

Escalation: US-Israel Provoking The Next Phase of the War | David T. Pyne

Barely able to supply its troops in the region or keeping them out of harms way, the US has struck again sites in Iran and Israel has been escalating the war against Lebanon. How long will Iran still accept the salami-slicing away of the ceasefire? At the same time, the US media claims 70 ships had been "escorted" secretly through the Strait of Hormuz. Is there any reason to believe this could be the case? David Pyne, Deputy Executive Director of the EMP Task Force, joins me to break down the newest events in the Iran war, failed ceasefire talks, Trump's mixed signals, Israel's influence inside Washington, the MAGA split, China tensions, and Ukraine's slide toward collapse. Pyne argues the U. S. is overextended, running low on war supplies, and facing growing limits in every major theater.

Links: David Pyne Substack The Real War: <https://dpyne.substack.com> X: <https://x.com/AmericaFirstCon> 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.com/shop> Donation: <https://neutralitystudies.com/donate> Timestamps: 00:00:00 Introduction and Iran war update 00:04:24 Limited strikes and ceasefire games 00:08:01 Israel influence on Trump and MAGA 00:13:49 Fallout for Republicans and 2028 00:20:11 China trip and trade theater 00:25:29 Ukraine war and NATO limits 00:32:43 Strait of Hormuz blockade and Iran deal 00:37:01 US bases, nuclear terms, and regime change 00:41:01 US power limits and missile depletion

#Pascal

Welcome back to Neutrality Studies tonight with David Pyne, the Deputy Executive Director of the EMP Task Force. David, welcome back. Hey, Pascal. It's great to be with you. Thanks for coming online. We want to talk about Iran and the assessment from your end on where we stand with these talks about negotiations and the developments after. Today, on my end, it's June the 1st, so we've just completed three months of war. The whole thing started on the 28th of February. Where do we stand, and what do you think the United States is now trying to do on the diplomatic level and military level?

#David T. Pyne

Well, I think that President Trump realizes that this is a war that he's lost. It's shaping up to be a forever war. I think he's been trying to end it reportedly since March 21st, that we know of, according to the New York Times and other sources. He's reportedly desperate to end it. He's sending messages to, you know, the Pakistani intermediaries to Iran that he's wanting to hurry the process. He wants to end the war. And, you know, obviously he has this indefinite ceasefire in place.

Every once in a while he threatens nuclear annihilation against Iran, which he's done on three separate occasions. He threatens to destroy their critical infrastructure. He threatens to have deadlines, and then when the deadline is about to pass, he says, no, we're making serious progress.

So it's any day now we'll have peace. You know, they've accepted our terms. We just need to sign the dotted line. But this is the first time since June 11th, with the in-person negotiations led by J.D. Vance, Vice President Vance on the U.S. side, and President—the Iranians with their foreign minister and their speaker of parliament—where there's actually been some serious progress. And in fact, a deal was concluded between Steve Witkoff on the U.S. end and the Iranians on Tuesday. And on Friday, President Trump had a situation, a meeting in which we have now found out, as of late yesterday, he decided to reject the Iranian offer and to present his own counteroffer, which includes, you know, a toughening of the terms, is the quote that's used, reporting on that.

And essentially what that does is, you know, I believe that the terms that we agreed to, that Iran agreed to on Tuesday, were essentially their best offer, basically their best terms. And we heard today that Iran is responding effectively to, you know, they're providing counteroffer comments to Trump's counteroffer. So negotiations are continuing. Obviously, Iran has many ways to escalate the war that they've chosen not to do. They obviously haven't used any weapons of mass destruction against the U.S. They haven't engaged in massive cyberattacks against the U.S. They haven't used supersonic or hypersonic anti-ship missiles against us. They have terror cells deployed, embedded in the United States.

They haven't activated, so they're playing it cool. They're showing that they're reasonable and restrained. Iran, as Russia, I believe, is essentially a reactive power. It's not an aggressive state like the U.S. or Israel have become. So that's the good news. The good news is there's no sign that the war is going to escalate back to a full-scale war, although what's very unfortunate about this last week is it's the first week since the April 7th ceasefire was announced that there were two different days of limited U.S. military strikes on Iranian targets, not only in terms of missile boats but also in terms of ports and coastal missile defense sites within Iran itself.

#Pascal

I was surprised that Iran didn't outright shoot back. I mean, they did target, I believe, a U.S. base in Qatar, but it's anything but a serious retaliation also, because I think, if I remember correctly, Qatar said that they shot down that incoming drone or missile, whatever it was. Do you think that the United States is trying to salami-slice itself back into a kinetic phase? Also, regarding the current ceasefire under which we operate, the original ceasefire agreement actually expired, but the Iranians are still acting on it. But it should, of course, include Lebanon and Israel. And Israel currently is expanding its war again, not only in the south of Lebanon but also north of the Litani River. And it seems that Iran is just letting that happen. Do you think that there is a connection between these military tactics of trying to do low-level warfare against the other side and see if they let it go?

#David T. Pyne

Well, I think it's really essentially strategic posturing on the part of President Trump. He's trying to look tough during negotiations, trying to show that the U.S. has some kind of cards to play, essentially, but a lot of it's just posturing. I don't think Trump has any intention of restarting the full-scale bombing strikes against Iran. I think that he realizes that our allies' offensive and defensive conventional missile arsenal has been so badly depleted, about 45 percent. You know, Iran's arsenal, according to the CIA report, is down to only 30 percent. They have 70 percent left. We have 55 percent left. So in any resumption of a full-scale war, you know, we're going to run out of missiles before they do. Now, we have smart bombs and other, you know, kind of shorter-range munitions.

But in terms of long-range, precision strike munitions that we need to deter China and Chinese aggression in the Pacific, those would be gone within another six weeks of fighting, essentially. So I think Trump realizes that, you know, going back to a full-scale war is not an option he has on the table. Obviously, a ground invasion would be even worse. It would entail multiple, you know, thousands potentially of U.S. casualties if we were to try to take Kharg Island, for example. And, you know, those are basically no-win situations. But unfortunately, he seems to have a little bit too much confidence that this blockade is going to hurt Iran and make Iran cry uncle and capitulate to U.S. peace demands before it crushes the U.S. economy and global economy.

So, you know, the U.S. allies are pleading with Trump to end the war soon. They don't want a recession in their countries. They obviously don't want a global recession. But there's also domestic political and economic pressure at home, where Trump understands that the longer this war goes on, the more seats the Republicans will lose in both houses of Congress in the November 3rd midterm election. And, you know, gas prices are going to be driven up. They could hit, you know, I think they're about 4.50, 4.55 today. They could be at 5.35 within a matter of weeks. And, you know, the timing is just really bad right before the midterm elections hit. And, you know, all the economic progress he made has been flushed down the toilet in pursuit of this unnecessary and unprovoked war against Iran being fought on behalf of Greater Israel.

#Pascal

What about Israel now? I mean, what's your perception, since you've been watching especially also the Republican Party from very close up, right? And the entire, I mean, first Trump administration, then the intermezzo, and then the current one, and the MAGA movement. Where do we stand in terms of Israel's grip over the U.S.—let's say, at least, it's not just Republicans, it's also the Democrats, actually—it's like, just in general, the influence of Israel inside the U.S. political process? Do you think it increased or decreased over these three months?

#David T. Pyne

I think it's increased. Yeah. I mean, or maybe we just didn't see it. But, you know, three months ago, I would have said that there was a significant portion of Republican members of Congress who were America First, that opposed new wars. And over the last three months, essentially, let's see, 98 percent of Republicans in Congress voted for a blank check for Trump to fight this war against Iran indefinitely. And that was like six different times, seven times in the Senate. And the seventh vote, of course, I think the Senate narrowly passed by one vote, the Iran war resolution. And that vote, I think, is going to happen in the House, I think, tomorrow.

It was delayed because the pro-war Republicans were going to lose that vote by several votes, because there were a lot of neocon Republicans that were out of D.C., away from Congress. So Speaker Mike Johnson, you know, rescheduled it. But essentially, you know, certainly on the Republican side and to a lesser extent on the Democrat side, Israelis have a stranglehold not just over Congress, but over, of course, President Trump as well. And, you know, most of the firings within the administration have been, you know, the resignations. Joe Kent, obviously, he was number five ranked at the Office of the Director of National Intelligence. He resigned. Tulsi Gabbard is being pushed out just next month.

You know, this month for you, on June 30th, is her last day in her position. She's being replaced by a neocon. So essentially what we have is J.D. Vance as the only member of the cabinet that is America First. The America First wing of the Trump administration has been shattered. I used to group Pete Hegseth in the America First wing. He's really come out of the closet as the most radical, war-mongering, you know, neocon supporter of the Iran war in the White House, even more so than Rubio and Ratcliffe. So, yeah, it's a very dismal picture. MAGA essentially has been subjected to a hostile takeover by the neocons, and there's no optimism on my side to believe we can take it back.

#Pascal

So just for everybody to understand, like, America First, that political movement was basically born with Donald Trump's first run for office, right? Back in, that was 2015–16, right?

#David T. Pyne

It was 2016, but he started his run in 2015, yeah.

#Pascal

Yeah, he started in 2015 and dug that out and basically with that galvanized at least the anti-war side of the Republican Party, right, and also managed to get a lot of support from other quarters. And so, in your assessment, this part of his supporter base is probably gone, right?

#David T. Pyne

Well, it's still there. Eighty percent of the people that brand themselves as MAGA are still with the president, and they're flip-flopping with him. So as he's flip-flopped from a courageous America First conservative peace president to a crazed neocon war-mongering president, they flip with him. But he's lost 20 percent of the Trump voters, roughly about 16 to 17 million voters that voted for him just in November, you know, 18 months ago, November 2022, have stopped supporting him and come out in full opposition against the war. So, yeah, he's still got 80 percent support. Historically, that's his lowest ever Republican level of support during his entire presidency.

So he's experiencing the lowest poll numbers, essentially, you know, lower than after January 6th. He's in the 30s. RealClearPolitics average is the U.S. polling, you know, best pollster in the country. It's an average of polls, shows him at 39%. So that's going to drag down Republicans. I mean, we're at like a 7.5% deficit in the RealClearPolitics congressional polling average. So that's, I mean, that's a guaranteed takeover by the Democrats of both the House and Senate. The Senate, I think, is going to be narrow, about four to five, probably five seats, I would say. And then the House is probably going to be twenty-five to thirty seats. But that's a disaster.

You know, that's just a massive political disaster. And I think this is just the beginning. I think 2028 will be just as bad. And I think we'll lose the White House. And I think the reason is, the Republicans won the 2024 election on the basis that they were the party of peace and prosperity. Now they have to run as the party of war and economic failure. And the Democrats are able to, you know, steal the mantle from them as the party of peace and prosperity. Obviously, they're not going to make things more prosperous, but they certainly can end the war, you know, with the takeover of Congress and defunding it. I think Americans are going to vote for them in wide majorities.

#Pascal

But do you think they will? Because the one thing that seems to unite the two parties is the desire to... the desire to defeat China and certainly Iran. I mean, also looking at the funding of AIPAC and how that is going to both parties, do you think that when it comes to the Iran war, a takeover by the Democrats of Congress in November will make a significant difference? Will it... will it do anything more than just dent the president's ability to kind of basically throw out any proposition he wants and know that it will be backed up by Congress?

#David T. Pyne

Yeah. I mean, obviously, the president's agenda is going to be entirely torpedoed after the Democrats take over both houses of Congress in January. So his agenda will be over. It'll be finished. He'll have to rule by, you know, by the pen, essentially, as it was famously said about Obama with executive orders. You know, he's already focused on foreign policy. Typically, presidents that lose control of Congress kind of steer away from a focus on domestic policy, where it's clear their agenda gets defeated, and they focus on foreign policy and try to be successful from that standpoint. Trump has been a disaster in foreign policy. His foreign policy is arguably worse than

Obama's or Biden's from my standpoint, in terms of putting America last, starting all these forever wars, two regime change wars, another war in Yemen that was lost.

The war in Venezuela really didn't do anything. You know, the communists still control Venezuela. They're still allied with Russia and China. We're investing more money, I guess, in their oil business. So that really wasn't a success. And now it's Trump's plan to go to Cuba and has, you know, a carrier strike group around Cuba with 2,500 Marines ready to land and conduct another snatch and grab of Cuba's president, perhaps their former president, Raul Castro, you know, who is indicted on these trumped-up, you know, claims that he was responsible for murdering Americans decades ago. That may or may not be true, but he's 94, and that's, you know, just a ridiculous charge. But he's really behaving, you know, like just an international bullying aggressor. And, you know, it's not something that real America First principled conservatives are going to support.

#Pascal

What do you think that does now in the United States? Because all of these principled, peace-oriented America First, the electorate, these 16, 17 million people that you were talking about, where do you think they will go? Because they would have a tough time actually voting for Democrats, I suppose. Or do you think that people like—wait, now I need to think—no, Massey was a conservative too, right? He's a conservative too. He's a Republican too. But where does—I mean, that's now a big voter base, right? That's kind of floating out in nowhere land. And there are some people who are talking actually about Tucker Carlson, right? Maybe being able to galvanize that together again. Do you have any clues about where this might be going?

#David T. Pyne

Yeah, I mean, in 2020, if J.D. Vance was the nominee, I think Vance could bring them back because, you know, Vance, you know, it's well articulated in media reports that he was totally against the war, even though he's publicly supportive. He's been privately, you know, very much against the war in Iran, very supportive of ending the war, you know, with compromised peace terms, unlike President Trump, who wants nothing less than Iranian surrender. So I think Vance could put it back together. Rand Paul, I mean, he has the conservative principles, but he's just not charismatic at all. I met him. He just never smiles. You know, he ran for president. He got about 10 or 11 percent against President Trump, and that was kind of his ceiling.

He never—he doesn't really have much potential. Massey, he's great too, but I just don't think he has that much national appeal. So it's really between J.D. Vance or Tucker Carlson. J.D. Vance obviously is still the frontrunner, but much more narrowly. What we call the deep state neocons here in the U.S. are really pushing Marco Rubio very hard. Marco Rubio is someone who's so deep-stated and so established—when he got, I think, 100 votes, I think he got unanimous support when he was

confirmed by the U.S. Senate for Secretary of State. So he's someone that is viewed as kind of a moderate. And he is a moderate in terms of, I guess, mainstream, you know, neocon, neoliberal, neo-imperialist-type foreign policy.

And so I think there's a very strong chance that Trump is going to endorse Rubio over Vance, perhaps even campaign against Vance in support of Rubio, because Trump's mind has just completely changed from being, you know, really opposed to all these forever wars, neocon wars, to being very much a proponent of them. And basically, he's come over to Marco Rubio's side, you know, because Rubio's never changed. He's always been a neocon war monger. He's not America First at all. And yet, because President Trump has shifted to the neocon side, you know, it seems people are attempting to make a credible argument that Rubio is now America First because he's now in line with Trump, when in fact, it's Trump that turned to Rubio's position.

#Pascal

Yeah, it's America First that was squeezed into a neocon outfit, right? So it's now basically an equal thing, not the other way around. So what did you make of Trump's visit to China and him basically making this a trade event with all of the—what was it—16, 17 CEOs, including Tim Cook and so on, and basically everybody just going there to snap a couple of pictures and apparently look at the ceiling of the Great Hall of the People and so on? It was kind of a—I called it the most interesting nothing burger of the year because nothing came out of it, but it was still interesting to watch and see that this is how the meeting of these two titans went down. What was your impression?

#David T. Pyne

Well, to me, it was President Trump essentially going to Beijing to appease Xi Jinping. But really, interestingly, he kind of turned his whole position from trying to decouple the U.S. economy from China into—now he's trying to integrate. He had, again, as you mentioned, 16 different billionaire CEOs, multimillionaire CEOs that he brought with him to try to invest in China and get China to invest a trillion dollars in the U.S., and maybe build some electric car factories to put U.S. car companies out of business or take away a lot of jobs from them.

And, uh, essentially create jobs which are, you know, controlled by communist China. I mean, it's just, uh, again, it's the polar opposite of who he ran as. He ran on the whole Liberation Day of April 2nd, 2025, with all the tariffs. That was really when he said Liberation Day, he meant China—he meant liberating our economy from China. And now he's trying to integrate our economy with China. We have, um, 500,000 students in U.S. universities that are Chinese, and all of them are espionage risks. He has, you know, we have 236,000 acres of Chinese-owned farmland here in the United States by 17 key U.S. military bases.

And Trump basically said he's all for it. You know, he doesn't see an issue with China owning strategic land near U.S. military bases or having half a million potential Chinese spies in the country.

And so, essentially, it seems that he's become very desperate. He wants China to, you know, pull us out of a potential recession with these trade deals that he himself has created, with this foolish war against Iran that's, you know, pushing the U.S. economy into recession, the global economy into recession. But if you look at the joint communiqué—it was called the joint communiqué by the White House—it was never a joint communiqué.

On the Chinese side, they didn't publish any of the nine or ten points that Trump listed. So it's like he just pulled them out of a hat and ordered the administration folks to claim it was true, it was legit, when in fact it's false. You know, a few of them were likely verbal promises. He claims that China agreed to buy 200 Boeing passenger jets. That may be true in terms of a verbal agreement, but there's no written agreement. And we know in the past that those have fallen through. And then, of course, there were the soybeans and all kinds of stuff like that. You know, China just can't be trusted to keep its agreements when it comes to trade. It's proven that.

And so he also claimed that China said that Iran can never have any nuclear weapons. They clearly never said that. Well, the one thing that China did say is they support a peaceful resolution of the war in Iran, but not on U.S. terms. You know, they support their ally. Obviously, Iran is a Chinese military ally. And then Trump also claimed that Xi committed that China would suspend all further arms deliveries to Iran. And we know for a fact that they're not going to do that. So yeah, the whole trip was basically, you know, it was just a propaganda trip, essentially, on the U.S. side, and, you know, with really nothing to show for it, as you mentioned, a big nothing burger.

#Pascal

Yeah, it's just, it's very difficult to read where we are at the moment, right? In these three theaters that we have now, right? We have the Chinese theater, or the Pacific theater, which from my perspective at the moment is still as calm as it used to be, but that could be the calm before the storm. We have, of course, the hot war, direct U.S.-Israel against Iran and the entire region, basically. I mean, what's happening in Lebanon, too, and the genocide that's still unfolding in Gaza is also still ongoing. And all of that is part and parcel of one kind of approach.

And then we, of course, have the Ukraine proxy war, which the longer it goes on, the less proxy it looks. And the Russians are saying out loud now, guys, we're not going to take it anymore. All of these drones are striking our capital and our cities, and we know that they're manufactured in Europe and then assembled in Ukraine. And you're even obviously thinking now about launching these things from outside of Ukraine. At least that's the claim the Russians make. Do you have any insights on that theater, where you see the U.S. strategy on that at the moment, if there is a strategy?

#David T. Pyne

Yeah, I mean, Trump really doesn't have a strategy. His strategy is to keep fighting the war against Russia in Ukraine—Biden's war, essentially—with less U.S. military arms and supplies. So we're providing about \$12 billion a year in arms to NATO, which are then transferred to Ukraine. So, uh, it's kind of stupid that President Trump was pretending not to supply Ukraine with arms when everyone knows that he is, just, uh, you know, less. Obviously, that's about 20% of what Biden provided, I think, in 2024. And, uh, you know, Ukraine is running out of troops. As I've been saying, uh, you know, Ukraine has four times fewer troops in Ukraine than Russia does, according to their military commander. In September of 2025, he said it was 3-to-1; it's 6-to-1 in some areas.

And that's not just troops. It's artillery, it's weapon systems, tanks, armored vehicles—right across the board. He said it was 3-to-1, and I assess it's probably 4-to-1 because Russia has been, you know, inflicting 4.5 times more casualties on Ukrainian troops than Ukrainian troops have inflicted on Russian troops. So there's this huge disparity where Ukraine has lost troops—essentially a million troops killed in action and another million seriously wounded, unable to return to the front. So their army, by my estimates, is probably down to about 150,000 troops. So their brigades are about 30 to 50 percent of end strength right now. And...

Essentially, the situation is there's a 2,000-kilometer border between Russia and Ukraine, but only the southern 1,000 miles are really being hotly contested right now. So essentially, if there was a major Russian offensive in the north, as even Ukrainian President Zelensky has stated, out of Belarus, if they were to reinvade Kyiv Oblast, they could, you know, with as little as 200,000 troops, but probably closer to 300 or 350,000 troops, easily surround Kyiv and knock Ukraine out of the war within a month's time. So that is a decision that, according to my Russian sources, President Putin is loath to take, because he reportedly does fear that NATO could intervene in the war directly, and he doesn't want to risk that.

He also doesn't want to upset President Trump, because Putin is very sincere in forming this geostrategic economic partnership between the Russian Federation and the United States. He knows that Trump wants that. Trump just doesn't have the political courage to pressure Zelensky to support a peace deal that's negotiated between the U.S. and Russia because he's surrounded by neocons and he listens to our EU partner states, all of which are essentially neo-imperialists and neoliberals. So I think that's the situation. I think Ukraine is likely to suffer a military collapse probably by October or November, which will essentially force Zelensky to capitulate to Russia.

#Pascal

There are several people around me who've been observing the Ukraine proxy war now for four years, and a lot of them are getting anxious that we might be at the brink of a Europeanization of the Ukraine war, and that the enlargement is actually part of what even maybe the United States would welcome — of then using the entirety of Western Europe basically as a launching ground for strikes against Russia, even at the cost of cities like Warsaw and so on being bombed by the

Russians. But how would it be different from having Kyiv bombed? How do you see that? And maybe what's the perception at the moment within the circle of conservatives you can observe about the Europeans? How are the Europeans seen inside conservative circles in the U.S.?

#David T. Pyne

Well, I think President Trump has, you know, voiced the concern of conservatives that, you know, they're not backing NATO. We don't have a single NATO partner state that's, you know, helped us out during the Iran war. And to me, that's very legitimate because it's an unprovoked war of aggression, and every European country can see that. So they're loath to support that. And number two, you know, the U.S. Navy, the mightiest conventional naval force on the planet, is unable to dislodge Iran from control straight up through the Persian Gulf. So why send, you know, some European Navy frigates to Iran to try to help do the impossible? So there's just no reason that NATO countries should be supporting us. But NATO countries—reportedly 66% of their citizens—view the U.S. as a greater security threat than even the Russian Federation, which is quite astounding.

And there was talk, you know, as recently as last month, even in neocon circles, that the U.S. might pull out of NATO, that that might be a good thing, maybe form a new mini-NATO consisting of the U.S. and Eastern European countries like Poland, Romania, and the Baltic states, which are viewed to be, you know, meeting their targets in terms of, you know, 5% of GDP military spending, and are less critical of the U.S. war against Iran. So I think in terms of our NATO alliance, there's been a temporary pullback, I guess, of 5,000 troops from Germany. It looks like those troops may be redeployed into Poland. So it's kind of a net zero. But I think that President Trump has no desire for war with Russia. I think he's very dead set against war with Russia or China.

He's made statements that he would not support Taiwan if China were to invade Taiwan or blockade Taiwan, at least not militarily. I think he's even more focused on, or at least equally focused on, avoiding war with Russia over Ukraine. So if it looked like Russia was going to take Kyiv, or if they had an offensive that reached the Dnipro River, you know, a broad front, I think Trump would stay out and say, yeah, look, if Britain and France, you guys want to, you know, send troops to fight Russia or Kyiv or simply guard the Dnipro River line, don't count on U.S. support because there won't be any. So I think European NATO leaders need to realize that if they provoke a war with Russia, the U.S. will not stand with them based on my assessment of what Trump would do.

#Pascal

Now, just to go back to Iran, we still see this geoeconomic way of implementing warfare on both sides, right? The Iranians blocking any kind of enemy shipment through the Strait, and on the other hand, the United States imposing an extended blockade by trying to say no Iranian ships or allied ships can go through there. How do you read that?

There was an article this morning in the New York Times that surprised me because it said, based upon anonymous sources that never speak on anything official, but we are just supposed to believe that the New York Times has links to the best sources in Washington. And the sources claim that the United States escorted up to 70 ships secretly, sneakily, through the Strait of Hormuz, and that these ships were escorted along probably the Omani coast, that they turned off their transponders so the Iranians wouldn't notice them, because apparently if you don't have a transponder, then the Iranians are blindsided. Sorry, it's just such a weird way of putting things. Anyhow, but that's what they wrote. Is there, in your mind, any reason to believe that maybe something like this was going on and that the U.S. is trying to secretly sneak ships through, if that's possible? What do you make of this story?

#David T. Pyne

Well, I think, first of all, Trump's decision to blockade the blockade, which he enacted on April 13th, has been self-defeating. The IMF has assessed that Iran's economy will likely decrease by about 6.1% in terms of economic shrinkage by the end of the year. But by way of comparison, Ukraine's economy shrank by 30% of GDP in the first year of the Ukraine war, and they're still fighting four years later. Germany, during World War I, was knocked out of the war by the British blockade. They suffered about a 33% contraction of their economy between 1914 and 1918. So basically what I'm saying is Iran would have to lose about a third of its economy to even come close to considering capitulating to maximalist U.S. peace terms. But the issue is, Iran is not fighting a war of choice.

They're fighting an existential war of self-defense, for their very existence, a war for independence, because essentially what this war is about—it's not about the nuclear weapons. It's about the U.S. It's a war of imperialism, imperial domination and control by the U.S. and Israel over Iran, because Trump made it clear what he was fighting for. What he's fighting for is not to liberate the Iranian people from their Islamist regime. He's fighting to essentially subject them, to be able to handpick Iran's new leaders without any democratic input from the Iranian people, as well as to take control of their oil. So essentially, the plan all along was to, you know, overthrow the regime, replace it with a pro-U.S., pro-Israeli regime in Tehran, and then, you know, sign oil deals with them, essentially make them U.S. and Israeli allies, or a vassal state.

And, uh, that was quickly defeated, uh, despite the fact that, you know, Trump supporters were telling me as late as weeks after the war started that, uh, Iran had been liberated because that's what they had been told by the White House — that as soon as, uh, Khamenei, you know, Ali Khamenei, was assassinated, the supreme leader of Iran, that suddenly Iran was liberated. And since we found out that the IRGC is in substantial control of the Iranian government and Iran, Mojtaba Khamenei is a hardliner, more hardline than his father. So essentially, we've had regime change, but we've had a regime change in the wrong direction — to a more hardline regime that's more opposed to the U.S. and Israel and more willing to consider using weapons of mass destruction against the U.S. if we decide to re-escalate the war.

#Pascal

Do you think that there's a future for the U.S. bases in the Middle East, especially the ones that have been blown up to quite some extent? My Iranian sources, first and foremost Professor Mohammad Marandi, keep saying that the only way this will end from the Iranian side is with a complete U.S. troop withdrawal from the region. They will not accept anything less, because if these bases remain, then the U.S. will always maintain the capacity to just strike on another day. And the Iranians, at least according to Marandi, are willing to see this through and force the exit of the U.S. Do you think that that is a realistic goal from the Iranian side?

#David T. Pyne

I think it is fairly realistic. I think that Trump is going to be, whether it's this week or whether it's months from now or even years from now, I think ultimately President Trump—the only way this war is going to end, there are two possible ways. He can pull U.S. forces out of the region, sign just what I call a skinny deal where the U.S. agrees to drop the blockade in exchange for Iran reopening the strait. In very simple terms, we pull our forces out of the Persian Gulf region. And that's one way. Or you can do a more comprehensive peace deal, which is what he's been trying to do this week, where we had a one-page MOU with 14 different points. And Trump is claiming that, you know, the nuclear part of the 14 points is very extensive.

You know, how extensive could it be? I think the JCPOA was like 220 pages, something like that. And it was entirely devoted to one thing, which is Iran's nuclear program. It actually, you know, made a difference. Iran gave up 25,000 pounds of its ore, essentially 97 percent of its known enriched uranium stockpile, and, you know, didn't have highly enriched uranium that we were aware of. And then Trump killed that deal, and suddenly they have a thousand pounds of highly enriched uranium, you know, it's almost weapons-grade, 60–80 percent enriched uranium. But essentially, what I've heard is that Iran is willing to dilute that highly enriched uranium to a low-enriched uranium level of 3.6 percent or below.

They're willing to have a suspension of enrichment for up to 10 years. And to me, that could be spun as a win, you know. Obviously, there are other provisions like the \$300 billion Reconstruction Fund that I think is highly embarrassing and looks really bad from the U.S. side. It looks like appeasement. Maybe we could take that out. Unfreezing some of their funds, I think that's very reasonable. It's their money to start out with. You know, they deserve part of it back. You know, they have \$120 billion in total in frozen financial assets. You know, they reportedly only want \$12 billion of it back at the onset of the 60-day ceasefire agreement.

But the other thing is, this ceasefire agreement, it's not really a peace treaty, although it has some of the terms you would associate with a comprehensive peace treaty. It's just a framework agreement, and it's likely non-binding, so both sides can wiggle out of it. There should be no reason

why Trump can't accept a deal, because even if he were to get Iran to agree to tougher terms or a better deal from his perspective on the nuclear deal, there's really no way to enforce the agreement that would cause Iran to act against its interest and comply with those terms. So I think he's better off negotiating an agreement which Iran supports, that they don't feel unduly pressured into, because there's a much higher chance that they will honor such an agreement.

#Pascal

Yeah, I do wonder what the actual goals from the U.S. side are because, I mean, at this point we have seen a president, and it wasn't just Trump. It was also other people before him, other presidents, and also other congresses who, just whenever it pleased the United States, would just ignore that. I mean, most importantly, when it comes to this war with Iran, you ignore the provision that you are not allowed to do a war of aggression, right, against other states. That's like a cardinal sin under the UN Charter.

And it is a cardinal sin, which the West has been berating Russia for, for the last four years. But we see how on the American side, this is just on the card. So what I wonder is, why put so much effort into a piece of paper, which at the end of the day, everybody in the West understands is just that? If Trump wakes up and says, like, no, we're not following this anymore, we continue bombing, he will. So what's the game about? What's the diplomatic machinations about? Is it more just about also not losing face toward his own base? How do you see it?

#David T. Pyne

That's exactly right. Yeah, Trump wants—he understands that this was a defeat, a strategic defeat for the United States—but he wants to spin it as a victory. And he can spin it as a victory because 80% of his Trump voters will pretty much believe whatever he says when it comes to whether the U. S. won the war against Iran. So he's trying to put tougher terms, not necessarily because it favors U. S. national security, but because it makes him look like a winner. Everything is—it's all about—it's not about substance, it's about image. He's a very image-driven U.S. leader. It's all, you know, he publishes all these different AI-generated pictures of himself, whether he's a Roman emperor or Jesus Christ himself.

I mean, he's just kind of a crazy leader, you know, and he's really just an extreme narcissist. He's got a huge ego, and if it doesn't make him look good, then he's gonna keep fighting the war for as long as he possibly can, possibly till the end of his presidency, but most likely until, you know, after the midterms, after Democrats take control of both houses of Congress. So the U.S. is in a very bad position. We're being hurt economically with the pending economic recession. Militarily, we're losing essentially our ability to perform as a conventional military superpower, because if we don't have missiles in the launch tubes—vertical launch tubes—on our Aegis destroyers and cruisers, or Tomahawks, or various other precision strike munitions, if we were to get into war with Russia or China, we'd simply run out of ammo.

And as we've seen, this war with Iran, as well as the war in Ukraine, has demonstrated that, you know, logistics matter almost as much as the number of weapon systems. If you can't rebuild the munitions and the ammunition you use up, you're going to lose the war. You're going to lose the war of attrition. And that's what we're facing. You know, we're fighting Iran, which is essentially a secondary great power. It's not even, you know, a first-line superpower or a great power. And we're losing. So, you know, this has essentially been an air and naval war.

And if we can't beat Iran, which—essentially, we've sunk all 11 of their major surface combatants and a few of their submarines—there's a 0.0% chance we'll be able to defeat the PLA Navy, you know, China, which has the largest army, the largest navy, the largest air force, the largest coast guard, the largest nuclear-capable ballistic missile force in the world, in their own home turf, their own backyard. As Trump said, there's no way that we could win a war against China because Taiwan's basically 80 times closer to China than it is to the U.S. Pacific coast.

#Pascal

I wonder when the neocons realize that. I wonder when they will finally look at the map. And, you know, when it comes to Taiwan, what makes me the most anxious about—not anxious, angry about—this argument that China is about to invade is like, look at Kinmen and Matsu. Look at where these things are. And then look at... just realize that China simply accepts the current status quo and that at the moment things are fine. Anyhow, maybe the very last thing.

From what you said, which I think is the state of affairs, the kinetic realities depend upon the economic realities, and the economic realities are not able at the moment to supply the U.S. war machine anymore, apparently, which is a huge surprise. I always thought the U.S. ability to produce implements of war was basically infinite. It's not. Do you think this is now actually being recognized also in neocon quarters, that this has to be factored in? Because we've had that essay by Robert Kagan, who's basically the pope of the neocons, who said, like, we lost this, etc. Might this lead to a change in the thinking of this belligerent part of the U.S.?

#David T. Pyne

Yeah, I mean, there is a faction of the neocons that at least are realistic on that level. They remain hardened neocon imperialists, but they understand that there are limitations to the U.S. in terms of our military-industrial capability to mass-produce or replenish these missiles, which, according to a CSIS report, would take five years to fully replenish. So we have a five-year deficit to replace the missiles we've used up in just 38 days of high-intensity combat against Iran—let alone if this war had been continuing to day 92, which is what it is today—we wouldn't have any left, essentially. It would take 10 to 12 years to replenish them.

And as I discussed during a recent interview with Mario Nawfal on his X program, essentially, China has 35% to 40% of the world's total industrial manufacturing capability, which is over three times

more than the United States. But in terms of a defense industrial base, they could produce advanced weapons systems five to six times faster than us, and they could do so independently. So with U.S. weapons systems, there are multiple, perhaps a couple dozen, Chinese critical components that we use to produce advanced munitions. Half of those can be supplied from other sources that are more expensive, but the other half would take perhaps two to three years to find other sources for.

So if China wants to cripple our weapons production, they have the ability to do that just by blocking shipments of those critical components and raw materials to the United States. So, you know, they have the ability to prevent us from rebuilding even the weapons that we've depleted. So instead of five years, it could be eight years if China decides to do that. And that's another reason why we could not fight a war of attrition against China and have any hope of winning, because they control so many of our critical components for advanced weapons systems.

#Pascal

Yep, yep. The ability to produce is fading away. We'll see where this leads. David, people who want to follow your work, where should they go?

#David T. Pyne

Yeah, your viewers can go to the Real War Substack, which is at dpyne.substack.com. Once again, dpyne.substack.com. You can also follow me on X, where my handle is @AmericaFirstCon. See you on the handle.

#Pascal

I will put the links to all of your profiles in the description box below. David Pyne, thank you so much for your time today.

#David T. Pyne

Thanks, Pascal. Always a pleasure.