

# Europe is OVER: Russia's Greatest Shift in 5 Years | David T. Pyne

David T. Pyne, former U.S. Army officer and Deputy Director for the Task Force on National and Homeland Security, discusses the Iran ceasefire, Trump's memorandum with Tehran, the Strait of Hormuz crisis, JD Vance's role, and the future of U.S. bases in the Gulf. He also analyzes Ukraine, Russia's possible northern offensive, NATO risks, and the continued power of neocons in Washington. Links: David Pyne Substack The Real War: <https://dpyne.substack.com/> X: <https://x.com/AmericaFirstCon> Neutrality Studies substack: <https://pascallottaz.substack.com> Merch: <https://neutralitystudies.com/shop> Donation: <https://neutralitystudies.com/donate> Timestamps: 00:00:00 Introduction 00:00:27 Iran ceasefire and MOU 00:06:29 Is Trump serious about peace? 00:14:20 Will Iran enforce the deal? 00:17:25 Future of US bases in the Gulf 00:20:19 JD Vance and MAGA after Iran 00:28:30 Strait of Hormuz control 00:32:34 Russia, drones, and escalation 00:38:38 Trump, Anchorage, and Ukraine peace 00:43:02 NATO risks and neocon power

## #Pascal

Welcome back, everybody, to Neutrality Studies. Today, we're talking again to David Pine, a former U.S. Army officer and deputy director for the Task Force on National and Homeland Security. David, welcome back. Hey, Pascal, great to be on. Great to have you back. And we want to start with Iran, and we'll work our way toward Russia in just a moment. We're speaking on my Monday morning, June 29th, your Sunday evening, the 28th. As things stand now, what is your interpretation of the seriousness of the Memorandum of Understanding that was signed about 10 days ago, and the process that has been going on, which some describe as a peace process but by now really looks more like a very phony Israeli-type ceasefire situation, where neither side really stopped the kinetic phase of the war? What's your interpretation?

## #David T. Pyne

Well, I do think that it was Chas Freeman who called it a ceasefire with Israeli characteristics—namely, you know, a ceasefire that really isn't real, isn't enforced, isn't really adhered to. But I think that this memorandum of understanding, just the very fact that Trump essentially capitulated to virtually all of Iran's peace terms, demonstrates how desperate he is to end the war. And I think you wouldn't know that from the last two or three days with the tit-for-tat U.S. and Iranian missile strikes, which was resolved in, you know, maybe breaking news where you're at. Those attacks have now been halted, and both sides have agreed to meet for technical nuclear negotiations on Tuesday.

But I think that President Trump, you know, he made a course correction, and he hasn't done a very good job of adhering to it. But for nearly two weeks, he did, and he articulated a very strong, you

know, realist foreign policy justification for doing that—namely, that if the war didn't end, if the Strait of Hormuz didn't reopen, we could be facing a global depression within a matter of several months to a year. And he also talked about how, you know, Iran has the right to self-defense. He doesn't have a problem with them having missile capabilities because every other country around them does.

That they can continue to enrich up to 3.67% uranium for nuclear energy purposes. And, you know, he really talked about Iran being a normal country, which is something that foreign policy realists like you and I knew the whole time. But apparently, it was news to him. You know, the neocon perception, of course, is that Iran is the Islamic Republic of Iran. Their leaders are crazy. They're suicidal. They're irrational. This war has proven none of that to be true because Iran had, you know, five different ways they could have escalated the war, including, of course, hypersonic and supersonic missile attacks that could have sunk multiple U.S. Navy warships, destroyers, perhaps even the USS Abraham Lincoln.

And they chose not to utilize it. They chose not to escalate to that level. And just in these rounds of strikes, you know, Iran, all they did was take out, you know, the Singaporean tanker Ever Lovely's bridge windows. They shattered the windows, but they did so in a deliberate way to avoid any crew casualties. Then President Trump overreacted by striking, you know, four Iranian targets. And then there was another round—you know, Iran attacked Bahrain and another ship in the Strait that may have been Japanese, I'm not sure—and then I believe it was also the second one.

## **#Pascal**

I think so, but yeah. Okay, anyway, it was not a U.S. flag ship. It was a third-country flag ship, yeah.

## **#David T. Pyne**

Exactly. So it's a third-country neutral ship. They've been very careful not to strike at the U.S. itself or U.S. military bases, is my understanding, because they kind of have a baked-in 400 to 500 billion reasons not to restart a full-scale war with Iran, in that we've committed to providing them 300 billion dollars' worth of a reconstruction fund that is financed, you know, not by U.S. taxpayers but by other private companies and investors. And then another, you know, freeing up, of course, their 100 to 200 billion worth of frozen assets, which I thought was 100 billion. But according to Vice President J.D. Vance, actually, he's heard maybe as high as 200 billion. I think Trump has invested overall in trying to end the war, ensure the Strait remains open, at least technically.

It was obvious that when there are these types of attacks, you know, the shipping goes down to almost nothing, whether Iran says it's open or not. So essentially, it was closed temporarily by this round of U.S. missile strikes. But hopefully, it will be reopening again tomorrow. What I'm trying to say is I think I'm overall still hopeful because there's so much incentive on both sides to adhere generally to the peace terms. But I wouldn't be surprised to see further U.S. escalatory attacks in the

near future because President Trump is so unhinged. He's so irrational. He has kind of this bipolar foreign policy that we've discussed on your show, where he can go from one extreme to the other. But ultimately, his greatest fear is that he will be, as he stated, the next Herbert Hoover, and, you know, have a second depression in the United States that causes him to leave office with a 25% approval rating.

## **#Pascal**

Hey, just a very quick note. The best way to support this channel is by signing up for my free Substack. You can also help with a paid subscription there, or you can get some of our new merch on [neutralitystudies.com](http://neutralitystudies.com). Links below. See you there. You know, there is a lot of talk on the Internet about whether or not this memorandum of understanding is actually—whether Trump and his team mean it as in, yes, this is the policy we want to pursue, or if it is just another one of these diplomatic ideas, you know, these diplomatic games in order to mislead the other side.

Because one thing that it did lead to is that it kind of took away the leverage that Iran had by basically closing off the Strait of Hormuz. And we see how Iran is currently actually signaling that they're not giving that up, that they are at any time willing to reclose it, right, to get that leverage back and to signal to the United States the MOU is not going to save your main problem or solve your main problem, right? But at the same time, though, as you correctly said, the United States was willing to sign it.

And this itself was a huge kind of, you know, public admission to people like us, right, to the entire commentariat, that things really didn't go the way they were supposed to go when this operation was announced on the 28th of February this year. So overall, your assessment is, though, that he does want to wind down the war and that the fear of a depression is big enough to actually also override the neocon tendencies, which there still are within his administration. I mean, Rubio and the others, Hegseth, and even the Zionist elements within the administration, especially Hegseth. So you're of the opinion that the desire to avoid a full-scale 1929-type economic depression is overriding these other tendencies, right?

## **#David T. Pyne**

Yeah, exactly. That's why I don't think the war will escalate beyond these relatively minor tit-for-tat military strikes. President Trump, he has this opinion that if Iran does any attack, then he'll hit them back twice as hard to teach them a lesson. But the problem is there's no military solution. The war itself proved that Iran essentially has conventional escalation dominance. They don't have nuclear escalation dominance. Obviously, we have nuclear supremacy over them. Whatever nuclear arsenal they have is very modest at best. But they have the ability to retain indefinite control of the Strait of Hormuz, the Persian Gulf. The U.S. Navy, the mightiest conventional naval force in the world, was unable to dislodge them.

If President Trump were to give the orders today, the best he could do is send a bunch of ships that would get sunk, land airborne troops on Kharg Island, take control of the island, but then they would be subjected to Iranian artillery fire and all kinds of drone strikes. So I think he's finally realized and admitted with this MOU that there is no military solution. He forgets that, obviously, because he has temper tantrums. But ultimately, I think the realist view is going to become increasingly dominant with regards to Iran within the White House for the reasons that we've discussed.

## **#Pascal**

So you don't think it's a ploy, like a Minsk-type agreement, in order to gain more time to strike another day? A lot of people also think that, you know, maybe this is going to be a break for half a year, a year, but then we will continue. Because overall, you know, this type of kinetic phase of the war basically started last year during the 12-day war, right? And then it took a break, and then it became full-scale again, and now it's being put on hold again. Although the big problem the US now has is that, of course, this is now a two-way tangle, right?

The other side is also deciding whether or not they want to cease the violence. And I interpret what's happened over the last couple of days with the tit-for-tat exchange that Iran just said, like, no, no, no, no. If you don't live up to the MOU, including Lebanon, then we're going to just start the kinetic phase again, period. So you take your little Israeli dog back on its leash, OK, and you drag him out of Lebanon. Do you think the United States is going to be forced to do that now?

## **#David T. Pyne**

Well, I think that President Trump is under heavy pressure from Iran to obviously ensure that Israel adheres to the ceasefire. The problem is it's not enough. Iran has clearly stated that they want to see not just the ceasefire; they're now demanding a full Israeli IDF withdrawal, a military withdrawal from southern Lebanon. And obviously, the ceasefire does nothing of the sort. It's basically an agreement where Lebanon effectively cedes indefinite control of 20% of its territory to Israel. So yeah, I'm not sure exactly how that's going to play out. But I think that obviously Iran can use that to justify reclosing the Strait, suspending nuclear negotiations, nuclear deal negotiations.

But I'm not sure that they're going to do that. And I definitely don't think that they're going to initiate direct military strikes against the U.S. or Israel because this MOU is so good. It's so good from the Iranian perspective. It's an admission of victory on the Iranian side and defeat on the U.S. side strategically. It gives them all the funding they need to reverse the entire maximum pressure campaign that President Trump has waged, potentially all of the sanctions that we've levied on Iran over the last nearly half century. We're committing for the U.S. to directly purchase Iranian oil. You know, it's just a stunning reversal of U.S. foreign policy and an admission of defeat on the part of the White House.

So that's, that's—I don't think there's any reason or logical explanation that one could surmise that this is some kind of deceptive measure on the part of the U.S. government to, you know, buy time to rebuild our missile arsenal or anything of that nature. I think President Trump has been—he's reportedly been desperate to get out of the war since at least March 21st. So this is, you know, he's been trying to get Iran, obviously, to accept his Maxwell peace terms. And when he finally realized that that was never going to happen, around June 11th, he signed the agreement officially on June 17th at the Hall of Mirrors at the Palace of Versailles, which is very ironic because, of course, that's where the Treaty of Versailles was signed, where Germany surrendered on the basis of a 14-point peace plan presented by Woodrow Wilson.

And, of course, Iran's peace plan was also 14 points. It was enormous initially as well. But, yeah, this is going to be a rocky road. But I remain overall hopeful. I certainly have lost my respect for President Trump because, you know, he just is so inconsistent. You know, initially he was very consistently pro-peace, anti-war, and courageously America First. And he's just shown with this war that he's really under massive influence and control by Netanyahu, but not completely, because obviously if he was completely under Netanyahu's control, this deal would never have been signed.

## **#Pascal**

Yeah, the question to me is, of course, what Iran will make out of the current development, because, you know, Lebanon is, of course, part and parcel of point number one of the 14-point peace plan. Now, if the United States starts arguing that it has no control over Israel, and Israel and Lebanon came to a separate understanding, then, well, point one is already broken, right? So is that where Iran starts? Because the next thing will be that maybe point number two, point number three will be broken. And maybe the 300 billion are not disbursed. Maybe it's going to be even less. And maybe, you know, in the end, the question to Iran must be about verifiability, right?

And they set the MOU actually up in a way that it's verifiable. You can see whether or not the United States will follow what it promised. And if it doesn't follow some points, then, well, probably from the Iranian side, the question then is, well, are we just going to go back to the kinetic phase in order to demand that the MOU is being followed or not? And your interpretation is that the rest of the MOU is still good enough for Iran to not do that. But at some point, the United States will need to live up to a couple of these points, right? Or did it already live up to a couple of them? I mean, for example, the troops and ships are being withdrawn at the moment from the vicinity of Iran.

## **#David T. Pyne**

Well, Larry Johnson, a former CIA officer, has stated that his sources are saying that the order for a U.S. military withdrawal has already been issued and that there's some evidence of that. There's been a withdrawal of some air assets and perhaps some naval assets as well, down from the levels of just two weeks ago. But obviously, you know, we're going to maintain, as Vice President J.D.

Vance stated, a robust air and naval presence. We basically sent half of our Air Force and half of our deployable naval assets to fight this war. And, you know, that was insufficient to defeat the Iranians. You know, Iran—the winner of a war is the side that controls the area that remains in dispute, and Iran is in total control of the Persian Gulf and the Strait of Hormuz.

So they're the clear winners in this war, and they retain 70% of their missile force, according to U.S. intelligence, 90% of their underground missile launch and production facilities, and anti-ship coastal defense missile sites. So, you know, they really have a very robust military capability to threaten their neighbors and to compel them to essentially establish a new Iranian sphere of influence that extends beyond the Gulf and into some of the Gulf states, particularly if the U.S. decides to pull a lot of its forces back, given that Iran has destroyed or rendered inoperable 13 to 16 U.S. military bases.

## **#Pascal**

Do you think these military bases will eventually be withdrawn from the Gulf?

## **#David T. Pyne**

Yes, the price tag on some of those rebuilding efforts—I think our U.S. Fifth Fleet headquarters in Bahrain is around \$5 billion. I mean, it's just huge amounts of investment that we would need to rebuild those. Obviously, President Trump's defense budget is \$1.5 trillion, but that's very much up in the air. It doesn't have bipartisan support whatsoever. It's unlikely to pass in its current form. Certainly, I think we'll see a significant increase in military spending, but not quite near that level. But there's also a price tag that we have to pay. So it's not just funding new military capabilities, it's rebuilding what we've lost.

And that's in terms of rebuilding the half or so, almost 50% of our conventional missile arsenal, including offensive missiles and also missile defense interceptors in these bases. I think that some of them likely will be rebuilt, but I think essentially what I'm hearing is that the U.S. plans to relocate most of our military assets out of range, as far out of range of Iranian missiles as possible. So Bahrain is much too close to Iran. That will never be a functional U.S. military base again. I don't see the prospects for any manned combat ships, U.S. Navy ships, in the Persian Gulf at any point in the future because I think that Iran's control of the Persian Gulf will be indefinite.

Currently, we only have these 24-foot drone boats, autonomous drone boats that you or I could probably purchase for \$30,000 or \$50,000. So that's a very, you know, it's a very telling situation where, you know, the U.S. Navy has suffered one of its biggest defeats in its history from a country that, you know, Trump claims we sunk their Navy, destroyed their Air Force, destroyed all their missiles, destroyed their nuclear capabilities. So essentially, if President Trump were correct, we could just go into the Persian Gulf and retake it and reopen the strait without negotiations with Iran at all, and, you know, not worry about any of their military capabilities. But obviously, Trump has been very misleading in those kinds of statements.

## **#Pascal**

No, I mean, it has become completely, totally obvious by now that most of the things that he said about how the United States looks at Iran are completely mistaken, right? So we can completely discard that. But on the other hand, what we cannot discard is, of course, the future kind of strategy, that there will be a future strategy by the Trump administration and the administrations beyond. There's no reason to think that there won't be. One of the men actually right now whose personal political fate is on the line because, you know, Donald Trump's kind of—he's now over 80 and this is his second term. I mean, for all intents and purposes, this is going to be the last two and a half years of his office, right?

But the man who still has skin in the game is the person now negotiating, Vice President J.D. Vance. And when the Iran war started, I kind of wrote him off because I thought, this is it. I mean, the MAGA base is gone, and the America First thing is something that a very substantial part of that base doesn't believe anymore. I think, including you, became very disillusioned with the way that Trump went about it. But Vance is, of course, directly connected to that. But Vance is also the most anti-neocon and anti—if there's an anti-Zionist faction within the current administration, it would be him. And what do you think are his chances to somehow extend his political life beyond this conflagration?

## **#David T. Pyne**

Honestly, I think they're excellent, and they've only improved with Trump's decision to end the war on unfavorable terms with Iran because, you know, he has really gone on—I mean, he's done dozens of interviews over the past couple of weeks defending this peace deal. Obviously, it's not a great peace deal in terms of the specific terms, but strategically it does make the most sense. Really, the U.S. has no alternative. It's essentially the best alternative out of the bad alternatives we have to choose from. And, you know, he really was the voice of peace. We know from The New York Times and other investigative reports that, you know, he had a bad feeling about this.

He laid out all the risks, all of which have come true—from closing the straits to depleting our missile arsenals to, you know, Iranian missile strikes and our allies' attacks, the destruction of U.S. military bases—which, ironically, was the rationale that, you know, Trump and Rubio started the war on, that we had to prevent attacks on our military bases, when in fact our entry into the war is what guaranteed their destruction. So that was a really foolish decision that was very self-defeating on the part of the White House. But, you know, I think what this war has shown is that you had voices like Sean Hannity and even Lindsey Graham, you know, hardened neocons, Zionists, that really just went with the flow. You know, President Trump did a 180-degree flip-flop where he's like, we're going to destroy Iran.

You know, we're going to fight this war indefinitely until Iran is obliterated. You know, now he's saying Iran deserves nuclear enrichment and missile capabilities and self-defense capabilities and

everything. It's OK if they control the strait as long as they don't charge a fee. You know, all these types of conciliatory statements. And Sean Hannity and especially Lindsey Graham, who said that, you know, the very terms of this agreement that were released on May 23rd in the press, he said would be a disaster for Israel, you know, raises the question of why did we start the war in the first place? And now he's basically kissing Trump's butt and saying, yeah, this is the best option.

## **#Pascal**

Lindsey Graham, did he now turn around actually? Because the last time I heard from him was last week when he was still saying that, oh, if they don't open the strait, we're going to obliterate them. And, you know, I mean, with what weapons? But okay, fine. I mean, he was still doing this bombastic kind of speech. So did he by now actually say, like, no, Trump is doing the right thing?

## **#David T. Pyne**

He did, yeah. He said he trusted Trump in the peace process and supported it. What happened?

## **#Pascal**

How did anyone constrain Graham? Because that guy's a loose cannon.

## **#David T. Pyne**

Well, I think Lindsey Graham has become really just kind of a Trump cultist, essentially. He just goes with the flow for whatever Trump says. And I think that there were behind-the-scenes talks where President Trump said, you know, look, this is what's happening. I don't care if you criticize me. I'm doing this. And, you know, he wouldn't release the terms of the agreement to the Israelis. I'm sure the Israelis had covert sources that were able to get their hands on the terms. He wouldn't release it to the Senate. He obviously had many Senate neocon Republicans that were very opposed to it. He made sure he signed it. He announced it and signed it electronically on the exact same day. And the terms, of course, were publicly released by the White House on Wednesday, which was just mere hours before he signed it in Paris at the G7 summit.

## **#Pascal**

So, and, you know, if you put it this way, I mean, it might actually have been important that he was outside of Washington, that, you know, the others wouldn't interfere, right? That he actually had the leeway of saying, like, OK, give it to my desk now while I'm out of that circus, and Graham cannot jump into my office before I do it. Do you think something like that is possible, thinkable, or just coincidence because he was at the G7?

## **#David T. Pyne**

Yeah, no, I mean, I think that he's known for some time. He's expressed fear since at least April that this could be disastrous. Obviously, the longer the war continues, the worse the economic ramifications will be in terms of causing another recession. The more seats the Republicans will lose in the House and Senate. So it just really was a losing proposition. There were just no prospects for victory. And this is something I stated in an article on the Real War Substack two weeks before the war broke out. I said, there's just no military solution or way that we can achieve any of Trump's stated war objectives. And I think that was proven true. He had like six different war objectives. Not one of them was achieved. The closest he came was, you know, sinking all 11 of the Iranian Navy's surface combatants.

Most of their submarines are still intact. Obviously, they have thousands of fast missile boats with anti-ship missiles that have ranges of 35 to 40 kilometers that can blow holes in tankers and even U. S. warships. So I just think that it came to a point where he knew that this could be disastrous for his presidency, and he'd been trying to end it for three months. And like you said, maybe he got away from the White House and felt more secure in essentially telling his allies that this is happening. You need to support it. Here are the talking points. And, you know, Vice President Vance obviously has led the way in that as well with Sunday talk shows, over the last interviews over the last couple of weeks. And that's the thing about MAGA — MAGA is not ideological. It's whatever Trump says it is. And Trump stated this.

So, you know, there are some America First ideologues in MAGA. I was one of them. Obviously, I'm not coming back to that. But there are also, you know, some neocons, but they're all united by their support of whatever Trump says. That's the best thing to do. So all we need to turn around that ship is for Trump to chart a more realistic course. And he did that with the MOU. And he also did that even though he started these escalatory attacks on Friday, he ended them 48 hours later. So he both started the escalation and he ended it because Iran was the last country to attack U.S. allies. I think it was Bahrain and Qatar. And he's like, OK, that's OK. Let them have the last word. This isn't going anywhere. This is going to be daily missile strikes, tit for tat. So he was wise enough to put an end to them with a halt to the strikes.

## **#Pascal**

Yeah, so does that then indicate that, you know, because it started with these tankers trying to go through the Strait without actually paying the fee, right? Both of them tried to go through basically the Omani part of the Strait, and the Iranians stopped that with their weapons. And then in reply to that, the U.S. struck these facilities, and then the Iranians escalated back against Bahrain and Syria.

## **#Pascal**

Against the U.S. facilities there, right? So thereby now, is the conclusion that we have as of today, okay, no, Iran is in control of the Strait. If they say you don't pass, then you don't pass. And Trump now basically said, okay, fine, fine, he's been backing off. Is that the conclusion?

## **#David T. Pyne**

Well, Trump, yeah. So the word from a U.S. official in the article I read just before this interview is that the attacks will be halted for now. So they're clearly implying that, you know, the White House maintains leverage in terms of the flexibility to restart the attacks based on Iranian behavior. And you're correct that Trump is trying to circumvent Iranian control of the Strait by establishing an alternate channel along the Omani coastline. And this Singaporean tanker, the Ever Lovely, was hit by a drone, but it successfully transited through the Strait.

So essentially what Iran was doing was not trying to really cause any serious damage against the ship, but simply to serve as a warning shot, because all they need to do really is have these warning shots. The last time two U.S. Navy destroyers tried to enter the Gulf last month, all they had to do was bracket them with drones and missiles on each side of the ship to indicate that, you know, we could destroy you, we could hit you if we want. This is strategic signaling that if you continue through the Strait, we will strike you. And so that message alone is enough, Iran believes, to compel the ships to try to avoid getting struck and to go through the channel that they've designated.

## **#Pascal**

Yeah, and something that I yet need to learn is whether or not these ships actually had insurance, or whether the insurance or some guarantee for insurance was provided actually by the U.S. government, you know, which would make it just exorbitantly expensive if that state of affairs was to continue. These are all the things that we don't know yet about. And of course, the Strait needs to be open for massive numbers of ships to pass on a daily basis. One or two a week just won't do, right? So the Iranians, by threatening one ship, they, of course, threaten hundreds of ships. And if the insurance doesn't come back, if the United States would need to step in, that would be a completely disastrous course of action. So all of these things we don't know yet. But you're... just to conclude this part of our discussion, your assessment is, no, no, no, the United States is pretty serious about this because it is also pretty desperate.

## **#David T. Pyne**

Absolutely desperate. Yeah, Trump, obviously, he paints everything he says as a victory. You know, he claimed that the MOU, which I've assessed as a conditional U.S. surrender to Iran, in fact, was an unconditional surrender to the U.S. You know, so he always spins it as a victory. Everything that happens, you know, he spins the U.S. as superior to Iran, which essentially has proven to be a near-peer competitor or, you know, a regional great power. But yeah, in fact, I think he's committed to trying to wind things down.

## **#Pascal**

Then let's shift gears a little bit now and talk about Russia, because another thing that's escalating at the moment is the drone war, and something that worries me deeply, deeply, is that right now we're seeing in Western media, including Foreign Affairs magazine, but also in other corners, we're seeing a narrative emerge in which the Western side is actually saying that they're winning, and Ukraine is winning, and Putin is on his last leg. Foreign Affairs literally published an issue with Putin drowning — and “beware of the drowning man,” you know, he's drowning and he's losing, but he might lash out and whatnot. And this, to me, looks very much like preparation for an escalation of the war, actually, that can be very much provoked. And all of these drone attacks into Moscow and whatnot are huge provocations that elicit kind of a counter-strike against NATO territory. How do you see what's currently happening in the Russia theater?

## **#David T. Pyne**

Well, I think certainly we have seen some success in terms of Ukrainian drone attacks on Moscow and on Russia's energy infrastructure, their oil reportedly reducing their oil output by up to 10%. So those are certainly victories on the Ukrainian side. However, in terms of the actual battlefields, my assessment is that Russia likely has about four times more troops than Ukraine. Ukraine's lost a million dead soldiers, over a million, another million or so seriously wounded, unable to return to combat service. And their army is likely down around 150,000 to 200,000 at most, while Russia has, by last report, according to the Ukrainian general staff, about 713,000 troops inside Ukraine.

The bottom line is, yes, there have been, you know, Russian threats of conventional missile strikes and even nuclear strikes on EU countries for continuing to provide Ukraine with, obviously, battlefield support in terms of offensive intelligence and drones and missiles. But ultimately, Russia doesn't need to — there would be no utility whatsoever for Russia to engage in any direct kinetic strikes against the EU, because the solution has always been for Russia to stage a massive northern offensive to either take all of northern Ukraine on the left bank of the Dnipro River or else reinvade Kyiv itself.

And it's interesting that Zelensky has made these threats against Belarus, which has been really foolish, I think, because obviously if Ukraine were to engage in cross-border attacks against Belarus, Putin would be forced to send a couple hundred thousand Russian troops, maybe even 300,000, to reinvade Kyiv, and then the war would be over within 30 to 60 days, because that's always been the way to get Ukraine to capitulate. There are really two options. One, of course, is to detonate a small-scale nuclear weapon over Kyiv that doesn't kill anyone but wounds several thousand, but puts the fear of God in Volodymyr Zelensky, the dictator without elections in Ukraine. But the more conventional way has always been a northern offensive, which could either invade through Sumy or Chernihiv Oblast, or Kyiv Oblast itself, which would force the Ukrainian army to evacuate all its positions in the Donbas region in southeastern Ukraine.

## **#Pascal**

So overall, you're not too worried that an escalation of the war might be imminent, as you still think the battlefield advantage is with the Russians?

## **#David T. Pyne**

No, I think an escalation of the war is highly likely. I just think the escalation won't come through direct Russian kinetic strikes on the EU. I think they'll come on Ukraine. There have been several indications that Putin is under much more serious domestic political pressure to, you know, end the war with a victory, a clear victory by the end of the year. So my assessment is that we're likely to see a massive Russian northern offensive, probably not to Kyiv. I think it would probably be Sumy and Chernihiv once again, which would essentially force most Ukrainian troops to flee across the other side of the river.

I don't think the Russians will go through Odessa. I know a lot of other analysts, like Colonel Lex McGregor, have been saying that the Russians want Odessa. I don't think they want that. I don't even think they want Kyiv. My Russian sources have been saying that the reason Putin has not made another move on Kyiv, like he was able to do at the beginning of the war that almost forced Zelensky to sign the Istanbul Agreement, until Putin inexplicably decided to withdraw all Russian military forces from the northern 30% of Russian-occupied territory, is that he fears NATO would intervene directly, militarily, if he were to do so.

Essentially, if Russian troops were about to take control of the capital and were invading that close to NATO countries. And so I think that Putin is still reluctant to do that. I don't understand why he's fearful to do that, because I think the chances of any direct NATO intervention are extremely minimal. President Trump has made clear that if Britain and France send troops into Western or Central Ukraine, they'll do so without Article V protections, meaning that the Russians could target and destroy, kill tens of thousands of British and French troops, and the U.S. would stand by and do nothing except send them more weapons.

## **#Pascal**

So what is the position of the United States at the moment? Last year, in August, Anchorage and the Russians for the longest time actually talked about the spirit of Anchorage. Foreign Minister Lavrov only recently said that spirit is now conclusively dead and gone. But what is the U.S. approach? It seemed as though there had been an understanding in Anchorage and the Russians were waiting for that to be realized. And again, it didn't materialize, obviously, for them. What is Mr. Trump doing? I mean, his whole campaign was about ending the Ukraine war. And of course, it's far from being ended. We are waiting for the next phase of escalation. What's your assessment there?

## **#David T. Pyne**

Well, as I've always stated, I think that the solution has always been to send J.D. Vance to meet with the Russians and hammer out a bilateral peace deal, essentially a separate peace that would not involve Ukraine or EU countries, between the U.S. and Russia on mutually acceptable terms, minimally acceptable to the Kremlin. And that could be done in 24 to 48 hours. President Trump would just need to give the word. And then once that agreement was signed, he could have the ability to essentially force Zelensky to implement it by cutting off all U.S. military assistance, including offensive, maybe even defensive intelligence assistance, and most importantly, Starlink access. Yeah.

## **#Pascal**

But the fact that that's not happening, the fact that for one and a half years that hasn't been happening, because that is something that he could do indeed. I mean, this is what we thought Anchorage would be about, but it turned out not to. Doesn't that tell us that for all the possibilities that a president has to do things with the stroke of a pen, apparently the apparatus in the White House and the wider political world of Washington doesn't allow that to happen?

## **#David T. Pyne**

Yeah, and we've seen that. You're absolutely right. So basically, Marco Rubio said the spirit of Anchorage is dead, that the U.S. has reversed its position and no longer supports the return of the 20 percent of western Donetsk that's still under Ukrainian control back to Russia as part of a deal. So he stated that we're not a neutral mediator. We're not pretending to be a neutral mediator. Obviously, the U.S. was never a neutral mediator. We've always been fighting on the Ukrainian side and pretty much going all out in doing so. Trump actually has signed an agreement with Ukraine, has supplied them with, I think, 3,800 long-range air-launched cruise missiles that could strike deep inside Russia, fired by Ukrainian F-16s that are piloted by former U.S. Air Force combat pilots.

So I haven't seen that there have been any deliveries on that. But there clearly has been a shift back to the neocon side with regard to U.S. support for Ukraine. Now, granted, the amount of U.S. military assistance going to Ukraine has overall decreased by about 80 percent. We currently only give them about 12 billion a year. Biden's last year, in 2024, we gave them 61 billion a year. And it's all through third parties. Theoretically, we are not giving any direct military aid to Ukraine; it's all being funneled through NATO countries.

Of course, that doesn't make a difference. You know, that's just window dressing—Trump trying to say that we're not giving them massive amounts of money and arms anymore. But ultimately, you know, the outcome of the war is baked in. You know, Russia could have won the war if Putin had not ordered the withdrawal of all Russian forces from northern Ukraine from March 26th, 2022, to

April 4th. The war would have ended April 9th with the signing of the Istanbul Agreement because Zelensky would have had no choice, with Russian armored columns two miles from the city of Kyiv and surrounding Kyiv from three different sides on both sides of the Dnipro River.

## **#Pascal**

Yeah, although, you know, winning the war, in my view, for Russia always meant coming to a political agreement with Ukraine and with the West in order to create some form of security structure. I mean, the war is not over unless it is over for good. So the whole Istanbul affair was about forcing an agreement that both sides would then be forced to live up to. And for Ukraine, it would have been a verifiable form of neutrality, right? That they don't join NATO, period. But we are very far away from that. And it seems to me that the longer this goes on—we are now in the fifth year—the closer we get to what Hillary Clinton pitched at the very beginning in February 2022, which is, let's make this into another Afghanistan for the Russians, right? Let's prolong the war as long as possible.

And that's just Friedman, the sentence that he coined: "fight to the last Ukrainian," and just make sure that Russia constantly has to bleed. And as we are seeing now, the Russians are bleeding while the Europeans are trying to rearm. How successful that is going to be is another question, but the Europeans have time to rearm while the Russians are bleeding. So if you look at this from the perspective of there maybe being a bigger war by 2030 or 2035 or whatnot, it doesn't look very good for Russia. And I suppose that parts of the Russian establishment actually do understand that this might be on the cards, right? That once Ukraine is completely exhausted, well, they're just going to enlarge the war to the entire continent. How do you see that fear?

## **#David T. Pyne**

Well, I think the very fact that Putin has refused to take Kyiv when he easily could have done so any time in the last two years indicates to me that he has no intention whatsoever of fighting a direct war with NATO. I think he's understandably concerned about that. I think Russia would win such a war, but it could do so at great cost. And so Putin is very rational and restrained. You know, he's really turned out to be one of the more moderate politicians and leaders in Russia. There are so many more hardliners like Dmitry Medvedev that probably would have used nuclear weapons, certainly on Ukraine by now, and the war would have been over for Russia in terms of an unconditional Ukrainian surrender to the Russian Federation.

So I think that—I really do think that—I don't want to say that you're safe from Russian strikes, but I think that the strikes would most likely be, you know, counter-space: Russia taking out Western satellites, massive cyberattacks. Probably not massive at first, but major Russian cyberattacks. We haven't seen that. That was something I was thinking would likely happen against Ukraine initially to

ensure that Russia defeated them within a few weeks, because that's what U.S. intelligence was predicting at the time. So, you know, clearly Putin has been forcing the Russian military to fight with one hand tied behind its back.

And that's why this war has taken so long to fight, because he has been very reticent to, you know, win the war too decisively, fearing NATO military intervention potentially. But on the other hand, Russia has been very successful over time in bleeding the Ukrainian army dry. So their demographics and their manpower are almost virtually exhausted because Russia, according to the estimates that I've seen, has incurred 4.5 times fewer military casualties than they inflicted on the Ukrainians. So in the West, we hear the exact opposite. It's, you know, Ukraine is... you know, despite the fact that they're outnumbered, you know, 5 to 1 or 4 to 1, you know, 10 to 1 in artillery, 12 to 1 in fighters.

I mean, just across the board, you know, we're told that Ukraine has killed far more Russians than Ukrainians. And the truth is the exact opposite. And the administration knows that. They don't have a clear picture of Russian casualties, but they certainly know that Ukraine has lost a million dead and a million seriously wounded, and that defeat is inevitable. And, you know, President Trump had a private meeting that was leaked to the press that he had with Zelensky, and he was very profane, and he threw the map of the Donbass on the floor and told Zelensky that he needed to accept Russia's very reasonable peace terms or else Ukraine would be destroyed.

You know, he'd be ousted right down the line. And then he walked out of that meeting repeating Zelensky's talking points that, you know, we shouldn't give up the Donbass region. You know, that's only 1% of Ukraine's territory. So President Trump, you know, he shows that he's got some level of political courage, you know, in private meetings. Obviously, he's cussed out, you know, Benjamin Netanyahu. But then, you know, he comes out of the meeting, and he really demonstrates very little political courage.

And that's really the problem, is that the neocons, you know, he's appointed like six neocons that are just hardcore Zionists, hardcore warmongers that want to perpetuate the Ukraine war, that want to keep fighting the Iran war. And so he's kind of boxed himself in because all the advice he's getting, outside of J.D. Vance, with Tulsi Gabbard gone, it's essentially just J.D. Vance at the cabinet level that's telling him he needs to pursue a more restrained policy that makes us safer and more secure instead of fighting all these endless and unnecessary wars in Ukraine and Iran. Yeah.

## **#Pascal**

For us, encouraging some of these developments is, especially when it comes to the talk about peace, and that talk is completely different from the realities that have been materializing, unfortunately. But overall, the neocons are anything but gone from the administration. They're deeply entrenched. And as people on The Duran usually say, they have no reverse gear,

unfortunately, and we shouldn't expect that to happen anytime soon. So the realities of the battlefield and of the capabilities will probably decide what's going to happen. David, people want to follow your work. Where should they go?

## **#David T. Pyne**

Yeah, the Real War Substack is where I post my more substantive deep-dive articles, and that's at [dpyne.substack.com](https://dpyne.substack.com). Once again, [dpyne.substack.com](https://dpyne.substack.com). And I also post daily, multiple times daily, at LNX at America First Con. See you then.

## **#Pascal**

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

## **#David T. Pyne**

Thanks, Pascal. Always a pleasure.