

Patrick Henningsen: Multipolar World: The End of US Military Dominance

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#Nima

We had the Iranian foreign minister going to St. Petersburg, meeting with Vladimir Putin. Then later on, we had the phone call, where it seems that Vladimir Putin called Donald Trump. They talked about what's going on, both in Ukraine and in the Middle East. And here is what Donald Trump said about that phone call.

#Reporter

Progress in the space area, and what else did you talk about?

#Trump

I didn't talk about space. I talked about Ukraine, and I talked a little bit about Iran. I talked about a few different subjects, mostly about Ukraine. And we had a very good conversation. I think we're going to come up with a solution relatively quickly, I hope. I think you'd like to see a solution, I can tell you, and that's good. Yeah.

#Nima

Patrick, in your opinion, what does Donald Trump want from Russia, and what does Russia want from the United States in both conflicts, in Ukraine and in the Middle East? And how did you find the call? We don't know. Nobody's talking about it. I have seen a briefing on the Russian website, the Kremlin website, but there is nothing in that briefing that shows what the real objectives of that call were. Your understanding of that?

#Patrick

The most important question, Nima, is who initiated the call? Who initiated the call? Was it Russia or was it the United States? Similar question: who initiated the ceasefire with Iran on April 6th or April 8th? I'm not sure what the date was, but was that Iran or was that the United States? I think the

answer to both of those questions is the same — it's the United States. So it's very important who initiated the call. And I think it was, that looked to me personally like a panic phone call from the White House after the meeting with Abbas Arachi and Vladimir Putin in St. Petersburg. That's my reading of it, just the timing. I don't think that's a coincidence. The Ukraine conflict, it's not even on the map geopolitically or in the news cycle. And as we know with Donald Trump, everything's about the news cycle.

I'm sure he'd like to get a win in Ukraine or something he could take credit for — ending the war after not ending the war for the last 14, 15, going on 15 months very shortly. So I'm sure he would like that. But Russia doesn't want anything from the U.S. other than something productive. So it goes back to the original point with the Ukraine story — Russia's been very, very persistent in their demands. And they want the United States, in their delegation, to address the root causes of the conflict. Because if you don't, it's common sense — if you don't address the root causes of the conflict, then you can't possibly even pretend to be able to chart a course toward an armistice or a binding agreement or political settlement at the end. It's just impossible because you can't agree on the premise of how the thing started to begin with, legally and so forth.

So this is where the U.S. will never be able to meet the Russians on that point. They can't, because the U.S. started the war in Ukraine. That's the point. The U.S. did, the EU did, NATO did. They started the war in Ukraine, and that's a fact. And there was a U.N. Security Council Resolution 2202 that more or less admits that. In other words, there was a peace process, and the Europeans and the Americans basically sabotaged it because they wanted this war to happen in Ukraine. So that's an established fact, at least from the Russian side. They understand that, obviously. But the West, the U.S. and the West, will never—I don't think it would be very difficult for them to ever admit it, at least with the current administrations we have, governments in Washington and in Brussels. I think it's impossible.

If a Democrat government came in in Washington, they would never address the root causes because they would have to basically impale Barack Obama and Joe Biden on the cross of geopolitical responsibility for starting that conflict. So the Russians—I think the conversation the Russians and the Iranians had in Moscow—I think there's a real meeting of the minds because both countries, both governments, have gone through a similar experience here. And both of them are in a similar position vis-à-vis the United States and the Western power structure, whereby these are both basically untoward, dead-end wars of aggression that have been waged as proxy wars, whereby Ukraine plays a similar role, in a sense, to Israel, where it's being used in a way as the American proxy against Iran, although it is a direct attack.

Iran is a direct adversary and existential threat to the state of Israel in terms of its legitimacy in the region. But Iran's been able to bleed out the U.S. economy and part of its military-industrial complex as a result of this conflict. And Israel is also trying to bleed out the Iranians, and it hasn't worked.

Similarly, Ukraine has tried to bleed out Russia on behalf of the West, and it hasn't worked. But Russia's bled out the European economy and the legitimacy of its political leadership as a result of this war.

So when the Iranians and the Russians get together, they're in this very similar chess match, and their interests converge. Their interests converge. And I think you're now seeing Russia move very slowly, and Russia's learned its lessons of being actively involved in West Asia. And Russia came to the aid of Syria, to the Syrian Arab Republic in 2015. In the fall, October 2015, they intervened and they turned the tide of that conflict that was very much going against the Assad government at the time. And Russia put in a major commitment in terms of its air force and also reinforcing its warm-water port in Tartus.

Geopolitically, the war on terror, from the Russian standpoint, they could see that was a really important battle to fight — that they could wipe out a lot of the terrorist forces there, help Syria, and that would weaken those same Western-backed terror forces that are a threat to the Russian underbelly in the Caucasus, aside from preserving its geopolitical positioning at Tartus. So you could see, but the problem was, the reason this wasn't successful in the long term is because the Syrian army collapsed, the state of Syria collapsed. And it collapsed under sanctions. It collapsed under just general destabilization of a dirty war that was waged against Syria for like 12 or 13 years running. And it led to the collapse of their state.

And the head of state, Bashar al-Assad, fled to Moscow. But Russia couldn't step forward and fight a war on behalf of Syria if Syria itself wasn't able to fight that war. And it couldn't economically prop up Syria, although it tried to make inroads in that direction over the course of decades because of internal politics in Syria. Syria has its own corruption. Syria is also basically vulnerable to all sorts of subterfuge from both the U.S. and Israel, especially in its weakened state. So all of that converged to see the collapse of the Syrian Arab Army and the Syrian government and the state. Russia can't fight that war alone against all of these forces — HTS, Turkey, NATO, Israel — on behalf of Damascus if Damascus can't take the lead.

So Damascus' sovereignty was massively eroded because of sanctions, Caesar sanctions, and repeated airstrikes by the Israelis — over a decade of airstrikes. So that was the lesson of Syria for Russia. Now you have the Iranian delegation arriving in Russia. And what you're seeing there is Vladimir Putin looking at the Iranians, saying, you're fighting this war now. You're still standing. You've defended your sovereignty. You have withstood sanctions. It's different — Iran's much stronger, much more resilient — 47 years of sanctions and threats and attacks and so forth. So this is a very different conversation. So now Russia's probably in a more confident position to aid Iran in certain ways.

And one of those ways, I'm sure, is on intelligence, also satellite data — very, very important. Very, very important, especially with the new range of hypersonic missiles, much of which I don't believe Iran has unveiled, all of its battlefield technology. And this is what I'm going to say to people, Nima,

and I had some close to firsthand knowledge of this when I was in Tehran. A member of the missile program was speaking to journalists, and I was there, present. And he said, you know, we have missiles, high-altitude missiles that can redirect mid-flight and can change direction multiple times and hit moving targets. So I'm sure he was referring to naval vessels in that sense. So in the age of AI, that is just basically, Nima, a question of data.

So the U.S. also has some of this. On the AI side, the technology is being used to track what they call shadow fleets or dark fleets. The U.S. is using this. It's combining radar, AIS data, transponder data, and other positioning techniques. And what it does is synthesize all of this various data to predict the estimated time of arrival of a naval vessel, its heading, speed, positioning — all of that. Weather, all of that comes in. And it can predict movement up to 95% probability. So this data, it's just a question of accumulating enough data to be able to profile U.S. destroyers and aircraft carriers. And the longer they sit and loiter in the Arabian Sea and the Indian Ocean, it does give the Iranians a lot more time to analyze and to prepare.

And it's just, at that point, a software issue in terms of guidance and targeting. And with 95% probability — which the U.S. has these — they use the same systems for different things that they do militarily, mainly for piracy at the moment. But Iran doesn't have a big, clunky navy that they're moving around the planet, so it's not really an issue for Iran. But for America, it is an issue, because the longer they loiter, the more time Iran has to implement types of solutions that would probably really handicap the United States, because they're so reliant on naval power. And in terms of staging, there's no more other than Ben Gurion Airport, Cyprus, and a couple of others — Djibouti, and maybe a base in Saudi — which is also problematic for the Saudis, obviously.

There's not a lot in terms of staging and support from the U.S. because Iran has wiped out a lot of those bases and the ability for those bases to function as military facilities. So that means everything's on naval power at that point. So a couple of clues. One is that we had three carrier strike groups in the region last week. As of the end of last week, the USS Gerald Ford was positioned in the northern Red Sea. To me, that was very likely. That would have been twofold functions — threefold, actually — possibly to provide interceptor defense to protect Saudi's port at Yanbu from the east-west petrol line that bypasses the Persian Gulf.

That's the Saudi lifeline, basically, economically, with the Straits of Hormuz closed. So it would provide that, plus defend Israel against incoming from Iran. So it was positioned to provide protection for that, and also for Houthi from Yemen — any of the Houthis using missiles to target the Eilat port, for instance, or other targets in Israel — they would be in an ideal position to intercept. And then you had the USS George H.W. Bush coming, I believe, around the Cape of Good Hope in South Africa, trying to avoid the Bab al-Mandab Strait. So it's in position, as well as, I believe, the USS Abraham Lincoln strike group. I think that's the third carrier strike group.

And that's on the edge of the Arabian Sea and Indian Ocean. So there were three. Now there's only two. The USS Gerald Ford was recalled this weekend or early this week back to Norfolk, Virginia. So

these would be used as relays, these carrier groups. You've got air refueling for missions. You've got planes that might take off from one carrier and land on another. There's a lot of moving parts because this operation is getting more sophisticated, because the United States does not have the facilities it did before in terms of mounting these attacks. So I would say their margin of error militarily is much less, and also the strike window would also be less.

So you're looking at a two-week campaign whereby they would probably have to expend what they can in terms of standoff munitions in the first week. And they still have to leave reserves for other theaters and for contingency, so they can't use everything. So I would estimate that would be like maybe a week, two max. But then they'd have to go into airstrikes after that. And because their idea is they would take out the remainder of Iran's air defense capabilities and then move in closer with fighter strikes with Israel. And that would be glide bombs and overflights, direct overflights and so forth. But we're still talking about a short campaign. We're talking about a hammer blow, as the White House would call it — two weeks.

And that kind of coincides with the CENTCOM briefing reports that we see, Nima. This is what the president's been briefed on exactly. But the withdrawal of the Gerald Ford, to me, is slightly problematic, potentially. I'm not sure how they would replace that or if they would replace that. So I'm worried about that in terms of this attack, whether that's even feasible from that point of view. So end result, Nima, we can talk about the ins and outs of this. It's a hell of a poker gamble for Trump. And politically, this is it. The longer they wait, the attack could happen, Nima — today or tomorrow, or Saturday or Sunday after the markets close, before the markets open on Monday.

But still a huge political gamble. The longer the delay, the more unsavory this becomes in America, because right now you're seeing a barrage of reports about poor economic performance. GDP numbers have come in way, way below expectations — 2%. And this quarter's will be even lower than 2%, but that won't be reported until the end of next month or the beginning of June. And you're going to see this inevitable downward trajectory of the U.S. economy in the run-up to the midterms. So for Trump, there's limited opportunity here. And I would say the best they can achieve is, they're not going to reopen the Strait of Hormuz. I mean, they could try, but that would come at a huge cost.

One way or another, it would come at a huge cost militarily if it didn't go perfectly correct. So there's not a lot in terms of benefit, potential benefits here, like clear victories. You could declare a Pyrrhic victory, destroying Iran's infrastructure, destroying the civilians. But that Pyrrhic victory, as King Pyrrhus learned in 280 B.C., comes at a massive cost, which is that the more Pyrrhic victories you achieve, the worse your reputation and standing become, and you become weaker strategically. And that was the lesson of many millennia ago, and this is still the lesson today with the Trump administration.

So, but this administration in the U.S. would be happy with a Pyrrhic victory, declare victory somehow, no peace agreement, and just keep the war burning in the background. And the U.S. and

Israel would reserve the option to strike together at any time in the future, as and when they decided to reinvigorate this conflict or not. It depends. But the problem, Nima, with all of this is there's no way you'll get any kind of agreement for any kind of a deal or any kind of peace treaty with this U.S. administration. It's impossible.

In a political climate, there will be no sanctions relief or anything like that from any U.S. government, Democrat or Republican, unless there's some major political crisis in America, you know, some major destabilization event politically in America. Then, you know, the politics might open up enough to say, let's just bring an end to this conflict with Iran. But if that doesn't happen, then, you know, sanctions relief—they could still play the uranium enrichment card. You know, Putin, of course, he's always available. Russia's always available. So that's a reset to the JCPOA, with Russia being the guarantor. But Trump's whole sales pitch is, I have to get a better deal than Obama had.

So the JCPOA won't cut it. A redux of the JCPOA won't be enough for Trump to be able to claim that his deal is better than the deal that he yanked in his first term. So the U.S. and this Trump administration have painted themselves into the worst possible corner. There is really no way out. They're too far into this. They've invested way too much political capital and economic capital, internationally and domestically. It's been a massive failure, this operation, politically, geopolitically. From an imperial point of view, Nima, the U.S.'s reputation has just gone... They're chained to Israel, and that Titanic is going to the bottom. And the U.S., unfortunately, is going with them because of this conflict.

So the more pain you see in Europe, the more economic pain in America and in Southeast Asia, the whole world is going to blame the U.S. and Israel for this. So that's inescapable. So, you know, rescuing it with some gallant military operation that will last two weeks—is that, I mean, is that the best card? Is that the best hand they play? Trump says, I have all the cards, constantly saying, I've got all the, we've got all the, they have no cards. They have cards, but Trump's got a pair of sevens, which will become a pair of jokers in two weeks. And Iran can just sit back. They're not playing poker. Iran's not playing poker. They're playing chess, and they're playing a long-term game because for them it's an existential issue.

But the U.S. doesn't realize it. They don't think it's an existential issue. But in the Pyrrhic victory sense, it is an existential issue for the United States. And I think the die is cast already. Even if they brought it to a close today, signed some miracle deal, you know, Trump sort of, you know, the clouds parted and, you know, Jesus Trump came down from the sky in his doctor's robe—it's too late. You're going to get hyperinflationary forces that are just unavoidable at this point. That's going to push right into 2027. There's no way around it. And it's cataclysmic. And even if it ended now, I don't think the media quite get that. In America, I don't think the White House quite understands that.

I think there's some magic Adam Smith invisible, resilient hand that's going to catch America while it's falling here. But the experts are all basically—the markets, the oil markets for starters, and the inflation rates—it's not looking good. You're seeing a contraction. There's a lot of panic in Washington, especially in this administration. It's trying to blame a lot of this on the Fed because the Fed wants to raise interest rates to try to slow down these inflationary pressures. The Trump administration doesn't want to do that. They want to open up, lower the interest rates, and raise liquidity and all this other stuff. But something's got to give. They're not going to be able to manage this. I'm half thinking this administration is going to attempt some kind of massive bailout as a reaction.

And it could come in different forms. We already saw the U.S. is proposing a bailout for the UAE. So it's like we need to bail out our allies in the Persian Gulf. The UAE is withdrawing from OPEC as well, so that's an interesting development. Those price stabilization mechanisms in terms of the global oil market have kind of been thrown up in the air if the UAE withdraws from OPEC. That's clearly if the United States is potentially behind that. I don't know how that's going to shake out in the long run, but it means that in terms of volatility and price consistency and all of these things—like consistency, volatility—these are major factors in the global economy because you start to see the tightening up of the economy.

If investors and capital don't have clarity in the markets, clarity in where they're going to be putting their money, then there's going to be a contraction in trade, in investment, in all of these things. And if the only safe haven right now is China, where's the capital going? It's going to go to Asia. It's going to see that as a safe haven. And so you're going to see capital leaving the West and going East. And that's been happening for a while, actually. But it's going to accelerate if the U.S. and Europe continue down this suicidal—I would say suicidal—path that they're currently on.