is really the worst actor in the White House right now, the one who was telling Trump that this would be an easy deal, it would be over in a week. He needs to go. He's a corrupt, corrupt neocon.

I think Rubio is going to be—right now, of course, Trump is the neocon standard-bearer. All the never-Trumpers, the neocons, you know, who used to oppose him because he was anti-war, are now his biggest cheerleaders. You know, like Mark Levin and Ben Shapiro and folks like that. So I think that the neocons, if Trump doesn't turn on them, they're going to remain strong. I mean, they control 99 percent of members of Congress. You know, in a sense, the ceasefire has saved the neocons. If the war had continued, if it turned into a Vietnam-style conflict with thousands of dead Americans invading Iran, I think there could have been a strong backlash. But if Trump spins this as a victory and most Republican Party members believe him, I think the neocons are spared and they retain control.

#Pascal

That's too bad, um, because they also still try to wreak havoc with Russia, of course, although with the war in Ukraine, things seem to be going, um, well, very much in favor of Russia. What is your assessment there?

#David Pyne

I think Ukraine is, you know, it's very close. I think I previously assessed that they could run out of troops effectively, you know, maybe not all the way out of troops, but the number of troops left by November of this year will be so minimal that I think Russian forces could advance on all fronts. Really, I mean, Russia's had the ability to, obviously, from, you know, just in the first 11 days of the war, they were advancing armored formations. 1,100 tanks came within two miles of Kyiv, this is the capital city of Ukraine, and they were outnumbered.

That's the amazing thing, is they had three and a half times fewer troops in Ukraine than they have today, and they were still able to storm the gates of Kyiv. And, of course, if, you know, Russian President Vladimir Putin hadn't made the fateful decision to withdraw those, you know, Russian troops from three Ukrainian northern oblasts, including Kyiv, on March 26th to April 4th of 2022, then the war would have ended on Russian terms with the Istanbul Agreement. And they've retained that ability. They currently have between three and probably close to four times as many troops as Ukraine has within Ukraine, in terms of active-duty troops. So really, you know, reportedly Putin is reluctant to make another run at Kyiv, a northern offensive.

I've spoken with a member of the Russian army. He's not an officer, but he's kind of a military advisor. He's a former U.S. Army officer. And he basically said that the word in military circles is that Putin is fearful that NATO might react if he were to take Kyiv and basically seize control of half the country. So he's been fighting, he's been essentially wearing down and bleeding dry the Ukrainian army with the understanding that if Ukraine doesn't have any troops, you know, it doesn't matter what the cap is in a treaty. They could say, yeah, Ukraine could have a two-million-man army, but they won't be able to have more than 150,000 or 200,000 max troops. So I think it's not the best strategy.

I think the casualty count has been five to one in Russia's favor over the course of the war, a little bit less than that, but, uh, you know, still heavily in favor of Russia. So, uh, on one level, you know, in terms of the casualty count, the strategy is working, but it really just doesn't make any sense, you know, since Russia has had the ability to capture the capital for at least the past couple of years. And, of course, at the onset of the war, they had it partially surrounded on three different sides. You know, it just doesn't make sense to keep fighting the war indefinitely. But I just think that the outcome is inevitable, and I think the Ukrainian army is likely to suffer a full-scale military collapse by the end of the year.

#Pascal

Yeah, and we must not forget, though, that, you know, even if the Russians captured Kyiv, it would not be the end of the war. I mean, the diehards would just retreat into Galicia and go to Western Ukraine and then keep on fighting from there. So at some point, there must be some form of political settlement one way or another. As all wars need some settlement one way or another, the question just is, how bloody does it still have to be in order to get there? Do you have any hope that the United States will finally, finally agree to the Russian terms and then force their proxies in Ukraine and Europe to actually go along with it? Or do you think that the US strategy will keep being what it is at the moment, which is this low-level kind of support of what's going on in order to try to counter-bleed Russia dry?

#David Pyne

Well, I think, you know, ironically, Trump really has remained consistent at the private level. He's, you know, he's told—I think it was October—he met with Zelensky in the White House, and it was a profanity-laden meeting. He got, you know, his anger was volcanic, and he threw Zelensky's map on the ground and said, you know, these are the best terms you're going to get. Ukraine is going to be destroyed. You're going to be defeated. You know, he just said, take the deal. It's a good deal, you know, what Russia's offering. I think that's true. I think Russia's terms up to now have been fairly reasonable. I think they could be much harsher if the war continues.

Obviously, if there's a military collapse, they'll get to set the terms whether Ukraine accepts them or not. And they've made very clear that those terms are not just four oblasts, but about nine oblasts,

Ukrainian oblasts. I mean, five with Crimea. And that would be about 43% of Ukraine's territory and population. So I think that, you know, that may be the grim reality that Ukrainians face, that if they don't settle this year, Ukraine will be divided, you know, with about 45% under Russian control, perhaps a satellite state or perhaps fully annexed to Russia, you know, and a Ukrainian rump state that's a landlocked country that's even poorer than it is today. And it's very poor. It's the poorest country in Europe by a good margin.

#Pascal

Yeah, of course, like the Europeans asked the poorest part of Europe to go and die for them against the Russians. So how high do you think the likelihood is that Russia will try to get Odessa?

#David Pyne

Well, what?

#Pascal

Odessa. We'll try to go for Odessa.

#David Pyne

I think the chances are, if there's a collapse, I think it's pretty much guaranteed that they would take Odessa. Not guaranteed—I think that's too strong a prediction—but there's a high chance they would take Odessa. You know, I don't think they—you know, Putin, he's not Hitler. He doesn't want any more territory. He wants 1% more of Ukraine in the Donetsk region. He wants full control of Donetsk. He already has full control of Luhansk. He's got the three other oblasts under his control. So he's, you know, that's 20.3% of Ukrainian territory by my count. So, you know, that's not a huge region. It's a region that's, you know, maybe one and a half times the size of Lithuania, which is a relatively small Baltic country.

So I think that there's a lot of hardliners. Putin, of course, we know is not a hardliner in Russian circles. There are a lot of hardliners that would love to see Russia annex half of Ukraine. I just don't think Putin wants it, you know. So even if there was a full military collapse, I think he would stop at the gates of Kiev and, you know, give some of the territory back even, perhaps. But he would certainly insist on maybe a demilitarization of the eastern half of Ukraine. And essentially Ukraine would, for all intents and purposes, become a Russian satellite state if they couldn't have troops in half the country.

#Pascal

Well, okay, so in conclusion, we're basically at a point where both of these wars—the Ukraine war and the Iran war—are not over, but kind of stuck. The United States is stuck. I mean, you cannot get through what was the original neocon idea of all of this warfare. And there's no good reason to believe that this can be reversed anytime soon, right?

#David Pyne

Yeah, there is. I mean, certainly the war in Ukraine is unwinnable. The war in Iran is unwinnable. You know, really it would take, I think, nuclear weapons for us to defeat Iran. You know, certainly I think we could probably maybe achieve regime change, or maybe not, but certainly we could probably take control of the Strait if we used nuclear weapons. There was a recent exposé where one of the DOD's top nuclear chiefs was interviewed by an undercover reporter, and he said that the U.S. has absolutely no plans to use nuclear weapons against Iran. So that was clearly bluster. I don't think it's going to happen.

So, yeah, it's completely unwinnable. And I do think, you know, Trump's been wanting—he's been wanting out of the war in Ukraine. I think probably he's felt less pressure because Iran's been the biggest issue. But I think he's anxious to kind of, you know, move his concerns elsewhere. I think maybe he'll go back to wanting Greenland. I mean, that's really the only thing he's wanted in terms of aggression that I've been supportive of, because there's not a lot of people there. Obviously, it would be a massive violation of Denmark's neutrality, or I guess alliance, you know, because we're allies.

#Pascal

Yeah.

#David Pyne

And it would be a territory grab, you know, so it'd look really bad and further damage our alliances. But in terms of an actual, you know, something that's achievable, that doesn't hurt people, we could, you know, pay off the Greenland, uh, Greenlandic citizens, uh, you know, a billion dollars each or a hundred thousand each. Uh, everything else pretty much almost that, you know, that Trump's doing in terms of invasions or bombings, I think is just really uncalled for, and we need to oppose it.

#Pascal

Well, we'll see where this goes. Um, for people who want to read more of your analysis, they should, of course, first and foremost, go to your Substack, therealwar.com. That is right.

#David Pyne

It's dpyne.substack.com. Once again, dpyne.substack.com. And it's The Real War Substack. I named it after President Richard Nixon's seminal book on national security, which kind of informed my foreign policy back when I was in high school in the mid-'80s.

#Pascal

Okay. I will put a link to your Substack in the description below. David Pyne, thank you very much for your analysis today.

#David Pyne

Thanks, Pascal. Always a pleasure.