



Prof. Mearsheimer - Trump Is Trapped in Three Losing Wars

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Intro: There is no available solution that is favourable to the United States. The United States is going to lose in all three cases. The West is leading Ukraine down the Primrose path. And the Israelis are executing a genocide in Gaza. It's not China's fault that it wants to be powerful. So if you get into trouble and you dial 9-1-1, there's nobody at the other end.

John Mearsheimer: Hi, this is John Mearsheimer and the subject I'd like to talk about in today's episode is President Trump and his wars. I'd like to talk about the wars that he has been involved with since he came back into the White House on January 20th of 2025. In fact, it's been 21 months tomorrow since he moved back into the White House. And the argument that I'd like to make today is that in his first year in the White House, back in the White House, from January 20th, 2025 up to January 20th of this year, he actually fared quite well in terms of the wars that he was in good part responsible for managing. But in his second year, and that of course only includes nine months because he's not finished his second-year in the White House, but in the nine months since January 20th, 2026, he has gotten himself into a series of disastrous wars. These are wars that he's responsible for.

Now let me briefly describe what happened in the first year and compare it to what's happened so far in the second year. In the first year, there was no question that he inherited the Ukraine war from Joe Biden. And he was not largely responsible for that war in the initial period after he moved into the White House. It was Biden's war. And what he was interested in doing was shutting that war down. And he actually made a significant effort over the course of his first year to try to shut the war down. He, of course, failed almost completely and the war went on. But I think one could argue that in the first year, the war was really not his at that point in time. Then he did wage a war against Iran in June of 2025 with the Israelis. This was the 12-day war that went from June 13th to June 25th of 2025. And it was a quick war. In fact, the United States bombed Iran for only one day, and it did end after 12 days, and he was able to declare victory and that was the end of that conflict. One might argue that

there was the war against Venezuela in early January of 2026, but that really wasn't a war. That was a kidnapping operation. But nevertheless, it was successful. And more generally, what he avoided doing in that first year in office was starting another forever war. And this is in good part because he stayed away from trying to do regime change. One might say that wasn't Venezuela a case of regime change? Well, the answer to that is no, because all Trump did was kidnap Maduro and replace Maduro with his Vice President. So, there was no regime change in Venezuela. There was leadership change for sure, but the important point is it was not a war in any meaningful sense of that term. Again, it was a kidnapping operation.

So you see when you get to about January 20, 2026, which is, of course, when his second year in office begins, he looks like he's in pretty good shape. He has not gotten himself into any trouble. Looks like he won a victory in both Venezuela and in Iran. And as I say, the Ukraine war, he can argue up to that point, is Biden's war. And yes, he's inherited this war, but it was Biden who started it, and he can't be blamed for what's going on. This situation changes after January 20th, 2026, the start of this year. First of all, it then becomes hard to argue that this is Biden's war. Trump has been in office for a year and he is managing the war, or to put it in slightly different terms, he's waging the war. And I think that he owns the war once his first year in office is over with. An analogous situation I think drives this point home is what happened in Vietnam. There's no question that LBJ started the war in the spring of 1965, and of course, he left the White House in January of 1969, and he was replaced by Richard Nixon; the war was not immediately Nixon's war, but as time wore on, it became Nixon's war, and Johnson and Nixon were both responsible, and that's the key word. Both were responsible for what happened in Vietnam. Of course, Johnson got us into the war and Nixon did not, but Nixon took over the war and it became his war every bit as much as it was Johnson's war. And the same thing has happened with Ukraine. Trump inherited this war from Biden. It wasn't his war at first, in my opinion, but at this point in time, certainly after January of this year, it became his war, he owns it.

Second war, which he starts by himself, is the war in Iran. And of course, this is on February 28th of this year that the Israelis and the Americans attack Iran and initiate a war that is ongoing. Then the third war that he is in part responsible for is the war between the Houthis and the Saudis. What happens there is that the Saudis are thinking about attacking the Houthis. You want to remember that the Saudis and the Houthis had fought a big war between 2015 and 2022. And that war had ended in 2022 and bad relations remained between the Houthis and the Saudis. But the Saudis then decided that what they were going to do was attack the Houthis, this of course happened on July 15th. But before the Saudis attacked the Houthis on July 15th, they asked President Trump whether he would give them the green light. And Trump gave them the green light. In fact, President Trump was enthusiastic about the idea of the Saudis attacking the Houthis. And of course, what happened is that the Saudis attacked the Houthis and that war has now escalated in a significant way. And this in a very important way is Trump's third war.

So what you see is that Trump now owns the Ukraine war, he obviously owns the Iran war, and he in good part owns the Saudi-Houthi war. He is responsible for these three wars and

these three wars are all disasters. They're all disasters for President Trump, they're all disasters for the United States, and one could easily argue that they're disasters for the world. Now why do I say these wars are disasters? There's four main arguments that I would make, and one ancillary point. The four arguments that would make as to why these wars are disasters is number one, there is huge potential for escalation in each of these wars, and we're talking here about dangerous escalation. And when we talk about escalation, you want to understand that there is potential for horizontal escalation, as well as vertical escalation. Horizontal escalation is where other countries come into the conflict. You see this, and I'll talk more about it, of course, with regard to the Houthis and the Saudis. What's happened in that war is that Pakistan, Turkey, and now Egypt have all come in on the side of the Saudis against the Huthis. And of course the United States has been helping the Saudis behind the scenes as well. So that's a case of horizontal escalation. It's a cause of other countries coming into the conflict. But you also have potential for vertical escalation, that's escalation that takes place inside a particular conflict. And you really see this in a quite stark way in the war in Ukraine, where there has been recently a great deal of vertical escalations. And the potential for vertical escalation down the road is very great. And by the way, there's also potential for vertical escalation in the case of the war between the Saudis and the Houthis, which I'll talk about shortly. So what I'm saying is that these wars are a disaster for one reason, having to do with escalation, they're also a disaster because of the damage that you're doing to the international economy. I'm sure that everybody's fully aware of the consequences of the war in Iran and what damage that has already done to the international economy, but it's very important to understand that the war between the Houthis and the Saudis is also having an effect on the international economy. And indeed, the war between Russia and Ukraine is having an effect on the International economy. And this, of course, is why President Trump is working overtime to try to shut that war down and to create a situation where more Russian oil and gas and diesel gets out into international markets. So what you see here is that the conflict involving Iran, the conflict involving in the Houthis, and the conflict involving the Russians, all three of those together have a significant effect on the international economy. So, these three wars that President Trump is responsible for are not only dangerous because of the threat of escalation, but they're especially dangerous because of damage that might be done to the international economy.

The third point I'd make about these three wars is that there is no available solution that is favourable to the United States. The United States is going to lose in all three cases. I'll talk more about this as I go along and examine each of these wars, but the United States has no war-winning strategy against the Russians in Ukraine, against the Iranians, or against the Houthis in their fight with the Saudis. The fourth point I would make is that of course, these wars are going to all end at some point in time. They're not going to go on for forever, obviously. But what you're going to get in each case, in all likelihood, is a frozen conflict. And each of those frozen conflicts is going to be fraught with the danger of escalation. Not only the danger of those wars restarting, but the danger of those wars spilling over into other areas and leading to other conflicts that are present in the wake of these conflicts once they're frozen.

And the final point that I would make, this is my ancillary point, is that you want to understand that these three conflicts are all taking place in the context of a multipolar world where you have great power rivalries at play in the international system. We now have a world where there are three great powers. One is China, two is Russia, and three, of course, is the United States and relations among those three great powers have real potential for conflict. I mean, security competition is endemic to great power politics. And it's important to understand that each one of these three conflicts, and this is especially true of the war in Ukraine, is in very important ways related to the competition among the great powers. And the potential for great power war, and again, you see this very clearly, in the Ukraine war is real. So you wanna keep that in mind that these are just not localised conflicts, that these conflicts are related in important ways to the whole subject of great power politics. Now, what I'd like to do is I'd like to look at the three major conflicts that President Trump is responsible for. The Iran war, the war between the Houthis and the Saudis and the Ukraine War. And I'd like to use my basic framework that I just laid out to you to examine each of those conflicts. I'll start off by describing where we are with each of these conflicts, then I'll talk about the potential for escalation in each one, I'll talk about the damage being done to the international economy, I'll talking about the fact that the United States has no winning strategy, it has no solution for winning those wars in ways that would be favourable to the United States, and then I'll talk about the frozen conflicts that are going to ensue once the shooting stops in each of those three wars.

Let me start with the Iran war and talk about where we are today. The Iran war started, of course, on February 28th when the United States and Israel attacked Iran. And we thought that what would happen is that we would win a quick and decisive victory. We launched a strategic bombing campaign that was aimed at decapitating the regime and creating regime change that would lead to an Iran that would throw its hands up and surrender to the United States. It was believed that this would be done rather quickly, maybe a few days, a few weeks at most. That didn't happen and we ended up with a 40 day bombing campaign that went from February 28th to roughly April 8th. Then once the bombing campaign stopped and you got effectively a cease fire, which then broke down, the United States put a blockade on Iran. This blockade lasted from roughly April 13th up until a Memorandum of Understanding was signed between the two sides on June 17th. And it looked at that point when the Memorandums of Understanding was signed that the United States and Iran would reach some sort of peace agreement or some sort of agreement to end the fighting and negotiate a final settlement. That did not happen, and instead what happened is the fighting started up again.

And you had two tit-for-tat campaigns between the two sides. These were low-level air campaigns. Remember, you started with a 40-day bombing campaign, which involved serious strategic bombing on both sides. But that ended, of course, on April 8th. And once the first blockade, you then start a tit-for-tat war. The first one is July 8th to July 29th, and the second one is August 30th to September 9th. So you have these two tit for tat campaigns. They don't work to produce a meaningful agreement between the two sides. The United States believes that it can engage in these tit for tat strategies and coerce the Iranians into agreeing to a deal

on our terms. That just doesn't work. And actually, what then happens is that the United States goes back to another blockade. And when that blockade doesn't work, we decide to add on to the blockade what I like to call the Bessent strategy. This is where the Secretary of the Treasury, Scott Bessent, comes up with this strategy for strangling Iran economically. He believes that he can get countries all across the world to cut off all their economic intercourse with Iran, Iran can be completely isolated economically and that economic isolation, coupled with the blockade, which of course feeds into the isolation, will bring the Iranians to their knees.

So what you see here at a macro level is that we start off with a strategic bombing campaign that fails. We also engage in two tit-for-tat strategies. These are low-level bombing campaigns. Neither one of them work. We have one blockade from April 13th to June 17th, that doesn't work. Then we institute another blockade on July 14th, and by itself that doesn't work. So we then try the Bessent strategy as well on August 24th. And in fact, today, what is in place is the Bessent strategy plus the blockade; very important to understand that the United States has not used military force against Iran in any meaningful way since September 9th, which is when the second tit-for-tat campaign ended. So we're relying at this point in time on economic pressure to get the Iranians to concede. I would note that there is no evidence that the Bessent strategy is working and there is no evidence that the Iranians are about to surrender. In fact, if anything, it looks like the opposite is true, that the Iranians are as determined as ever to win this war to defeat the United States. So the war is definitely ongoing at this point in time, despite the fact that the United States has tried all these strategies.

I might just add very quickly that there has been talk along the way that the United States might turn to a land option, and that would of course involve invading Iranian territory with ground troops. That has never been a serious option, and there's no evidence that that is a serious option moving forward. So that's the basic story about what has happened since February 28th in Iran. Now let me take my basic template and talk about the dangers. Start with escalation. Actually, if you look at what's happened since February 20th and since the air war ended on April 8th, what you see is that there has been de-escalation at the military level over time. There has not been escalation in terms of military force. Once the strategic bombing campaign ends, the 40-day bombing campaign, we engage in two tit-for-tat strategies. That's not escalation, that in a very important way is de-escalation, we're using less military force. And those two tit-for-tat campaigns are unsuccessful, and they both come to an end. And the second one ended, as I said, on September 9th, and there is actually hardly any fighting now taking place between US military forces and Iranian military forces. So if you go back to February 28th and you ramp forward to the present, what you see is a pattern, not of escalation, but a pattern of de-escalation.

Now, the real problem is the threat of escalation down the road. It's the possibility that the United States may decide that it's in a desperate situation and it has no choice but to escalate. I believe, as I've argued many times before, that the United States does not have a military option, that it does not make sense for the United States to go back to using military force,

that escalation by the US military doesn't provide a war-winning solution. But one can see all sorts of evidence that the Trump administration thinks that it might make good sense at some point to roll the dice and to use military force against Iran to try to rescue the situation. Because you want to remember what I'm saying here; the economic pressure that the United States is bringing to bear on Iran is certainly having a significant effect in terms of punishing the civilian population, punishing the economy in Iran. But it is not causing the Iranians to surrender. And the United States, and here we're talking about the Trump administration, of course, may very well conclude that it has to go back to using military forces. Yes, it's not likely to succeed, but there's a small chance it might succeed, we are desperate and therefore we will roll the dice. And if you listen to President Trump and his advisors speak, they frequently talk about using military force after the midterm elections in November. And there's even talk about using military force before the midterm elections so that President Trump can signal to the American people and to the world and to the Iranians that the United States is serious about winning this war. So there is a chance that the United States will escalate.

There's also a chance that the Iranian will escalate. Why do I say that? Well, there's no question that the United States is causing great harm to the Iranian economy. And the United States is dedicated to wrecking that economy and wrecking Iran. Now, it's hard to say whether or not that strategy will succeed in any meaningful way. But let's assume that it does succeed. Let's assume the economic pressure that the United States is bringing to bear on Iran is so great that the Iranians feel they have no choice but to escalate. In other words, the Iranian's understand that their economy is being wrecked and they're not gonna allow that to happen. And given that they have a second strike force and that they can attack other states in the Gulf and cause enormous damage not only to those states but to the international economy and therefore the United States, the Iranians may very well escalate because they feel so seriously threatened at home. So the key point that I'm making here is that although we see a pattern of de-escalation, since the 40-day bombing campaign ended, that does not mean that we will not have escalation in the future. It does not mean that Donald Trump will not start the war up again, or that the Iranians might find themselves in a position, because the economic pain is so great, that they believe that they have to up the ante by escalating and attacking countries in the Gulf and causing great pain to those countries and to the United States, and therefore forcing the United States to back off.

So it's very important to understand that the potential for escalation in Iran is very real. Then there's the second point that I would make in my framework, and this has to do with the international economy. There's no question that the Iran war is having a huge effect on the state of the international economy, and it is having a clearly negative effect. The United States has argued for a few months now that we are turning the tide against the Iranians. But if you look at what's happened in the month of October, it's quite clear that Iranian attacks on ships in the Strait of Hormuz in the Persian Gulf itself and in the Gulf of Oman have ramped up. And in my estimation, I think probably about 30 cargo vessels and oil tankers have been attacked successfully by the Iranians since October 1st, and there's all sorts of evidence that there are real problems getting ships out of the Persian Gulf. And furthermore, the cost of

getting ships out of the Persian Gulf has escalated greatly. On February 27th, it basically cost \$3 per barrel for ships coming out of the Strait of Hormuz, that's now up to \$30 per barrel. It is very expensive for these shipping companies to move oil, gas, diesel out of the Persian Gulf. So the economic consequences here are severe and there's no evidence that they're easing at this point in time.

Then there's the whole question of whether or not the United States can win this war. In other words, does the United States have a strategy? Does it have a solution for winning the war? And the answer is no. The United States is gonna lose this war, and this is, I think, most clearly reflected in the Memorandum of Understanding that was signed between Iran and the United States on June 17th. If you read that Memorandum carefully, it's basically a surrender document. The Iranians won, as is reflected in the 17 June Memorandums of Understanding. Now, it's obvious that the United States walked away from that Memorandum of Understanding. Even though President Trump signed it on 17th of June, he did not stick to the agreement. And of course, he did not stick to the agreement because he understood full well it was a surrender document. And he could not bring himself, especially given the political forces arrayed against him inside of Washington, to accept that Memorandum which he had signed, so we walked away from it. But the point is, he signed it because he understood that the Iranians were in the driver's seat.

Now, one could argue that since he walked away, our situation has improved. But as I made clear in my initial comments about where we are in Iran today, that is not the case. We're not in a better situation today than we were when we signed the Memorandum of Understanding on June 17th. And in fact, I would make the argument that President Trump would have been better off sticking to the Memorandum of Understanding and that he's gonna get a worse deal moving down the road. So the main point that I'm making here is that the United States is gonna lose this war and we are in no position to rescue this situation. My fourth point is what you're gonna get once the war stops is you're going to get a frozen conflict in Iran. And once you get a frozen conflict, you're going to find that this situation is fraught with danger. Now, why do I say that? First of all, it's very important to understand that Israel views Iran as a mortal enemy. And Israel is deeply committed to doing everything it can to wreck Iran, to cause Iran truly serious trouble. It's hard to imagine that there's gonna be any sort of modus vivendi between Israel and Iran. And because Israel has enormous influence in the United States through the Israel lobby, the United States will not be able to reach any kind of meaningful accommodation with the Iranians over time. The Israelis will push the United States to have a confrontational relationship with Iran. It's hard to imagine any sort of meaningful peace agreement between Iran and the United States simply because of pressure from the Israelis and from the lobby inside the United States.

To take this one step further, there's the whole question of the nuclear issue. When the war first started on February 28th, much attention was paid to Iranian nuclear capabilities. Iran had a significant nuclear enrichment capability and both the United States and Israel were deeply committed to ending that nuclear enrichment capability. And for sure, we were both, both countries, that is, deeply committed to making sure Iran did not acquire nuclear

weapons. Well, I would note that we have no nuclear agreement now. We have no nuclear inspectors inside of Iran. I believe there is little hope that we will get a nuclear agreement with Iran. And on top of all that, this war has incentivized Iranian leaders to acquire nuclear weapons. And there is all sorts of talk now inside Iran in ways that there was not before February 28th about acquiring nuclear weapons, there's still resistance for sure, but you hear lots of voices, especially among the hardliners in Iran that it is time for Iran to get nuclear weapons. So what I'm saying to you is, I think once you get a frozen conflict, you are likely to have hostile relations between the United States and Iran moving forward. Even if they're not shooting each other, you're likely to have hostile relations. And furthermore, the nuclear issue is going to be front and centre because from an Israeli point of view and even from an American point of view the idea of Iran acquiring nuclear weapons is unacceptable. But this war has given the Iranians powerful incentives to acquire nuclear weapons. So this is a very

My final point has to do with great power politics. You want to remember that the United States is deeply involved in this conflict, but both the Russians and the Chinese are supporting the Iranians. You want to remember that the United States is a mortal enemy of both Russia and China at this point in time, or to put it in slightly different terms, China and Russia are rivals of the United States, and China and Russia both fear the United States. And therefore, China and Russia have a vested interest in helping Iran to defeat the United States. This is another reason that the Iranians are going to win this war and the United States is not going to win, because China and Russia are helping the Iranians. But you want to also remember what this means is that there's a danger of conflict between Russia and China on one side and the United States on the other side over the Iranian war. And I don't think this is likely at this point in time, but once you get a frozen conflict and the Russians and the Chinese remain committed to Iran's security, the potential for danger will always be there. That's the Iran war.

Let me switch gears now and talk about the war between the Houthis and the Saudis. As I said before, it's important to understand that they fought a war between 2015 and 2022. And the Houthis fought the Saudis to a standstill. What happened this year is that the Houthis sent a delegation to the funeral of Ayatollah Khamenei in Iran in July. And when that delegation came back to Yemen, this is the Houthi delegation, and it came back from Iran to Yemen, the Saudis were outraged because the Saudis had a blockade on Yemen. And as far as the Saudis were concerned, it was not acceptable for an aircraft coming from Iran carrying Yemeni dignitaries to land in Yemen. So what the Saudis did on July 13th is they bombed the Houthi airport in Yemen. And before they did that on July 13th, on July 10th, the Saudis asked President Trump, as I said before, whether this would be okay. The Saudis wanted President Trump's permission. And Trump gave them his permission and told them that he thought that it would be a good idea. President Trump encouraged the Saudis to launch an attack, which they did on July 13th, against the Houthis. And what that meant was that the war between the Saudis and the Houthis restarted. And it's important to understand that it was the Saudis, not the Houthis, who started the war. And the Saudi started that war with American encouragement, as I said.

Now, what happened was that in September, early September, around September 8th, September 9th, the Houthis upped the ante and they went on the offensive and they began to control or to conquer territory and to take full control of the strait at Bab al-Mandab. And this, of course, enraged the Saudis and on October 5th, the Saudis decided that they would up the ante. So you see what happens here is the war starts on July 13th, initiated by the Saudis, then on September 8th, September 9th, the Houthis upped the ante. And then October 5th, the Saudis upped the ante and we now have a major war taking place between the Houthis and the Saudis. That's where we are. Now, let me go down the list of factors that I would point to that highlight what a disaster this is, starting with escalation. First of all, you already have horizontal escalation, as I said earlier. Both the Pakistanis and the Turks who are allied with the Saudis have come into the war on the side of Saudi Arabia. Furthermore, over the weekend, the Egyptians came into the war on the side of the Saudis. And the Americans have been backing the Saudis in an indirect way since the war started, which is hardly surprising since the United States encouraged the Saudis to start the war. Now, what exactly Pakistani and Turkish involvement will mean and what Egyptian involvement will mean is hard to say, but there's no question that you've had significant horizontal escalation here in the sense that you now have three different countries that have come in on the side of the Saudis. And of course, the Americans on top of all that have been backing the Saudis all along the way. So you've horizontal escalations.

Now, there's a very serious danger of vertical escalation in this conflict. What exactly am I talking about? The Houthis have, by and large, stayed away from serious attacks on oil and gas infrastructure inside of Saudi Arabia. The Houthis have been attacking all sorts of airports across Saudi Arabia, there's no question about that. They've attacked Aramco oil headquarters, Saudi Aramco oil headquarters as well, and they've targeted lots of other economic infrastructure. But the [Houthis] Saudis have not targeted much of the oil and gas infrastructure inside of Saudi Arabia. And if they were to do that, right, and this brings me to my second point, the economic consequences would be enormous. The economic consequences of the Houthi war against the Saudis is already being felt. There's no question about that. And you want to remember that Saudi Arabia is a huge source of Middle East oil or Persian Gulf oil. Saudi Arabia really matters here. And if the Houthis escalate and they go after oil and gas infrastructure, if they shut down the pipeline in Saudi Arabia that runs from East to West, and they shut down the Saudi port at Yanbu on the Red Sea, and then go after other targets associated with the oil and gas infrastructure, this would have devastating effects on the international economy. Because you want to understand what's happening here in the Middle East is if you have two wars taking place, two separate wars taking place. One, the Iran War and two, the war between the Saudis and the Houthis, which are both deeply affecting the flow of oil out of the Gulf. And this is having negative consequences on the international economy. And what I'm saying to you is that if you get serious escalation on the part of the Houthis were there attacking oil and gas infrastructure inside of Saudi Arabia, and that greatly reduces the amount of Saudi oil and gas coming out of the Persian Gulf and the Red Sea, coupled with what the Iranians are doing – and remember, I said to you, the Iranians are now escalating their attacks on cargo ships and oil tankers coming out of the Gulf – this

would have devastating consequences. So escalation and economic damage are closely related in the case of the Houthis and the Saudis.

Third point I would make about this conflict has to do with the whole question of whether or not the United States has a war-winning strategy. And here we're talking about whether or not the Saudis who are close allies have a war-winning strategy? The answer is clearly no. The Saudis are in deep trouble by almost all accounts. If you look at who is winning this war, it is not the Saudis, it is the Houthis. One scratches his or her head in wonderment as to why the Saudis initiated this war on July 13th and then why they ramped up their attacks on October 5th; it just makes no sense at all. The Houthis are in the driver's seat. And as I said a minute ago, the great danger here is that the Houthis will further escalate, which will have devastating economic consequences. So there's no way the Saudis can win this war, which is another way of saying there's no way Donald Trump can win the war. The Houthis are gonna win the war. And we come to the next issue. What is the frozen conflict gonna look like once it comes about? And again, I will emphasise with regard to all these conflicts, they will all end. They're not gonna go on forever. You are eventually gonna get a frozen conflict. You're not going to get a meaningful peace agreement between the Houthis and the Saudis, any more than you're gonna get a meaningful peace agreement between the United States and Iran, and as I'll talk about in a minute, any more than you're gonna get a meaningful peace agreement between the Ukrainians and the Russians. That's not gonna happen. You're gonna get a frozen conflict.

So then the question you have to ask yourself is what does that frozen conflict look like? First of all, the Saudis and the Houthis will remain mortal enemies and there will be the ever present danger once the conflict stops that it will start up again. But then there's the whole question of the Saudis. Just think about Saudi Arabia's situation today. We talked about the Iran war, right? And Saudi Arabia has been obviously arrayed against Iran, and Iran is going to win that war, right, not gonna be a victory for Saudi Arabia. And with regard to the Houthis, the Houthis are gonna win their war against Saudi Arabia, So if you're Saudi Arabia, what's the situation you're gonna be staring at once this frozen conflict comes about? First of all, you're going to have Iran as a mortal enemy. You're gonna have the Houthis as a mortal enemy, and you're no longer going to be able to rely on the United States in any meaningful way to protect you. You want to remember that the United States could not protect Saudi Arabia when Iran was attacking it. The United States has not come to Saudi Arabia's rescue in its war with the Houthis. I've not talked about this, but the fact is that on three separate occasions, twice on September 10th and once on September 17th, MBS, who of course is the key leader in Saudi Arabia, asked President Trump to help him in his fight against the Houthis, and Trump refused on all three occasions. And of course, Trump could not do much to protect Saudi Arabia during the war with Iran. So the Saudis are really pretty much on their own moving forward. They don't have any other country that they can rely on to provide security for them. And they are faced with hostile neighbours.

Again, the Houthis are going to remain hostile, and in all likelihood, the Saudis will find that Iran is a hostile neighbour. So the Saudis face a significant threat environment and it can't

depend on the Americans to protect them. This then raises the question of whether or not the Saudis will think about getting nuclear weapons. I think there is a serious possibility the Saudis will go down the nuclear road. How far they get is another matter because you can rest assured that the United States and the Israelis will go to great lengths to make sure that Saudi Arabia does not acquire nuclear weapons. But the Saudis will be incentivized to get nuclear weapons, because that will be, in their opinion, I think, the best way to protect themselves. And by the way, to go back to Iran, as I said before, the Iranians have been incentivized to acquire nuclear weapons and there's all sorts of talk in Iran these days about Iran acquiring a nuclear deterrent. Well, the Saudis, made it clear long before February 28th, long before the war started with the Houthis on July 13th, that if Iran went down the nuclear road and Iran acquired nuclear weapons, that Saudi Arabia would do the same. So what you see here is that as a result of the Iran war and as a result of the war between the Saudis and the Houthis, you're going to get a frozen conflict in both cases and in both of those frozen conflicts, there will be incentives for the first conflict, for the Iranians to get nuclear weapons, and then the second conflict that I've discussed for the Saudis to get the nuclear weapons.

Okay, let's talk about Ukraine. Where are we in Ukraine? The conflict started on February 22nd, 2014. This is when the Russians took Crimea. This was when you had a coup in Ukraine and a government that was basically pro-Russian and was running Ukraine was overthrown and a new government came into place that was more pro-Western. Then in 2022, February 24th, 2022, this is eight years later after the conflict starts, a major war breaks out. And of course, that is the major war that is now taking place. The war has two important dimensions. One is a ground war. The Russians have conquered about one fifth of the territory of Eastern, well, one fifth of Ukrainian territory, and this is a huge slice of territory in the easternmost part of Ukraine and the Russians are bent on conquering more territory. How much more remains to be seen. But nevertheless, there's a huge ground war that's taking place in eastern Ukraine that involves a Russian attempt to conquer more and more Ukrainian territory. And then of course, there's an air war taking place as well, where the Russians are using cruise missiles, ballistic missiles, drones, and FAB bombs. These are smart bombs launched from aircraft to pound Ukraine. And the Ukrainians are using mainly drones to attack a whole series of targets inside of Russia. So what you see taking place is both a ground war and an air war. And this ground war and this air war have been going on since the war started back in 2022. One other very important dimension of this war that you want to keep in mind is that the Europeans and the Americans and basically the Europeans and the Americans can be put under the NATO umbrella, NATO and Ukraine have been waging war against Russia. It's not just Russia versus Ukraine. You also have to factor in the Europeans and the Americans, or more generally, NATO.

Now, let's talk about the danger of escalation, the consequences for the international economy, the prospects of an American victory, and what a frozen conflict looks like. Same basic template that I used for the other two wars. With regard to escalation, escalation is already taking place. And this mainly involves the air war, not the ground war. The ground war, I think it could be said, grinds on slowly. The Russians make steady but slow advances. And that's been pretty much the case since I would argue 2023. But in the air war you see

significant escalation. It really started this summer when the Ukrainians decided to launch a 40-day pressure campaign using drone attacks against Russia, against Mother Russia, to cause significant damage inside Russia and force the Russians to come to the negotiating table and cut a good deal with the Ukrainians. This 40-day campaign starts on June 26th, and it ends on August 4th. Now, in response, the Russians, who had been bombing Ukraine for a long time, but had not been waging a really intense bombing campaign against Ukraine, up to that point, decide that they are going to ramp up their bombing campaign. They are going to escalate their bombing campaigns in a significant way. And this is done largely in response to the 40-day pressure campaign that Ukraine had been waging against Russia. But once the Russians start to ramp up their bombing campaign, they begin to think that this is a war-winning weapon. They're having trouble winning a quick and decisive – well, I don't want to use the word decisive – they are having difficulty quickly rolling up Ukraine's ground forces in the eastern part of Ukraine. They nevertheless conclude that maybe the best solution here is to really ramp up the bombing campaign, destroy all sorts of economic and military infrastructure in Ukraine, bring the Ukrainian economy to its knees and make it almost impossible for Ukraine to support the frontline forces in any meaningful way. So what we see happening already in Ukraine, in other words, what's taking place right now is significant escalation. And by the way, the Ukrainians are retaliating. The Ukrainians were doing everything they can to increase their bombing campaign against Russia, at the same time the Russians are doing all they can to increase their bombing campaign against Ukraine. So there's real escalation taking place already.

Now, the great danger is that this escalation will bring NATO into the fight. There is no question that NATO is helping Ukraine to wage this war in very important ways; providing intelligence, providing Starlink capabilities to the Ukrainians, and so forth and so on, helping the Ukrainians to plan military operations. So NATO has been deeply involved in the conflict. It's fair to say that this is a case of NATO plus Ukraine against Russia. Nevertheless, NATO forces, and this includes, of course, the Europeans and the United States, NATO forces have not been directly involved in the fighting, and they've gone to great lengths to make sure they don't get directly involved into the fighting. But there is the danger of escalation here. First of all, there is pressure on the Russian side to attack NATO targets in Eastern Europe. This is the famous Sergey Karaganov argument, Karaganov's argument, which enjoys widespread support inside of Russia. This is not to say that Putin is in favour of the strategy that Karaganov has laid out, but nevertheless, I do want to make it clear that there are people in Russia who think that Karaganov's solution to the problems that Russia faces in this war are sound ones.

Now what exactly is Karaganov's view? Karaganov's view is that the Russians face an implacable foe in NATO, and NATO is gonna continue to do everything it can to wreck Russia. And the only solution for dealing with this problem from Russia's point of view is to attack targets in Eastern Europe, if not in Central Europe, maybe even Germany. And if Russia were to launch a few conventional weapons at NATO targets or targets in Europe, Karaganov argues that might very well cause the Europeans and the Americans to back off, to say that this situation is getting very dangerous. In other words, what Karaganov is talking

about is actually escalating the war for purposes of ending the war. In other words Karaganov is saying that it's very difficult to win this war on the ground and it's very difficult to win the war waging an air campaign simply inside of Ukraine. So what we should do is escalate by attacking targets in Europe with conventional weapons.

And Karaganov's argument is if that doesn't work, then we should use a handful of nuclear weapons. And if Russia were to use a handful of nuclear weapons against the Europeans and the Americans, you wouldn't hit targets in the United States, but you'd hit American allies. You'd be attacking NATO targets. If the Russians were to do that with nuclear weapons, the United States would not allow nuclear retaliation because that would potentially lead to general thermonuclear war. And what the United States and the Europeans would do in Karaganov's story is axiomatically back off. Because they would then understand, the Europeans would then understand, and the Americans would then understand just how dangerous the situation is. And of course, this is why Karaganov is talking about attacking targets in Europe, first with conventional weapons, again, and then nuclear weapons if the conventional weapons don't do the trick. You're signalling to the other side that this situation has to end. And hopefully, this strategy of coercion will work.

Now, I'm not saying the Russians are going to pursue Karaganov's strategy, but the key point that you want to keep in mind is that the potential for escalation here is significant. If the Russians don't win the war against Ukraine in ways that they think is favourable to them, the temptation for them to escalate will be very great. Now, let's talk about the Europeans and the Americans, but especially the Europeans. There is no question that the Europeans and the Americans, NATO more generally, is deeply committed to winning this war. We are deeply invested in this war, and if the Russians were to win the war, and I do believe the Russians will win the war, I do not believe the Russian will have to implement the Karaganov doctrine or Karaganov strategy – let's hope that I'm right on that count – but I don't think that will be necessary because I think the Russians will win the war, but if that's true, what are the consequences for NATO, i.e. the Europeans and the Americans? And what are they likely to do? Well, the consequences will be disastrous. This will be a devastating defeat for NATO if Russia wins this war, as I predict that it will. And the question you have to ask yourself is what will the Europeans and the Americans do? Will they just sit down and accept that fact of life? I think that's the likely outcome, but I think it's very possible that the Europeans and the Americans will escalate in one way or another. We will do certain things to try to rescue the situation, to ameliorate the damage. So what you see here with the Ukraine war is that you have real potential for escalation. And as I made clear, at the start of my comments on Ukraine, escalation is already taking place. It's very important to understand, if you look at what's happening in the air war, what's been happening in the air wars since June of this year, from June 26th up till now, you see lots of escalation. And what I'm telling you is that in addition to that escalation, there is real danger of further escalation down the road. And this is where the Karaganov strategy comes in and the possibility of NATO using military force to try to ameliorate a defeat.

Then there's the international economy, the second element of my framework. Look at what President Trump is trying to do now with regard to getting Russian diesel and Russian oil out into global markets. Trump fully understands that it's not just Iran and the war in the Gulf or the Houthis and the war in the Red Sea that are threatening the international economy, Trump also understands that what's happening with regard to Russian oil and Russian gas does matter. It does not matter as much as what's happening in the Middle East, there's no question about that, but Trump understands that he needs to get all the oil and gas he possibly can out into global markets. And what he wants to do is get the Russians to help him in that regard. And this is one of the principal reasons that Trump is playing hardball with the Ukrainians these days, and he's playing nice with the Russians. But all of this is just to say that there is a danger here that if this war continues, and especially if the Ukrainians begin to continue to tear apart energy or oil infrastructure and gas infrastructure and diesel infrastructure inside of Russia that this will contribute to the problems facing the international economy. So with regard to Ukraine, I'm telling you, number one, serious potential for trouble on the escalation front, serious trouble in terms of the international economy.

We come to the third element of my framework. Is there a meaningful solution for the United States to end this conflict and come away as a winner? And the answer is no. The United States is gonna lose this war. The United States is gonna lose this war just like it's gonna lose its war against Iran and just like the Saudis are gonna lose their war against the Houthis. The United States has no war winning strategy in Ukraine. The Russians are going to win an ugly victory. They already control basically one-fifth of Ukrainian territory. They've annexed, I should say, one fifth of Ukrainian territory, and they may take even more territory. And furthermore, they're wrecking Ukraine as a functioning society. They're going to turn Ukraine into a dysfunctional rump state. This is gonna be a devastating defeat for NATO. It's a defeat for the United States. We come to the fourth element of my story, frozen conflict. You're gonna get a frozen conflict, I've emphasised for a long time now that the Russians are not gonna win a decisive victory. That's not gonna happen. They're not gonna decisively defeat Ukraine and occupy all of Ukraine. The Russians are going to conquer a huge swath of territory in Ukraine, but there's going to be a dysfunctional rump state that remains.

The question you have to ask yourself is, what's the frozen conflict gonna look like? First of all, there are gonna be poisonous relations between the Russians on one side, the Ukrainians in that dysfunctional rump state on the other side, and there are going to be poisonous relations between the Russian on one side and the Europeans and probably the Americans on the other side. There are going to be poisonous relations in Europe between Russians on one side, Ukrainians and Europeans on the other side, for as far as the eye can see. This is a disastrous situation. You're not going to get a meaningful peace agreement. To go back to the previous two conflicts that I talked about, Iran, I do not think you're going to get a meaningful peace agreement, you're gonna get a frozen conflict with significant potential for escalation. And in the case of Iran, significant potential of nuclear proliferation. You're not going to get a meaningful peace agreement between the Houthis and the Saudis. You're going to have a frozen conflict. And even there, the potential for nuclear proliferation when you think about Saudi Arabia's situation is significant. But here we're talking about Ukraine.

You're gonna have poisonous relations, for as far as the eye can see, between the Russians on one side and Ukraine, the Europeans and the Americans on the other side. Then you want to remember that there are a number of potential conflict situations that are closely related to the Ukraine war that could flare up and could turn into real wars. There's potential for real trouble in the Arctic, in the Baltic Sea, in Belarus, in Moldova, in the Black Sea, in Kaliningrad. There's talk all the time these days about a potential conflict in Kaliningrad. Once you get a frozen conflict, the potential for trouble in those six areas is going to remain. So the situation moving forward looks very, very dangerous in all three of these conflicts once you get them frozen.

Now let me say a word about great power politics. I don't think there's a serious threat of the three great powers all getting involved in the war between the Houthis and the Saudis. That's the one piece of good news that I have. I think the United States is obviously involved in significant ways in what's happening between the Saudis and the Houthis, but there's no evidence that the Russians and the Chinese are involved or are about to get involved. So I don't see great power politics coming into play in that conflict. But with regard to the other two conflicts, there's real potential for trouble. That's obviously true with Ukraine. I mean as I said before, you have the Russians on one side, and you have Ukraine plus NATO on the other side. The United States is deeply involved in the war in Ukraine. The United States is fighting against Russia; it is not directly involved in the combat, but it is deeply involved in terms of helping Ukraine wage that war. Without American support, without support from NATO, the Ukraine-Russia war would have ended two or three years ago, right? It is very important to understand that. And by the way, President Trump has recently threatened to cut off intelligence to Ukraine, the American intelligence to Ukraine and threatened to cut off access to Starlink. The Ukrainians have screamed bloody murder about that and made it very clear that if that were to happen, they would lose the war quickly. And that's true, they would lose war quickly, but what that tells you is just how important American support is for Ukraine's waging this conflict. Ukraine plus the United States, Ukraine plus the United States plus Europe are waging war against Russia.

So you see you have two great powers, the Russians and the Americans, who are effectively at war with each other at this point in time, even though the Americans are not pulling triggers on the battlefield or up in the skies. On top of all that, the Chinese are firmly behind the Russians. So it's the Chinese and the Russians, the Chinese are backing the Russians in Ukraine and the United States is involved with the Ukrainians against the Russians so you see where the potential for escalation involving the great powers in the Ukraine war is significant. The other conflict where you have to worry about the great power is the Iran war. Because as I said before, it's very important to understand that the Russians and the Chinese have a vested interest in seeing Iran defeat the United States. So China and Russia are helping Iran against the United States. And of course, in that war, the United States is directly involved in the fighting. It's pulling triggers and pushing buttons. There's no question about that. So the United States is in the war already against Iran, and on Iran's side are the Chinese and the Russians. There is no question the Chinese and the Russians have been supplying intelligence and have been supplying equipment of one sort or another that has helped Iran in

its fight against the United States. To go to a more general level, what you see happening, you see this not simply as a result of the Iran war, but in good part as a result of the Iranian war, you see that the United States, because of its various wars and its policies around the world, has pushed the Chinese, the Russians, the Iranians and the North Koreans close together. They're all working together to deal with a hostile America. You want to remember, and I haven't said anything about this, but the North Koreans have been fighting in Ukraine on the Russian side. Just think about that. The North Koreans and the Russians have developed very friendly relations since the Ukraine war started. And again, the Russians are getting lots of assistance from North Korea, they're getting ballistic missiles, they're getting North Korean troops, right? So you see the North Koreans, the Iranians, the Chinese and the Russians have all come together.

And the potential for escalation over time, not today, but over time involving the Chinese and the Russians on one side and the United States on the other side in the context of the Iran situation should not be underestimated. So what is my basic story here? Let me sum up. My basic story is that President Trump, since January 20th of this year, since the start of the second year of his second term in the White House, has got himself, and of course the US deeply involved in three wars, the three wars that he is responsible for, that are all disasters. I've tried to make that clear by looking at the potential for escalation in each of those three wars, the effects on the international economy in each those three wars, the possibility of the United States winning in any meaningful way in any of those three wars, and I've gone to great lengths to show that we're going to lose all those three wars. And furthermore, I've argued that what we've gotten are frozen conflicts, or what we're gonna get in all three of those wars is eventually a frozen conflict and those frozen conflicts are going to be fraught with opportunities for more war and more trouble. And I tried to drive the point home very clearly that once you get a frozen conflict involving Iran and once you are frozen in conflict involving the Saudis and the Houthis, the potential for nuclear proliferation in both those cases will be very significant.

So if you think about these three wars that President Trump is responsible for, what's happened here is that he has created a situation that is disastrous. I might add on this point that one could argue, it's hard to say exactly how all these wars will play out, we know what the general picture looks like, but exactly what happens is hard to see, but one could argue that President Trump, when all is said and done will have ended up destroying his presidency as a result of these three wars. You wanna remember he has well over two years left in the White House, two years and three months and there's no evidence that these wars are gonna end anytime soon. Now they may end soon, one of them might, two of them, might, who knows? Maybe none of them will end soon. But even if they end, you're going to get frozen conflicts. And President Trump is going to have his hands full dealing with these conflicts or the fallout from these conflicts once you get a frozen conflict. And one could argue that he will end up in a situation analogous to the one that LBJ ended up in as a result of the Vietnam War. And by the way, I would argue, if you look at what happened to Richard Nixon and you look at his downfall. I think the consequences of continuing the Vietnam War cannot be underestimated for what ultimately happened to President Nixon and here I'm talking about

his resignation in August of 1974. When you get into a losing war, the consequences are usually quite significant. And in this case, President Trump has gotten himself into three losing wars. These are three wars that he's responsible for. And I believe that they are going to have disastrous strategic consequences for the United States and I'm saying here, they may have disastrous consequences for his presidency as well.

One final point that I want to make before I stop, and that has to do with the conflict in Gaza. One might say why didn't I talk about the Gaza war? The reason is I think that it is not a war. The idea that the IDF, the Israeli Defence Forces, were fighting against another army and that this was a war like these other conflicts that we're talking about is, in my estimation, a wrong-headed argument. What happened in Gaza is a genocide. It's not a real war. And I didn't talk about Gaza because I'm interested today in talking about Trump's wars, not the genocide in Gaza. That's for another day. But the key point that I would make to you is that the Gaza genocide, which of course Trump inherited from Biden, you want to remember that Trump not only inherited the Ukraine war from Biden, but Trump inherited the genocide as well, the Biden administration, to be clear, was complicit in the genocide in Gaza, the Trump administration then inherited that genocide, and I believe the Trump administration is now complicit, in that genocide, but it is not a war. And the argument I would make is that the genocide is not a strategic disaster for the United States. What it represents is a moral disaster. This is a mortal stain on our reputation that will never go away. The fact that we are complicit in this genocide will haunt the United States for a long time to come. But again, it's not a strategic disaster, the way the three wars that I talked about are. Let me stop here and call it quits. I hope that people found the discussion today useful and I look forward to our next get together. In the meantime, be well.

END

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