

David Pyne: Breaking: Strait of Hormuz JUST CLOSED

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#Nima

Hi, everybody. Today is Saturday, June 20th, 2026, and our dear friend David Pyne is here with us. Welcome back, David.

#Guest

Hey Nima, great to be back with you today.

#Nima

Let me start with the latest on what's been going on in the last 12 or 24 hours. We have some sort of huge conflict in the southern part of Lebanon. The war is going on between Israel and Lebanon, and they tried last night to capture one of those castles that are so important for Hezbollah, but they failed. This is the sixth time, you know, I think they tried it before five times, and this was the sixth, and they failed to capture that castle. It's so important for the region, for Nabatieh and the southern part of Lebanon. Then the attacks—Iran is putting pressure on the United States. And moments ago, before coming to this live, we learned the IRGC in Iran reported that they have closed the Strait of Hormuz officially. They have closed it.

And the two delegations, the U.S. delegation and the Iranian delegation, are going to Switzerland, and they're going to talk. From what we've seen so far, the news that came out says J.D. Vance is going to be the head of the delegation in Switzerland. On the part of the Iranians, it's going to be the head of the Iranian parliament, Qalibaf. Basically, looking at the two delegations, they're the same as they were before during the Islamabad talks, that discussion—direct talks between the United States and Iran. The two sides are so prepared. I would say on the part of the Iranians, they have the head of the Iranian Central Bank, the Iranian foreign minister, the head of the Iranian parliament, and one from the National Security Council of Iran. On the part of the United States: J.D. Vance, Jared Kushner, Steve Witkoff.

We have the two mediators, Qatari and Pakistani mediators, in that meeting. IAEA—we've learned it's going to be Grossi, or the guy from the IAEA, representing them in the negotiations. This is what's going on tomorrow. They're going to meet in Switzerland. And as time goes by with the conflict, as I've mentioned, in Lebanon, Iran has closed the Strait of Hormuz because the first line, the first point in the MOU, is not being respected by the Israelis. And here is what's going on. And when it comes to the meeting between the two sides in the European Union, what is so important? And what would be the main objective, I would say, on the part of the Iranians? They basically want to talk about the situation in Lebanon, as we've seen with the case of the Strait of Hormuz. But how do you see the perspective? How do you see the view of J.D. Vance and his delegation?

#Guest

Well, first of all, thank you again for having me on the show. This has been a momentous week in U.S. foreign policy and at least foreign relations. President Trump made the decision to sign that MOU that I'm calling a 60-day armistice agreement with Iran. And it's a sweeping victory for the Islamic Republic of Iran. It has very few concessions to the United States, but quite a few concessions by Iran. And I've described it as, since it was signed by President Trump in the Palace of Versailles and it had 14 points, I've been calling it Trump's Treaty of Versailles with Iran, because essentially we had a conditional surrender to the Iranians.

Maybe that's played up a little bit too much, but I think that's essentially what it was. And it's what I predicted it would be at the onset of the war—that this war would continue until President Trump accepted Iran's terms. And I said that within the first five days of the war, essentially. I said it would be a strategic defeat for the U.S. Actually, before the war even began, I said it would be a defeat for the U.S., inevitably. And my predictions have been proven correct, unfortunately. I would have loved to have been proven wrong in this instance. But President Trump's war against Iran has strengthened the regime. It's strengthened Iran. It's made Iran into a regional hegemon.

And we've seen, as you mentioned this morning, that the IRGC is able to act with impunity to reclose the straits in response to ongoing egregious Israeli violations of the agreement. Now, of course, Israel has rightly stated that it is not bound by this agreement because it was not a party to the agreement. But the U.S. has guaranteed, essentially, that Israeli troops would be—at least there would be a ceasefire in place. And reportedly, President Trump also assured Iran that there would be a full Israeli military withdrawal from southern Lebanon. And unfortunately, Prime Minister Netanyahu has essentially been giving Trump the middle finger and saying, we're not only going to not continue...

We're going to continue fighting. We're going to, you know, start a massive ground offensive and air offensive to show you that we don't care what you think. And we've seen tremendous—you know, what I love about President Trump and Vance this week, Vice President Vance, is that they have been very critical of Israel to an extent that we have not seen in a U.S. presidential administration

probably before. And that is a tremendously positive development because it is Israel that has played the part of the spoiler that's caused us to be embroiled in these wars. Now, with regards to your specific question about what each side's objectives are, you're absolutely right.

Iran's objective in these negotiations that are hopefully going to occur tomorrow is to bring about an end to the war in Lebanon, to try to enforce point one of the armistice agreement, and also to obtain full sanctions relief of all U.S. primary and secondary sanctions on Iran. Vance, of course, his top objective is to constrain Iran's nuclear weapons program to the maximum extent possible. Both Trump and Vance have claimed that Iran's nuclear program has been destroyed. In fact, the reports that I've seen are that their nuclear weapons program is largely untouched. It was hardly even targeted during Operation Epic Fury. And so they have all 1,000 pounds of their highly enriched uranium still available, the same amount that they had before Operation Midnight Fury or the 12-Day War back in June of 2025. And I think the best we can do is essentially freeze Iran's program.

I think that it would be a great victory if we could essentially have the JCPOA reimplemented with stronger verification measures. And that is essentially what Iran was offering before the war. They had a very comprehensive deal to avoid war with the United States. They provided it to U.S. negotiators on February 27th. On the following day, Israel assassinated their supreme leader with full U.S. support. In fact, Trump has claimed credit for killing the supreme leader and members of the first family of Iran, very disgracefully. But I want to give President Trump credit where credit is due, in that he's turning the page in Iranian and Israeli relations in a very positive way.

What I would construe as a very America First way, you know, realistically treating Iran not as some kind of crazy, you know, suicidal rogue regime, but as a reasonable and rational actor on the international stage, in international affairs, which is what they are, because they had the ability to escalate in five different ways that I've explained in, I think, our previous interviews, including nuclear, super-EMP, cyberattacks on the U.S. homeland, hypersonic and supersonic anti-ship missile strikes that could have sunk U.S. Navy ships in the Gulf region, and then, of course, Hezbollah terrorist cells that are in the U.S. itself. And they chose not to do any of those things. So I'm not saying that Iran is a peace-loving regime, but they certainly have prioritized peace with the U.S. and Israel, and they were not the ones that started this war.

#Nima

Do you think that—you mentioned how J.D. Vance was somehow responding to the Israeli attack on Donald Trump because they were, you know, somehow, it's not about Israel, but the media in the United States who are cooperating with the Israelis—they were attacking Donald Trump because of his position, his new position. He says that I may get something out of it. And the MOU, by the way, David, I think it's some sort of document to deescalate. It's not any sort of agreement. That's why I don't see—maybe your understanding is that Iran is winning with the MOU—but nothing is out so

far. It's some sort of de-escalatory process for the two sides to come together after many, many years to talk, at least to see what's going on between the two countries. But Israel doesn't want that. The agenda on the part of Israel is the continuation of the war.

The continuation of the war is not going to benefit anybody. I'm talking about on the part of Iran and the part of the United States. And nobody in the region or outside of the region—in Europe, go far, even Japan and Korea—no one's gonna benefit from the continuation of the conflict. But the Israelis are pushing for that. And J.D. Vance is coming and responding to their sort of attack on the administration. Do you think that's gonna lead the United States to take some sort of serious measures toward Israel with the occupation? Because as long as they're in Lebanon, in the southern part of Lebanon—just yesterday, they said, “We are advancing in the southern part of Lebanon. If Hezbollah attacks us, we're gonna retaliate.” This is the recipe for endless war in the southern part of Lebanon. There has to be some sort of serious push, serious pressure on the Israelis. Is that gonna happen?

#Guest

I think it will. Yeah, I really—I've never been more optimistic that, you know, Trump and Vance are, you know, moving U.S. foreign policy in the Middle East in the right direction since the war began, since well before the war began. Because, you know, of course, I predicted that the war would break out in the first place. I didn't predict the first war, the 12-day war. I thought Trump would be smart enough to avoid that. But I predicted this one would happen. But yeah, J.D. Vance has pointed out rightly that the U.S. and Israel have very different foreign policy objectives with regard to Iran. Trump's policy is to restore peace, essentially to restore the status quo ante, which, of course, would mean that, you know, Iran doesn't control the strait, that the U.S. and Iran are at peace and that they're not bombing each other.

And unfortunately, there's nothing the U.S. can do militarily or diplomatically to reverse Iranian control of the Persian Gulf. Iran, you know, had the ability, of course, to control the Persian Gulf and control the Strait of Hormuz. And they chose not to do that because they were trying very, very passionately to avoid war with the U.S., because they understandably did fear President Trump, and they were contained. They were not conducting any attacks, proxy attacks against U.S. troops or bases. And they never would have if President Trump hadn't joined this war. All he had to do was, when Israel started the war, say, you know, transmit to Iran that the U.S. would stay out of the war, would remain neutral.

And if they didn't attack U.S. military bases, we would never attack them. And instead, he decided, you know, President Trump went to war to try to save U.S. military bases from being attacked by Iran, but essentially guaranteed that they would be destroyed by Iran by doing so. So that was a very self-defeating action. You know, Iranian control of the Strait is, you know, that means they essentially control 20 percent of all, you know, oil reserves in the world in terms of, you know, transporting it out. And, you know, friends of mine have said, well, this war wasn't really about Iran.

It was really about China and trying to limit Chinese oil supplies. Well, you know, Chinese oil supplies have increased, really not even been interdicted at all, because, as some of my friends call it, it was a leaky blockade.

You know, the U.S. essentially looked the other way as Chinese tankers, you know, left the Gulf from Iran to China almost the entire time. That was essentially the deal that President Xi Jinping and President Trump agreed to at the Beijing summit where, you know, again, the U.S. gave the concessions and China really gave no concessions. So we're seeing a pattern here where, you know, President Trump has acted like we're the biggest superpower, but he's the one making all the concessions and our enemies are not. So who really has the power here? As I mentioned, as I wrote on my Real War Substack on March 5th, you know, this war would transform not just the regional order, but also the global balance of power against the United States. And I think that that's exactly what we've seen happen.

#Nima

I think what has happened with the case of China, you see China even being more prepared than the United States for the war. You know, look at the oil reserves, look at all they had before this war started, as though China was planning for the war, not the United States. That was somehow amazing. Because Donald Trump, before the announcement of the signing of the MOU, he said, we are poor people. We are four weeks away from the oil reserves being totally depleted. So how is that going to be? That's why you see how China, I think the way that China diversified its sort of importation of oil and gas, it's just amazing. I think many people should look at that. Coming back to the situation, we had J.D. Vance last night talking to one of these podcasters. He said Israel needs to understand they are allies of the United States, as the United Kingdom and France are.

But Israel doesn't feel this way. I think for many Israelis who are hearing what J.D. Vance is talking about, they say this is a total betrayal of Israel because they don't feel that way. They want the United States to consider them as the most important ally, not just France. France is nothing in their opinion. That's why they're attacking the Trump administration. But is that going to be forced, this sort of idea on Israelis, to understand their position, to put them at least in their logical and, you know, rational place? Because it's not rational to feel that you are one of the states, you know, the 51st state maybe, of the United States. Maybe they feel themselves as Washington, D.C. So the United States has to react. What is your understanding of that, and how far would the Trump administration go to make them understand the new equation of the region?

#Guest

Well, I think the problem is President Trump made a pact with Israeli-American Miriam Adelson and others that if they would finance his presidential campaign and help him get reelected and avoid further prosecution, then he would be the most pro-Israel president in U.S. history. And essentially that's what he ended up doing up until this point. He's been slavish in his devotion to doing

whatever Netanyahu wanted him to do. And I've jokingly described him as Israel's puppet president. I think maybe that's a little bit too far. Basically, he's been dog-walked by Benjamin Netanyahu into a war that was fought in complete opposition to U.S. national security interests.

And it's done great damage to our national security. But it can still be used to reset U.S. foreign policy in an America-first direction because we've proven that these endless wars in the Middle East have great costs, great risks to the U.S., and no benefits. So, yeah, to answer your question, I think what needs to happen is, number one, President Trump needs to have direct talks with Netanyahu's opposition leaders that are running against him for prime minister. And basically say, hey, whichever one of you guys is willing to commit to align yourselves with U.S. foreign policy, which is a full U.S. or full Israeli military withdrawal from Lebanon, I'll endorse you and I'll support you against Netanyahu.

And I will call for Netanyahu's ouster because, essentially, the key issue that needs to happen for this armistice agreement—which I think is very comprehensive and, you know, really could be extended indefinitely as essentially a permanent peace agreement—is regime change in Israel. You know, it's the Netanyahu regime that's the rogue state. They're behaving like a rogue regime, and that's really the key to just and lasting peace with Iran. There are other things we can do as well. We can cut off, or threaten to cut off, all U.S. security assistance to Israel until they withdraw the last IDF soldier from southern Lebanon. I think that would be a really good step in the right direction.

And lastly, I think, you know, there are six sections in the National Defense Authorization Act, including Section 219, which used to be Section 294 or 224. And that would essentially, you know, merge the U.S. and Israeli defense industrial base and technological base with Israel's, as well as basically have a kind of a Five Eyes merger of U.S. intelligence with the Mossad. And I think Trump should immediately say he will veto that bill if even one of those six provisions is in it. And those three measures, I can guarantee you, will compel Netanyahu to, you know, run it, pull out of Lebanon. You know, the U.S. has tremendous diplomatic heft. We have a tremendous ability to influence Israel. But we have behaved, mainly with President Trump, as an Israeli vassal state. It's not that Israel is the 51st state of America. It's that we're the United States of Israel, and that needs to end.

#Nima

I think that is the necessity that the people—I would say the faction that J.D. Vance created, he's the head of it in Washington—are trying to do. That's not an easy task, by the way, because we know, on the other hand, we have those people who are supporting Israel. But the reality somehow, I think the final decision would be on the part of the president of the United States, Donald Trump, because he sees two options right now. One of them is getting back to war, this continuous war. Nobody knows what would be the end of the war and how he—I don't know if he's going to be able to put an end to the war before his time is over in the United States as the president of the United States.

But the other option would be putting pressure on Israel and bringing them to some sort of sanity. And many people, as you see—the Qatari government, the Pakistani government, all GCC countries together—are in favor of a new deal between the United States and Iran. And how do you see the leverage they can bring to the table, or somehow convince, somehow that could be convincing for Donald Trump himself, who we know is going to decide after all? We have two factions somehow fighting with each other, and Donald Trump is going to decide. He was deceived by the Israeli faction before this war started. That's why he went to Israel, to war against Iran. And how is the outcome of the war going to reshape his opinion, in your opinion?

#Guest

Well, I think, you know, President Trump has returned to being an America First foreign policy realist because he is, you know, we essentially threw everything we had from a conventional military perspective at Iran, and the regime is still standing. The mightiest conventional military and naval force in the world, the U.S. Navy, was unable to dislodge Iran from control of the strait, even though we sunk all 11 of their, you know, surface combatant ships, you know, a couple of drone carriers that were 40,000 tons plus, you know, some frigates and, you know, at least one or more submarines and some corvettes as well.

And, you know, the Iranian Navy, they almost don't even need their, you know, thousands of IRGC fast missile boats that they have that are 30 tons or less in most cases. They almost don't even need those to enforce the strait because they have so many coastal anti-ship missile defense sites—91% are still operational. So, you know, this just proves that the U.S. military is not all-powerful. The U.S. is not, you know, the mighty superpower in the world. As you mentioned, you mentioned China. I think Russia also arguably is more powerful militarily.

Certainly, Russia doesn't have the ability to project power across the globe as the U.S. does. I think China really does. They've just chosen not to because their focus is like a laser on retaking control of Taiwan in the very near future. And it's clear that this war, if we can't win a war against a secondary nuclear-grade power like Iran, there's zero chance we would be able to defeat China in their own backyard if they were to make a move against Taiwan in terms of a blockade and/or an invasion. But I think there's not a whole lot that our Gulf allies can do to try to move us in the direction that President Trump is going.

I think they just need to support and completely endorse the armistice agreement and, you know, argue that negotiations and diplomacy should continue indefinitely. And we should try to move to really what I would argue is a deal with Iran where, if they agree to comply with all terms of the arms agreement, and in addition that they will act very quickly to dilute all 1,000 pounds of their highly enriched uranium, the U.S. will commit to lift all sanctions as soon as they've done so, and to make this 60-day arms agreement a permanent peace agreement. Because I think it really has all the elements that are necessary to make this a more just and lasting peace.

#Nima

You know, Israelis talking about their objective, basically they're talking about Iranian ballistic missiles, Iranian support for the Iranian so-called proxies in the region. And they said that if Donald Trump goes with the MOU, he's going to give Iran a lot of leverage on the production of these missiles, because if they lift the sanctions, that's going to hugely benefit Iran in the long run. When they're talking about Iranian ballistic missiles, that doesn't make any sort of sense to me, because how can you imagine that Iran would negotiate on ballistic missiles, which are the basic means, the basic tool in their box to go against any sort of attack on Iranian soil? How is that going to be? How do you understand the mindset on the part of these people?

#Guest

They're not going to do it. And President Trump was wise. He didn't include their ballistic missile program as part of the comprehensive armistice agreement. He essentially dropped his demand that their missile program be limited in any way. And that just shows that Iran had most of the cards in the negotiations, and the U.S. had very few cards to play. They had most of the leverage. We had very little leverage. We did have some leverage because we still have one of the biggest and most powerful militaries in the world, but much less than people realized. And so, as President Trump stated during one of his press conferences, Iran had 7,500 ballistic missiles before the war.

U.S. intelligence assesses they now have 5,600 ballistic missiles. That's a lot of ballistic missiles. I mean, they only used 14 to 15 percent of their ballistic missiles that they fired against the U.S. and Israel. And then during the war, the U.S. and Israel were able to destroy about 15 to 16 percent of their missiles. So, you know, President Trump made all these outlandish claims that we destroyed 100 percent of Iran's military capabilities or even 85 percent. That's far from true. This was one of the most ineffective U.S. military campaigns we've ever fought. And the reason is, in 2003, when Bush invaded Iraq, Iran saw the writing on the wall and thought that we would try the same thing against them.

And they knew that any campaign would be primarily an air campaign. And so for the last 23 years, they've constructed a lot of underground facilities—missile production, nuclear production facilities—deep underground, which cannot be destroyed by conventional airstrikes alone. And so really, the only way we have to defeat Iran militarily is a nuclear first strike. And although President Trump alluded to that, that he threatened that three times that I'm aware of, I think it was a bluff. He had no intention of doing that. And so he has accepted reality. And you saw there was a body language expert on YouTube that kind of assessed how Trump reacted in terms of body language when he signed the agreement.

Normally, when he signs something he really likes or thinks is good, he smiles, you know, he holds up the agreement. This time he was kind of—his shoulders were hunched forward, and he looked kind of dejected. He held up the agreement, but, you know, no smile at all. You know, someone—

they were clapping and praising him, and he wasn't smiling at all. You know, normally if he thought that was a victory, he would be smiling. He knew it was a defeat, and it was a humiliating defeat. But he's been defending it. He's been really defending every element of it. He rightly said that the alternative was a worldwide global depression, and he's defended Iran's right to self-defense. He's defended their right to build missiles.

He said that, you know, if all of Iran's neighbors have ballistic missiles, why shouldn't they? You know, they have the right to self-defense. J.D. Vance has said the same thing. He's praised the Iranian leaders, which, you know, four days earlier he said were dishonorable and terrible. And now he's saying they're nice people, they're nice to work with, and it would be an honor for him to meet the Ayatollah in person. He doesn't want to, but if he did, it would be a great honor because, you know, the Iranian people, Iranian leaders, you know, love their people, essentially. So he's made all these statements. And these are the kind of statements we see about, you know, Russian leaders, about Chinese leaders, and North Korean leaders when he knows that he can't defeat them militarily.

He only says things about leaders that either have nuclear weapons or he recognizes as kind of a near-peer adversary that the U.S. doesn't have the ability to compel to do our will. And so that is a very refreshing turn. Again, I'm an opponent of Iran's Islamist regime. I'd love to see them overthrown. But realistically, we have to have peaceful coexistence with Iran. There's nothing we can do about it. We have to just work with them and push them to reforms internally. But again, that's really Iran's business. Whether the regime decides to have internal democratic reforms is really not something we can compel at all. And so we should work with them to have the most secure and stable and enduring peace in the Middle East that we possibly can achieve.

#Nima

One of the points that he mentioned was about the way Israel is going after people in Lebanon, which basically is the same sort of strategy, the same sort of tactic used in Gaza and the West Bank. You go after someone, you destroy the whole neighborhood for that single guy. And he said that, he criticized Israel for that. He said, you don't have to go and kill many innocent people because you want to get one of these Hezbollah commanders. This is what he mentioned. And later on, we saw yesterday what Ben-Gvir put out, which is unbelievable—the language being used in that tweet. Basically saying, for every tear of an Israeli mother, a thousand Lebanese mothers must weep. All of Lebanon must burn. And this is the mindset on the part of these people. I don't know how long it will take to change the behavior, or maybe they have to be removed from power in Israel.

Because these people—Israel is getting more radical, David. What is your understanding of what's going on? These sorts of statements, like yesterday by Ben-Gvir, we haven't seen them be that vocal about before, coming out, publishing videos of what they're doing. Because this guy is just repeating over and over what he's doing with those people—with Faletala, who went there to help the people of Gaza—the way he treated them. And then you see him coming out saying all of Lebanon must burn, the Middle East. He says in the Middle East, you don't win with measured responses or

restraint. You need to go berserk, to obliterate, to crush the terror. This is the recipe for it. We've seen what the outcome was in Gaza. And are they going to continue with this sort of behavior? I don't see even the people with J.D. Vance, with these people in the Trump administration—they're not going to support this sort of behavior.

#Guest

Yeah, I mean, J.D. Vance in particular was very strident in his opposition to those statements. I think President Trump also attacked it, maybe not specifically. But yeah, that is just unacceptable language. You know, Israel is an international aggressor. Netanyahu has boasted about being at war with, I think, seven different countries or proxy groups. Obviously, in Gaza, they destroyed 92% of all civilian homes. They've rendered 90% of the population refugees. They've either killed or wounded 7.5% of Lebanon's entire population. I mean, this is like—it's not Holocaust levels—but it's like the U.S. bombing of Germany or Japan. Actually, in many ways, it's even worse as a proportion, because I think in Germany during World War II, we destroyed about 20% of German homes.

And that was one of the most egregious bombing campaigns in history. And it's just unimaginable that 92% of Gaza's civilian homes have been destroyed. Ben-Gvir, you know, he boasted that pretty much all the homes in the Israeli-occupied 20% of southern Lebanon have been destroyed as well. So that's how Israel views victory—you destroy the civilian homes, you know, essentially obliterate it, gasify it, and make it look like Hiroshima after the atomic bombings. And that essentially encourages all of the population to leave the area so it can be settled by Israeli citizens. You know, I think that's really the objective. This plan is for Greater Israel.

You know, Netanyahu has this crazy dream where he wants to essentially, you know, annex Gaza, annex the West Bank, annex the Sinai, annex even, you know, parts of Jordan, Saudi Arabia, and Iraq, you know, southern Lebanon, southern Syria. I mean, this is, you know, it's not as bad as Hitler, but it's the same idea. I mean, you know, he's just wanting to annex all of his neighbors' territory. And the idea that the U.S. would continue supporting a country that's such a blatant international aggressor, that's committed genocide against Muslims, the Gaza civilians, and blown off the arms and legs of babies. That's something Reagan—that's why Reagan came down so hard against Israeli leaders in 1982. And it's just unacceptable.

You know, the U.S.—at best, Israel and Iran are enemies. You know, maybe they killed about the same number of people. But the thing is, you know, Iran did that in 47 years, but they don't invade their neighbors. You know, they're not a rogue state. They're not the aggressors; they're the defenders. And so they have the moral high ground in terms of this being a war of independence, a war of self-defense, self-preservation against U.S. and Israeli imperial conquests. And it's just not a good look for the U.S. to side with rogue regimes like Israel's that are trying to invade and kill off tens of thousands of civilians.

#Nima

Looking at what has happened at the G7 Summit in Europe, do you think they invited Brazil, the UAE, and Egypt to that summit? These three countries are part of BRICS. What is your understanding? What was the main agenda? What is in the minds of the G7 countries? Why do they need these countries to be part of the G7 Summit?

#Guest

Well, Brazil, of course, is a rising power. Their economy is growing very fast. They're going to be in the top seven very soon. So that makes a lot of sense. What were the two other countries?

#Nima

UAE and Egypt.

#Guest

Yeah, the UAE and Egypt are nowhere near the G7 level. At best, Egypt might be in the G20. The UAE, I don't think, is anywhere close. So I don't really understand the mentality there. But Brazil is a rising power. The U.S. and Western Europe are declining powers in terms of their relative share of the economy. You know, most countries, including China and Russia, are rising powers. Russia's expected, you know, they're the fourth-largest economy in the world. I think they might be pushed back to sixth. So maybe they're a little bit of a declining power, but, you know, countries like Russia and India—I'm sorry, China, India, Indonesia, Brazil, and Mexico—those are countries that are rising in terms of their economic power very quickly relative to the U.S. and other countries.

So, I think that makes a lot of sense. And, you know, I'm not a fan of Lula, Lula da Silva. I was serving a mission for my church in São Paulo, Brazil, you know, during the time when he first ran for office. And there was a joke—we had a joke—that said, you know, basically, "jump the wall." I won't say it in Brazilian Portuguese because my accent's all messed up. But yeah, they'd have to jump the wall because Lula would form a wall around Brazil, just like the Berlin Wall, which came down that year. But again, from a realist perspective, it doesn't matter who the leader of Brazil is. We have to work with them. We have to realize that Brazil is essentially the regional hegemon of South America.

And so, as a powerful country, even though they're aligned with Russia and China and BRICS, we need to work with them and include them in a lot of the diplomatic discussions to negotiate an end to wars. And the Trump administration reportedly has been very open to the idea of including Brazilian and Indian troops as allies—essentially, you know, peacekeepers in any endgame, you know, any peace agreement between Russia and Ukraine, where they would patrol, you know, kind of the border in the Donbass region and also Zaporizhzhia and Kherson. So I think that's a great idea. Obviously, Russia would be very open to having BRICS troops, you know, which are essentially allies of Russia, patrolling, you know, a 30-kilometer demilitarized zone. So, yeah, I'm happy to see that Brazil was included in the G7 meeting.

#Nima

How did you find the reaction of Europeans to the MOU, to what Donald Trump was supposed to sign? Because he was there, then he signed the MOU, but Europe was hit by the war in West Asia. They had the Nord Stream pipeline, the gas coming from Russia, and the war in Ukraine just destroyed all of that sort of connection. And then you see the war in the Middle East somehow putting much pressure on the European economy again, the second sort of hit on their economy. How did you find the way Europe reacted to Donald Trump's deal or MOU? It's not a deal; it's some memorandum of understanding between the United States and Iran.

#Guest

Well, I think, I mean, President Trump obviously was very angry that not one of our 31 NATO allies came to our assistance during our war of aggression against Iran, and understandably so, because it was an illegal war. You know, they didn't want to be seen as helping us in an illegal war, but more particularly, they knew that, you know, if the U.S. Navy couldn't dislodge Iranian-controlled islands, there was nothing they could do with their much, much tinier navies to accomplish that either. And they didn't want to risk their ships, their warships, you know, being sunk by Iranian anti-ship missiles. And so I think they breathed a big sigh of relief when Trump signed this temporary arms agreement.

And we saw that as he was in the Palace of Versailles, sitting next to French President Emmanuel Macron. And Macron, you know, clapped, led the clapping and the applause, and shouted "bravo." So this is a deal that, you know, obviously European economies, you know, their gasoline and other fuels and resources, passenger liner fuel, have really been very adversely impacted, probably even more so than the U.S. And as you alluded to, the U.S. Strategic Petroleum Reserve is down to its lowest level since 1982. China has had 1.5 billion barrels in their reserve, which is, I think, like four times at least what we have. So they were prepared for this, and they were prepared actually for a war with the U.S. over Taiwan.

They've been stockpiling massive quantities of weapons and raw materials and food stocks to a level we've never seen, because they do believe that the U.S. will likely defend Taiwan militarily, and they want to be ready for that. But that came in handy for this war because they, you know, at least long term, they did not anticipate that Trump would be stupid enough to fall into Netanyahu's trap and fight a needless, unnecessary war against Iran. So, you know, that was really the big news — that they were so much more prepared for this war than the U.S. was. And the U.S. was the one that, you know, started the war.

#Nima

When it comes to the changes in Israel, you see the alternative for Benjamin Netanyahu, for example. Today, as we know, the movement in Israel would be someone like Naftali Bennett, which, looking at what he's talking about, he's not... he's so close, his position, his sort of, you know, policy is the same as the Netanyahu administration. No difference. But the difference comes to the leverage that Israel has on the United States. I think Netanyahu was somehow the—if we can call him—the master of manipulation in the United States, because he was so effective, was so successful for many, many years in the United States, manipulating both parties, Republican, Democrats, all together, and getting benefit for Israel. But do you see that the same happening with someone like Naftali Bennett, who we know has the same sort of policies?

#Guest

Well, I think, yeah, I don't think Bennett would be much of an improvement over Netanyahu. Lapid might be more, you know, he's more of a centrist, I think, kind of a center-left leader. You know, in terms of other leaders besides Netanyahu, you know, the more centrist leaders like Lapid are, you know, they were against the Gaza War, essentially. They wanted, you know, the Gaza War to be ended because they recognized the genocide was real, and so they were a voice of reason on that. But in terms of, as you mentioned, you know, the war with Iran and especially the war with Hezbollah in Lebanon, you know, Netanyahu's opponents are, you know, right there with him. You know, they're just—in fact, they were criticizing Netanyahu for agreeing to any ceasefire at all.

So, yeah. That's why it's so problematic in terms of, you know, there's no clear opposition leader that Trump could endorse, because their policies are just as bad, you know, from the U.S. perspective, and just as likely to try to, you know, blow up the armistice deal. You know, I don't think Iran's going to break the armistice by conducting missile strikes against Israel, but obviously they are willing to reclose the Strait. They are willing to potentially suspend all nuclear negotiations with the U.S., and, of course, they're going to, you know, keep providing Hezbollah with arms and weapons, you know, to fight their war to the extent they're able to.

And that's, you know, without the loss of Syria as an Iranian proxy, that has become much more difficult. But yeah, again, I think that President Trump, his biggest leverage on Netanyahu would be to just endorse one of his opponents. And maybe it doesn't even matter which, you know, just say, hey, you know, this is your last chance. I'm going to go public and I'm going to endorse your opponent unless you immediately pull all your troops out of Lebanon. And then you're going to go to jail. You're going to go to prison. So let's figure out how to spin the withdrawal, you know, to help you get reelected, to give you the political leverage to be able to do so.

But I don't think there's any way to spin it, unfortunately, from Netanyahu's perspective, other than the U.S. forcing and pressuring Israel out of Lebanon, which would, you know, expose Netanyahu's war against Iran as just a huge loser, not just for the U.S., but for Israel as well. And it really has been, you know, in terms of militarily, there's been, obviously, limited operational successes in

degrading Iran's military, again, up to anywhere from 15% to 30%. But that's not a lot. And Iran has a massive capability to rebuild those missile stocks. You know, they could probably rebuild those missile stocks to 100%, you know, pre-war levels within 6 to 12 months. And we don't have that capability. It's going to take us five years to rebuild our missile stocks to pre-war levels.

#Nima

Yeah, thank you so much, David, for being with us today. Great pleasure, as always.

#Guest

Thanks, Nima. Always a pleasure. And let's hope and pray that this peace agreement lasts.

#Nima

Exactly. Exactly. We need that. All of us need that. Thank you.

#Guest

Thanks, Nima.