

# David Pyne: Iran Attacks Kuwait and Bahrain

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## #Nima

Hi, everybody. Today's Wednesday, June 3rd, 2026, and our dear friend David Pyne is here with us. Welcome back, David.

## #David

Hey Nima, great to be back with you.

## #Nima

Last time we talked, it was all about negotiations and talks between the two sides. And today we're talking about, just moments ago, last night, we saw a new confrontation between the United States and Iran. The U.S. hit an oil tanker in the Persian Gulf, and the Iranian response was on Kuwait and Bahrain. They hit some targets at American bases in these two countries and the airport in Kuwait. And the other point is the situation with Israel, which is getting so complicated between Israel and Lebanon. How do you see it? Where are we headed right now with the case of Iran and the United States, the Persian Gulf, and Israel? How do you see it?

## #David

Well, I was asked about this a little over a week ago by Mario Nawfal on his X podcast, and I predicted that this war will likely continue indefinitely. Certainly, it's likely to continue past the November elections here in the United States. And, you know, the events of this past week or week and a half have pretty much shown that to be the most likely possibility because, you know, President Trump has ordered the bombing of southern Iran. In five of the last nine days, we've been bombing Iran. And, of course, Iran has retaliated with strikes against both U.S. military bases in Kuwait and Bahrain. And Israel has started this, you know, terrible offensive in Lebanon.

Despite the fact that there was a ceasefire negotiated, they've resumed the offensive. They've had intermittent bombings of Beirut. Trump received a message from Iran that all peace talks had been

suspended, and he reacted by calling Netanyahu and having a very profane conversation in which he expressed his anger against Netanyahu for blowing up the ceasefire talks in opposition to Trump's foreign policy, violating ceasefires both in Gaza and Lebanon, where Israeli forces have been ordered to surge to retake over 70% of Gaza's territory, despite the fact that the ceasefire agreement only allows them to occupy 55%. So at this point, peace talks—I think they're dead.

President Trump gave an interview that was published this morning, and I think it was with the New York Post, and he stated that his relations with Iran's new Supreme Leader, Muqtaba Khomeini, are very good and that he looks forward to meeting the Iranian Supreme Leader in the near future. This is signaling desperation on the part of President Trump to try, you know, essentially begging Iran to restart the peace talks. Trump, of course, is claiming that, you know, great progress is being made in the peace talks, despite the fact that they're nonexistent, you know, for the Iranian side. So there's, you know, continues to be a lot of speculation, a lot of lies and misleading statements on the part of the White House. But essentially, you know, peace negotiations are currently dead in my estimation.

## **#Nima**

I think what Donald Trump is pointing out concerning the war with Iran is, when he talks about the mainstream media in the United States attacking him, we know there's this sort of internal fight between Democrats and Republicans. But there is some sort of reality with these reports. And what are the achievements of the war so far for the United States? And what were the objectives for Donald Trump himself? He said in the same interview that you mentioned, he said that he started it. People are trying to say that Benjamin Netanyahu convinced him, but he started the war because if he didn't start the war, there would be no Israel and Iran would wipe out Israel. Why does he need to go that far?

## **#David**

You know, I'm writing a really interesting article I think your viewers will find of extreme interest. Essentially, it talks about this very issue. So President Trump declared on February 14th that Iran's nuclear program remains completely and totally obliterated. Two weeks later, he invaded Iran, and on March 4th, which was 18 days after he said Iran's nuclear program was obliterated, he said the reason he invaded Iran is because they were just two weeks away from building nuclear weapons. And on that day, and many, many times since, including in his interview, he claimed that he had saved Israel from a nuclear apocalypse and that if he hadn't attacked Iran, Israel would not exist today. That is just simply false.

The U.S. intelligence has determined that the U.S. was unsuccessful in destroying even one of Iran's 1,000-pound highly enriched uranium stockpile. It assessed that essentially U.S. and Israeli bombing strikes have largely left Iran's nuclear production facilities untouched. What this means is that Trump is completely wrong — that if Iran's nuclear program is untouched by U.S. bombing strikes, then

Iran could have nuked Israel after he invaded, or rather after he bombed Iran. And, of course, they haven't. So there's actually three possibilities. We know that Iran has had the capability to build nuclear weapons since 2003. So the first possibility is they're a peace-loving country that will adhere to the fatwa issued by Supreme Leader Ali Khamenei that they would not build nukes, or rather would not use nuclear weapons against civilians.

The second possibility is that they do have a modest nuclear arsenal, but they are a responsible nuclear power and have committed to never use it, except if the regime is about to be overthrown or Iran is invaded by a foreign power. And the third possibility, which is being floated by our friend Larry Johnson, who I've interviewed on this show one time—he's a former CIA analyst and others—is that Iran did not have a nuclear weapon before this war began, but they have since mass-produced one or more nuclear weapons recently in their underground facilities and now are threatening to test it to restore deterrence with the U.S. and Israel.

## **#Nima**

Benjamin Netanyahu today said that the only reason for this war is that they want to protect the United States. He says the American people should be protected, incredibly grateful to Israel when we fight Iran and its proxies. We are not just fighting for Israel, we're fighting for you. David, as an American, looking at the Middle East, looking at the chaos this war has created, many people were talking about it. There is no necessity for having a new war in the Middle East because they had Iraq, Afghanistan, and many people knew what would happen.

And Iran is not Iraq or Afghanistan. They knew the capabilities of the Iranians. Iranians were talking. I, on this podcast, was talking with Iranians, and they said they're going to do the same as they've done so far. They're going to close the Strait of Hormuz. They're going to hit American bases and GCC countries. But nobody seemed to care about what they were talking about. Then the attack came. And Netanyahu is arguing that this fight is not just for Israel, it's for Americans. What sort of threat would Iran pose against the United States? Why would they need to attack the United States?

## **#David**

Well, you know, your viewers need to understand that threat is measured by both intent and capabilities. So Iran has had the capability to catastrophically attack the United States for many years with either nuclear weapons, super-EMP satellites, a massive cyberattack, or terrorist strikes. I think that's a fairly minimal threat to the United States in terms of its sleeper terror cells in the U.S. being activated. They also have the capability to sink U.S. warships with supersonic and hypersonic missiles. And they've done none of these things, even after we killed their first family, we murdered their first family.

You know, we killed 50 top Iranian leaders in a dishonorable sneak attack when Iran had gone out of their way to offer the hand of peace and never attacked the United States directly. And so what

this proves is that Iran is a reactive power in that they do not attack other countries unless they're first attacked, number one. They're a responsible, rational power, but also that, you know, they really are a restrained power because they have these five areas where they could escalate the war against the United States, cause massive damage either to our warships or to our critical infrastructure, and they've chosen not to.

So, Iran is acting in the interest of restoring peace. You know, they do have some peace demands that the U.S. doesn't like that clearly would suggest that they are the victors in this war, and that's why President Trump has refused to sign a peace deal based on their peace terms. But the truth is that they are the victors in this war because, in a war, you know, the country that is left in control of the territory in dispute, or the body of water in dispute—in this case, the Persian Gulf and the Strait of Hormuz—is widely considered to be the victor.

And the U.S. Navy has no, you know, the mightiest conventional navy in the world has no ability to overturn Iranian control of the Strait of Hormuz. So that's something that's going to continue. This war has catapulted Iran into the ranks of, you know, the regional hegemons of the world. They control the Persian Gulf region, and that's something that they didn't openly control before. So U.S. military strikes have been surprisingly ineffective. I think we destroyed about 15 to 16% of their missile and drone capabilities, and they used another 14 to 15% of those. They have 90% of their underground missile production facilities and missile launch facilities that are still operational.

91% of their coastal defense anti-ship missile sites are operational. You know, we only sunk about 5% of their ships. Granted, the most important ones are at the bottom of the sea. Their 11 major surface combatants were all sunk, but they still have thousands of fast missile boats that the IRGC is using to, you know, control and blockade the Strait of Hormuz. And they also have two-thirds of their air force intact and 100% of their army and 100% of their nuclear capabilities. So this war has been, again, it's been surprisingly ineffective on the U.S. side, and Trump needs to take immediate action to end it.

## **#Nima**

Do you think that Donald Trump would be able to—you mentioned the phone call between the two, Donald Trump and Benjamin Netanyahu. We know that Donald Trump wants to get out of it, but the problem is that there is no face-saving condition for him. And it doesn't seem that Benjamin Netanyahu is willing to help him, nor Benjamin Netanyahu or Iran. Iran is not behaving in a way that helps him save face and get out of the region. What is the off-ramp for the United States, for Donald Trump and his administration at this particular moment?

## **#David**

Well, the easiest off-ramp would have been to sign the peace agreement that Steve Witkoff negotiated with Iran. It was on his desk for three days, from Tuesday last week to Friday, before he

rejected it. That agreement was a 14-point MOU, a 60-day ceasefire agreement, and it had a couple of face-saving provisions in it. It said that Iran committed to either never build a nuclear weapon or suspend its nuclear program. It offered to dilute its highly enriched uranium—all of it—so, to our knowledge, it would have no remaining highly enriched uranium in the country. And then it also reportedly offered a 10-year moratorium on Iran's nuclear enrichment.

So they would get to keep all of their 22,000 pounds of low-enriched uranium, which they could use to power their nuclear reactors during the 10 years they didn't enrich. But he could have credibly claimed that as a victory. And instead of accepting that and spinning it as a victory, which he could have done because his MAGA supporters believe anything he says, whether it's true or not, he decided to issue a counteroffer to Iran, which essentially insisted on his three most maximalist demands. And Iran has now responded by rejecting that offer. So Trump had an easy exit that he could have pursued. He chose not to. And peace talks are now dead, and he's kind of flailing around trying to restore peace talks.

And probably is having remorse that he didn't accept the peace deal that was on the table, because the U.S. economy is going to be in recession by, I think, by September if this blockade is not ended—the U.S. Navy's blockade and, of course, Iran's blockade of the Strait as well. So he needs to open the Strait. And really, the best way to do that at this point is very simple. He simply goes to Iran and says, look, I know your number one priority or objective is for a U.S. withdrawal from the Persian Gulf region of its military forces. I'm willing to do that. I'm going to pull our troops and our ships away from a distance of Iran of, you know, hundreds of miles. And we're going to end the blockade. In return, I need you to reopen the Strait.

You know, don't call it a toll fee, but you can charge some kind of environmental maintenance fee for your ships, you know, to save face on your end. And that would be the end of it. The war would end. There wouldn't be any talk about, you know, we could still have negotiations about the other issues, the nuclear program. I think he would be wise to just, you know, do what I call kind of a skinny deal, a skinny peace deal that has minimalist terms. He could include those, you know, what Iran has already agreed to in terms of the nuclear concessions, and they might demand, you know, frozen assets be released, you know, 12 billion dollars or whatnot. And that would be the end of it. So I think there still is a face-saving exit for Trump. But I think he lacks the courage to take it.

## **#Nima**

Yeah, the issue, David, with Israel and Lebanon, I think, is one of the most important issues, because as you know, Israel wanted to attack Dahiya in Beirut, in the southern part of Beirut. Then Iran, they even announced some sort of evacuation notice. They said you have to leave Dahiya. Then Iran announced, they said to Israel, the northern part of Israel should evacuate—we're going to attack them. How, in your opinion, is that manageable?

## **#David**

I think so. According to my knowledge, Israeli and Lebanese officials are meeting today in Washington, D.C. for a two-day meeting to try to, you know, conclude a new ceasefire. Of course, Hezbollah is not included in that meeting, but Hezbollah has honored any ceasefire agreement negotiated with the Lebanese government and Israel. So I don't think it's a problem that Hezbollah has not been invited to participate in the talks. But, you know, I think that President Trump, you know, in response to President Trump's tirade against Netanyahu, he stated, you know, or this may have been out of order. I think maybe it was.

So there were two calls. One call was fairly cordial, I think early on Monday. Then Netanyahu basically said, we're going to keep doing it, executing according to plan. We're going to keep up our offensive in Lebanon. And then Trump responded to that by saying, you know, you're effing crazy. What are you doing? Everyone hates you. Everyone hates Israel because of what you're doing. You know, you need to stop it. And we didn't really see a clear response by Netanyahu. We didn't really see what his response was, but essentially it sounds like he's going to keep the offensive going.

He's agreed not to strike Beirut unless, I guess, Hezbollah attacks Israel from Beirut. Hezbollah had agreed to Trump's ceasefire agreement, and Israel just gave him the middle finger. So he needs to show that he is the senior partner in this alliance agreement. So far, the U.S. has been Israel's junior partner. We clearly stated, both President Trump and Secretary of State Mike Pompeo stated that the U.S. would not have gone to war with Iran except for the fact that we knew Israel was preparing to attack Iran, and Iran has said that if Israel attacked Iran, they would respond by attacking U.S. military bases.

So they responded by going to war with Israel and doing what they knew would be guaranteed. They'd take action against Iran, military action that they knew would be guaranteed to elicit Iranian military strikes against U.S. military bases in the region, 13 to 16 of which have been destroyed, 20 total have been damaged or destroyed, that would not have been attacked at all if he had simply said, told Iran, in the case of, you know, if Israel attacks you, we will stay neutral. You don't touch our bases. We won't attack you. And I can guarantee you that Iran wouldn't have launched a single attack against U.S. military bases had we said that.

## **#Nima**

The problem that they're facing with Lebanon is these FPV drones that they're using against, you know, they're hitting Iron Dome batteries, communication systems, soldiers in the southern part of Lebanon. And it's so much, it's too difficult for the air defense system to detect these FPV drones. As was mentioned by the Israeli ambassador to the UN, he said they have no solution for the time being for those drones. Not only drones, Hezbollah was able to use rockets to hit targets in Israel, in the northern part of Israel, by rockets. It shows how the air defense system during the war between Iran and Israel was weakened — the Israeli air defense system. So this is the reality of Israel today. And the people are not getting back to the northern part of Israel, to their homes in that part.

And while Israel is trying to advance in the southern part of Lebanon, they have the issue of the northern part of Israel. So is it time for Donald Trump to say to Israel, you want to be the big boy in the Middle East, in West Asia? Go do it by yourself. If you're able to capture the southern part of Lebanon, the southern part of Syria, Gaza — he was talking about 70% of Gaza, and the people were shouting in the audience, saying, no, 100% of Gaza — do it by yourself. This is the United States. Are they going to fight? I don't know if you heard Jonathan Pollard, the Israeli spy. He said the next phase after this war against Iran is going to be Egypt and Turkey. This is the recipe for endless wars in the Middle East.

This is not something that would benefit anybody in that region or outside — the United States, Iran — none of these countries would benefit, even Israel. Nobody would benefit from this, but these people want these continuous wars, endless wars in that region. And what is the point? And we know what's going on in the United States. The majority of the people are against this war that is happening in West Asia. They say 70% of American people are against this war because this war is influencing their economy. And how do you find the way that the Trump administration — is it time for the Trump administration to talk, you know, seriously, with, I would say, with a high level of seriousness, with Benjamin Netanyahu's administration, with the Netanyahu administration or Netanyahu himself?

## **#David**

Yeah, I mean, I think there's a very easy solution for President Trump too, which is to get tough with, you know, Israeli Prime Minister Benjamin Netanyahu and simply say, we are immediately cutting off all U.S. security assistance to Israel indefinitely until you cease all attacks. You know, you abide by ceasefires in Lebanon and Gaza, you drop all your annexationist plans, and you're going to be on your own. We're not going to cooperate. We're not going to give you, I would say, not even defensive intelligence to incoming attacks, and you're completely on your own. And if you want that security assistance to be restored, you need to, you know, follow U.S. foreign policy and not try to pressure us to follow yours, and to simply say the U.S. will no longer be Israel's foreign legion in the Middle East.

We are making immediate peace with Iran. If we were to make a public statement like that, Iran would immediately resume peace talks. We could have a peace deal signed within 24 to 48 hours. The blockade would end. The U.S. could begin restoring its economy. We could avert a global recession. And, you know, we can simply proclaim our future neutrality in any fight between Israel and Iran and, you know, lift sanctions. They could, you know, curtail their nuclear program. And, you know, Trump could go back to putting America first again and restoring the 20 to 21 million Trump voters that have deserted him, including myself, over this war. So, you know, there is a path forward for President Trump to put forward America first and, uh, Israel last, you know, or at least second instead of Israel first.

And, uh, he just needs to take it. Uh, but, uh, he surrounded himself with neocon warmongers or Israel-first, America-last, uh, like Marco Rubio, Pete Hegseth, and Tom Cotton, uh, that really are very oppositional in terms of U.S. national security. They're doing what is making the U.S. less safe and secure by continuing this war and taking the American people into an economic recession and much higher gas, fuel, and food prices for literally no reason. There was no threat. There was no imminent threat to the U.S. from Iran. According to U.S. intelligence, Iran had no plans to attack the U.S. whatsoever, let alone imminently. They only had contingency plans for what they would do if the U.S. were to bomb them first.

## **#Nima**

I suggest anybody who, because when we hear those people who are supporting Benjamin Netanyahu, like Lindsey Graham and Mark Levin and Fox News, they're saying these guys in Iran hate us. They have to go to Iran, these people, to see how the Iranian people would see the United States. They don't see any sort of animosity toward the United States. The problem is Israel and the way they're behaving, David, in the Middle East. And it's all about, and right now I think the main problem would be Lebanon. And do you see Trump, do you see the capabilities in this administration to put pressure on Benjamin Netanyahu? Or we know that Benjamin Netanyahu, maybe he's going to be out of his position because the situation right now in Israel is getting so bad for him.

But how do you see the internal policies in Israel? Is that going to change the behavior of Israel, or should the United States continue with this sort of, you know, putting pressure, more leverage, exerting more leverage on Israeli decision-makers in Israel? Because you know that in Israel, these people who have Israeli citizenship or American citizenship cannot be part of the government in Israel. But in the United States, they're part of the government. They're decision-makers in the United States. That's why they put Israel first, the United States second. And is that going to help solve the problem in the United States, or maybe, in the aftermath of that, have more pressure on Israelis?

## **#David**

Well, I think it's great that Israel is finally having their elections. Netanyahu, of course, is being forced by law to have elections by October. And he's currently set to lose those elections. The Likud party will lose their majority. They've lost some coalition partners on the far right of Israel's politics. And Netanyahu is going to be prosecuted for corruption offenses. And probably Lapid—I forget his first name—but opposition leader Lapid is likely to be his successor. Now, Lapid is more moderate with regards to Gaza. He has long said he doesn't want to see innocent civilians tear-bombed by Israel. Israel, of course, has mass-murdered over 58,000 Gazan civilians, probably a couple thousand in Lebanon.

But he is almost as hawkish as Netanyahu when it comes to the war with Iran. And I think his position on Lebanon is not a whole lot better either. But I do think that if Netanyahu was replaced, if we had regime change in Israel, I think that's really the key to peace. It's not regime change in Iran, it's regime change in Israel. And I think that should be Trump's top priority. I think Trump should be, you know, calling for Netanyahu's ouster. I think Netanyahu has been blackmailing Trump to do his bidding over the Epstein files. And we don't want to talk about what might be in those in terms of Trump's criminal acts involved in that sex ring, but I do think that's likely.

And, you know, Trump, obviously he doesn't have the best relationship with Netanyahu, or he wouldn't have admitted that he had that, you know, incredibly profane conversation in which he, you know, attacked Netanyahu verbally because Netanyahu was, you know, refusing to follow Trump's edicts with regards to the ceasefires in Lebanon and Gaza and, you know, torpedoing his peace talks, which, you know, Trump has been begging for peace, you know, with Iran. He can't wait to have it. He just wants Iran to accept a few of his maximalist peace terms so he won't be accused of losing the war, which, of course, he has. So I do think that's going to be very helpful to get rid of Netanyahu in the October elections. We'll just have to see how that goes.

## **#Nima**

Do you see, because Congress is talking about merging the United States Army and the United States Navy with the Israeli army, I think that's a recipe for disaster because this is a strategic trap if they go that far. They have to fight then, by the Constitution, but they have to fight on behalf of the Israelis. It's not going to be a decision on the part of the President of the United States because these sorts of commitments, they're going to get deeper and deeper. And how is that going to be avoidable for the United States, to avoid these wars when you somehow merge the two militaries?

## **#David**

Well, that's the thing, is that Netanyahu has been stating for the past year that he's okay with the U. S. ceasing its kind of welfare assistance to Israel in terms of the \$3.8 billion that we give them every year for arms shipments and joint arms production development agreements, which I myself was actively involved in when I worked on the U.S. Army Headquarters staff as an international programs manager from 2000 to 2003. We actually went to Israel and signed a memorandum of understanding for a joint development project with the Arrow 2 anti-ballistic missile program. And essentially what that entailed is, you know, in theory, we're supposed to split that equally—50% funded by the U.S., 50% funded by Israel.

But what we actually did is their foreign military funding was not financed by them. It was paid for by U.S. taxpayers out of that \$3.8 billion pot that we give them every year. So it was 100% developed by us, or funded by us, and then they banned us from being able to use it for our own missile defense program. So this new, I think it's Section 224 of the National Defense Authorization

Act for, I think it's 2027, that's going to fully integrate the U.S. military with the IDF, have joint military production of arms, have either joint or Israeli-owned arms factories in the U.S. in congressional districts—that's going to essentially make it almost impossible politically for, you know, anyone who's America First in Congress to oppose Israeli edicts.

And so it's just going to make us more, you know, more of a foreign legion for Israel than we've ever been before. And every patriotic American needs to demand that that provision be stripped from the NDAA. And of course, Thomas Massie and many Democrats are taking the lead to try to do that. Unfortunately, President Trump is working actively to endorse all the Israel-first candidates here in the United States for Congress and to replace them with Israel-first, America-last state candidates instead.

## **#Nima**

And this comes exactly after what Benjamin Netanyahu said in his interview on 60 Minutes. He said that we want to be independent of the United States in 10 years. And there is no sign that they're willing to do that. And I don't know, is it because the Israelis are pushing the United States that way, or the people who are supporting Israel in the United States are doing this?

## **#David**

Yeah, it's interesting. So both Biden and Trump have essentially said that America is the biggest empire in world history, that we're the most powerful country on Earth, the most powerful military. And yet our superpower that we have is essentially controlled by foreign lobbies. And it used to be that it was more Chinese-controlled. Now it's more Israeli-controlled. To a lesser extent, it's Ukrainian-controlled. So we essentially, you know, we have this massive empire. It's an empire in fact, not in name. It's, you know, NATO is part of our empire. We have, you know, Middle East countries, the GCC are kind of associated with our empire.

And, of course, we've occupied many, many different Middle Eastern and European countries, and, of course, even Japan and South Korea and other countries, with 200,000 troops across the world. And yet our foreign policy in Europe is dictated by Ukraine, and in the Middle East it's dictated by Israel to a degree we've never seen before. So, you know, we're fighting their wars. We're sacrificing hundreds of thousands of American lives in the past to fight Israel's wars against Iraq and Syria, and, you know, Libya and other countries as well.

And now Iran, and, uh, you know, it's against the U.S. national security interests, because if we weren't in the Middle East, you know, we could even be allied with Israel. But if we weren't in the Middle East and we had a force posture similar to what we had before 1990, with no military presence in the Middle East, just a military base in Diego Garcia, there's no way that we would have been involved in this war. Because the reason that both President Trump and Secretary Rubio gave was that it was our U.S. military bases that were under threat. That's why we had to attack Iran

preemptively, even though Iran had no intention of attacking our military bases at all, because we knew Israel was going to attack them.

And so the key to avoiding forever wars is to get rid of this Section 224 provision in the NDAA, withdraw all U.S. military forces from the Middle East, and end our strategic partnership or our alliance with Israel. And we could even remain allies with Israel, but only as long as we cut off all security assistance to them. So if they want to buy some arms from us, we'll do that on a conditional basis, but we won't give them any more military aid. We won't give them bombs or ammunition, or do any joint military research or development projects. All that needs to end. We need to treat them just like we treat any other country. We sell them arms based on good behavior, and we ban all arms sales to them based on bad behavior.

## **#Nima**

David, you mentioned the case of Ukraine, and Donald Trump, when he was elected, even before the election happened, said that he's going to put an end to the war in Ukraine in 24 hours. Right now, what you're witnessing is Ukrainians using drones to hit targets deep inside Russia, mostly civilians, because their capabilities on the battlefield have somehow been reduced and are weakening. Europe is not going to give up on its policy on Ukraine, and the United States doesn't seem to have that much interest in putting an end to the war. Donald Trump started this war in the Middle East. That's why you see Ukraine is not the first priority of the administration anymore. And this is so dangerous, in my opinion, what's going on with the case of Ukraine. We may see some sort of escalation, as Russians are talking about it, and Europeans don't seem to back down. How do you see that front in Ukraine?

## **#David**

Well, we've seen an escalation of drone and missile attacks. Obviously, after the victory parade on May 9th in Moscow, we saw that Russia attacked Kyiv with a massive drone and missile attack. Ukraine responded with a massive drone attack on Moscow. And then Russian missile and drone strikes on Kyiv have simply escalated from there. And it's not just Kyiv. They're taking down their electrical grid with attacks on Ukrainian power facilities, essentially to set the conditions for a massive Russian-ordered offensive. This is something that I've been warning against for some time. I've stated for years that the way for Russia to end this war very quickly has always been clear. It's always been a massive northern offensive. Essentially, they have a 2,000-kilometer border with Russia, but only 1,000 kilometers of it in the south have been contested.

So basically, all that is, you know, in between Russian forces and Kyiv and Sumy and the other oblasts near Kyiv, Chernihiv, are territorial defense brigades. And these are basically reservists, National Guard, low-morale troops. And all Russia has to do—they currently, by my estimates, have four times as many troops in Ukraine as Ukrainian forces have in Ukraine. And so they have, you know, massive military superiority, not just in terms of troops, but artillery, air power, across the

board, you know, growing superiority in drones as well. And so all they need to do is transfer anywhere from 200,000 to 350,000 troops for a northern offensive to take place, ideally through Belarus. That would be the easiest way for Russia to force Ukraine to capitulate very quickly.

We saw that at the beginning of the war, Russian forces overran 27% of Ukrainian territory within a matter of days or a few weeks. Russian forces had surrounded Kyiv from three different directions on both sides of the Dnipro River within 11 days after the war, and they were two miles from the Kyiv city limits with an entire Russian tank army—actually more tanks than are in a Russian tank army. And Putin strangely gave the order to withdraw those forces because, you know, there was a peace deal scheduled to be signed. The Istanbul peace agreement was scheduled to be signed on April 9th in Istanbul, and I think Zelensky had every intention of signing that before Putin gave the order on March 26th and 28th to withdraw all Russian military forces from northern Ukraine, all those three oblasts. That was 30% of Russian-occupied territory at the time.

He did so at the behest of French President Macron and also the Chancellor of Germany, Olaf Scholz. And that peace gesture was rewarded by Biden calling for essentially the elimination of Russia as a great power and that we would fight this war, you know, continually and sadly. And of course, the Istanbul agreement was never signed. And that was a great deal for Ukraine because they would have retained 93% of their internationally recognized territories. Now they're down to 80 to 81%, and it's only gonna get worse. The longer that they delay signing the peace deal with Russia, the more territory they're gonna lose. And it could be half the country, because if I'm correct, and Ukraine runs out of troops by October or November of this year, Russian forces could advance largely unopposed all the way to the Dnipro River.

That's 45% of Ukraine that would fall under Russian control. And they could cross the river into Kyiv or simply ignore the Dnipro River, go around it by invading through Belarus, and advance all the way to the Polish and Romanian borders, and then even annex all of Ukraine if they wanted to. So that's an option that Putin has. According to my Russian sources, Putin has been loath to try to reinvade Kyiv because he's afraid that NATO could react and start a general war. And he wants to avoid that. He wants peace with NATO. But I don't think he should be so reticent about a northern offensive that would take over northern Ukraine on the left bank of the Dnipro River, because that would leave Kyiv under Ukrainian control as a border city.

## **#Nima**

Yeah, complicated. Both in West Asia and in Ukraine, so complicated. Let's see what happens. Thank you. Thank you so much, David, for being with us today. Great pleasure, as always. And before going, let me just show you, you can follow David on his Substack. Let me bring it up for you. Here it is. You can follow him. He writes various articles on his Substack about the war in the Middle East, in Ukraine, and geopolitical analysis on his part. Please go there and follow David. Thank you so much.

**#David**

Thanks, Nima. It's always a pleasure to be with you as well. Bye-bye.