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[00:00:00] **Robert Pape:** This is a very conflict-prone world, so a lot of different actors, a lot of power vacuums are going to emerge. And in power vacuums, you get a lot of escalation. It's not just the 20 million barrels coming out of Hormuz. Now we have another 5% of the world's oil, and this is causing a shock, okay? This is exactly what to expect with Iran's strategy, the consequences, and I'm sorry to say it could well get worse before it gets better

[00:00:33] **Nate Hagens:** Today I'm joined by geopolitical analyst Robert Pape for a deep dive on the unfolding phase shift we are now witnessing in terms of military tactics, strategy, and regional control in the Middle East, as well as the decline of the United States as a global superpower, in coming decades and beyond.

[00:00:55] Robert A. Pape is professor of political science at the University of Chicago, specializing in international security affairs. His publications include Bombing to Win: Air Power and Coercion in War and Why Economic Sanctions Do Not Work. Additionally, Robert is the director of the Chicago Project on Security and Threats.

[00:01:20] His current work focuses on how force is used to achieve political objectives, how escalation unfolds, and how strategies of restraint can succeed or fail in international and American political violence. In this spitfire conversation, Robert gives us an update on the Iran war as a result of the recent Ansar Allah attack on the EastWest pipeline in Saudi Arabia.

[00:01:48] He explains why this is another signal that the conflict is more likely to keep escalating and worsen rather than resolve itself anytime soon. Taking a step further, Robert connects the dots that point toward a larger decline for America's militaristic, diplomatic, and financial power in the world, and what that might mean for the era of globalization and stability that many of us have taken for granted over the last many decades.

[00:02:20] This was a fast-moving conversation that personally, since I have connected many of these dots, left me with a pit in my stomach about the current state of the world and the near term future and the work that my team at TGS and ISOF are trying to do. That said, Robert's analysis was also illuminating in terms of what we might expect as this war continues on.

[00:02:46] With that, please welcome Professor Robert Pape, welcome to the podcast

[00:02:54] **Robert Pape:** thanks, Nate. Thanks for having me

[00:02:56] **Nate Hagens:** This is our first conversation. I've been following your work, this summer, and you are quite prolific in your research and take on what's happening in the Middle East.

[00:03:09] Let me, before we get into questions, timestamp this conversation. It is Tuesday, September 15th, 2:30 in the afternoon. Yep And let me start with this. A few days ago, Ansar Allah attacked the East-West pipeline in Saudi Arabia. So now, broadly speaking, in the area, not just Hormuz, but the whole Middle Eastern region, what was 25 million barrels a day of exports to the world are down to around 13 and a half million.

[00:03:39] So the world is down from 100 million to 88-ish And the difference is coming out of storage. What are your initial takes on how this new Ansar Allah Yemen a-altercation, changes the trajectory of the conflict in the region?

[00:03:57] **Robert Pape:** Well, this was fully predictable. So I've been talking about this on the Escalation Trap Substack for months.

[00:04:05] in the middle of June, my-- there's a June 15th post I like to direct people to, which is Iran and the era of maximum leverage. So I explain that this was before the MoU was signed. I explained that Iran is about to come into a period of maximum leverage. Its maximum leverage would start in the middle of July, and it would grow.

[00:04:27] And then it would grow, and likely you would see the opening of a second front. That would be the Red Sea front. That would be an expansion also of its objectives. So even beyond what was being discussed then, with the MoU, that was being passed around at the time, that they would escalate their demands even beyond the MoU, and that demand would be to evict American forces out of the region, in a very complete way.

[00:04:54] And that is what you are witnessing unfold. I also explained that Iran would take the initiative, that we had been thinking of this war as an American or Israeli initiative, which I think is quite, quite true, absolutely true until the summer, until this period of maximum leverage. And then in the period that I was explaining was coming, and is now here, this would unfold and Iran would become more and more, the initiator of a violence, not simply responding to violence.

[00:05:31] would become more and more, seeking to expand its orbit of influence, not simply hold on for survival. And this is exactly what you are seeing. And in fact, what happened with the Houthis in this roughly seventy-two-hour period, and it's really important to understand, was a spurt by the Houthis.

[00:05:55] this was a spurt after what you could think of as a ramp-up by the Houthis starting around July twentieth. So, I'm glad to, if it's okay, to go on and explain in more detail the exact dates and trajectory of how this changed. But this explains the fact that Iran was gonna come into this period of maximum leverage, why the MoU was gonna be very fragile, break almost right away, which is what I said was gonna happen, and it happened.

[00:06:28] and it's because we're, so used to thinking, Nate, when this war began, that if President Trump and Netanyahu would simply stop, then the war would stop Well, the problem is once you start these major wars, there's another side here, and this isn't the first time that this side's been attacked and its leaders have been killed in the last 15 months.

[00:06:54] I don't mean in its 50-year history. So you add all this up and you also have a situation where we had these cushions with the oil. So there was a contraction of oil coming out of Hormuz, as everybody famously knows, but there were cushions. We had the strategic petroleum reserve as a cushion from our country, thirty-one other countries.

[00:07:20] We had China as a cushion taking five million barrels a day off demand. I mean, that's really something. That was the summit-- that's what happened at the summit with Trump. We still don't know the quid pro quo. And then the third was the Red Sea. These were bypasses from Hormuz. They were pipelines, especially this east-west pipeline, that was there before, but the Saudis didn't really use it 'cause they were putting most of the oil out through the Red Sea.

[00:07:47] However, very quickly when the wa-- after the war began, the Saudis were able to use that pipeline, and that, was mostly what was sending oil to Yanbu, which was an, which is a port town on the Red Sea, and then that was how five million barrels a day were coming out. Well, those were all going to shrink, become vulnerable and change.

[00:08:14] These are not permanent, and this is based on twenty years of modeling the bombing of Iran and where we are.

[00:08:21] **Nate Hagens:** Well, as a fellow Midwesterner, my initial response to your opening statement is, "Holy crap."

[00:08:31] **Robert Pape:** The technical term.

[00:08:34] **Nate Hagens:** So I do wanna get to your core expertise. Yeah ... you have a career studying air power coercion and the logic of political violence.

[00:08:43] but let me double-click on something that came up, because of what you just said. I am hearing, of course no one really knows, that it's six weeks at least until this pipeline can be repaired. Yeah ... and because there were subsurface damage, and there's complexity and such-

[00:09:04] **Robert Pape:** And it was a pretty major set of attacks.

[00:09:06] There were eight different points hit. I mean, this is not just one bomb or one hand grenade going off.

[00:09:12] **Nate Hagens:** It raises an interesting question. Is it possible, and again, maybe I'm jumping ahead of your expertise in our conversation about drones and how that changes the international military calculus, but maybe Saudi Arabia will choose not to repair it, or maybe they'll repair it and not open it until there's some sort of deal.

[00:09:33] Deal with who is another open question. Because then the drones could just take it down again. What are your thoughts there?

[00:09:40] **Robert Pape:** Yeah, absolutely. Yeah, this is exactly... So, just to-- for some of the people listening, they'll know more about history and World War II. So I have studied air power, as you've just said.

[00:09:51] Well, this is very much like transportation bombing in World War II, where, the British, mostly the British, but also with some help from the Americans against Germany, we tried to bomb the rail lines. And so what you found was that the rail lines, you have to, you had to keep bombing them because there would be railroad tracks, you'd blow them up, and then the Germans would have people who would go and fix it.

[00:10:14] Now- It would take a few weeks, so this wasn't something you turned right back on. But we did this over and over again. and here the pipelines are just far more fragile than railroads. and so you have, with the railroad bombing, you needed just a, a whole ton of bombs . So literal- I mean, I'm not using the exact term, but the-- to use the Midwest jargon here.

[00:10:40] but here, just eight attacks, that are hitting the aim points, that's really a tremendous amount of damage. It can be repaired. th-this doesn't take special expertise to repair. I don't think they're gonna need even specialized equipment, meaning refashioning some of the pipeline parts. I don't think that's at issue, or else this would be a year out.

[00:11:03] I think that it's more likely gonna be, as you said, that if they repair them, they are hyper-vulnerable to being hit again. They can be hit again by the Iran backed militia group in Iraq who did this attack. They can be hit by the Houthis. The Houthis have all-- they know-- everybody knows where this pipeline is.

[00:11:22] and they can also be hit by Iran itself. So if Iran can reach Israel, Iran can hit this pipeline. And we haven't even talked about ground saboteurs, for example.

So there's multiple ways to shut down this, and it can also be the ca-case. There is a giant refinery near Yanbu called Abqaiq that your listeners can go and find.

[00:11:45] And even if you decide to not hit the pipeline, man, you can go right and smash that refinery, and now you've knocked out that oil, even if the pipeline's open for several years. So, so there's-- this has always been a hyper-vulnerability, Nate, and I'm saying that what this is, you are watching a cohesive Iran strategy.

[00:12:10] It's been rolling out bit by bit since July. This, even though the world is now hyper-focused on this in the last few days, this has been going on for some time, and, and the fact is, it can get worse. So you explained it quite well, here, that it's not just the 20 million barrels coming out of Hormuz.

[00:12:33] Now we have another 5% of the world's oil, so that's one of the reasons things are spiking up, and this is causing a shock, okay? So this is exactly what to expect with the, the con- the Iran strategy, the consequences, and I'm sorry to say it, it could well get worse before it gets better.

[00:12:53] **Nate Hagens:** Well, even if the war ended today, which clearly it's not going to, there's a pig in the python coming with global crude and refined products.

[00:13:04] today, oil in Shanghai and China is $135 a barrel. Diesel's $6.50 in the US, and this is with ample product. I mean, the, the-- we're drawing down stocks yet. So I've spent the last 15 years looking at the importance of energy, specifically oil, to the global economy. Ah, yeah. And I think our culture is what I call energy blind, because we just assume that there will be more and affordable oil next year than this year, and that support is potentially being kicked out.

[00:13:42] And I don't wanna, put you on the spot here, but three days before this war started, I did a Frankly, which is one of my little weekly monologues, and I said, "If the US and Israel attack Iran, this will be a Waterloo moment for our president and possibly our country." Yeah. And, I'm really feeling that now, and I'm wondering what your thoughts are.

[00:14:04] **Robert Pape:** Yeah, absolutely. So Waterloo is a per-- That's a giant loss here for Napoleon. and the, Br- the, it's a Napoleonic war reference. But what you are describing here is the consequences of this war. So in the modeling of this war for 20 years, what this modeling always showed was an escalation trap, and that's why I called this the escalation trap.

[00:14:30] May-maybe you could just define that. So what an escalation trap is when the attacker, bombs targets, and the bombs do hit the aim points, they do kill the leaders, but there's a stage two where the other side doesn't collapse and gains power That is what happened exactly in this war. There have been other escalation traps in history, so it's not the first time.

[00:15:01] I've been studying escalation for 30 years. But it was going to be the-- probably the worst, and now it is the worst. And the reason is because when we bombed those leadership targets, we were very unprepared. We didn't even have the backup forces to deal with this, for the bombs to kill the leader, but Iran to lash back and take Hormuz.

[00:15:29] Now, they didn't lash back with an army, with a giant army, and go and land in Riyadh with a giant, 50,000 troops. What they did is they relied on the Second Precision Revolution, cheap mass drones, and used those mass drones in combination with mines to selectively control the Strait of Hormuz, which means not allowing, the passage of virtually any ship unless it was their own ship Or a ship that cut a deal with Iran, which, hasn't been that many in the beginning, in part because we punish them.

[00:16:13] But that was what Iran did. So they had s- they have selectively controlled Hormuz, and that allows them inordinate power because what they're doing is they're not just physically controlling a waterway. They're exerting orchestrated control that if a deal is cut, then they can open the spigot and the ships can come out.

[00:16:44] Not cut and wham, it's down. That's control. That's not just a blunt, you know, stoppage of ships. That's political control, and that's what I think was missed very much by General Keane, the Trump White House here. It's not that they didn't know that Iran had certain capabilities. I think they were mis- misunderstanding the nature of an escalation trap, and that what Iran would want is power.

[00:17:19] Power, and I've been trying to stress this for many months, that this isn't about a religious group wanting to get a quick trip to heaven and a religious goal. They want power, and the Trump and Is- Israel-- the U.S.-Israeli attack gave them the perfect pretext to gain that power.

[00:17:41] **Nate Hagens:** So is there a difference between, power, control, and the ability to disrupt?

[00:17:50] **Robert Pape:** Well, they're linked on a pipeline, so they kind of-- The ability to disrupt generates, the ability to control, and I'm saying it's actually quite orchestrated. You can turn it off and turn it on. That's what generates power.

[00:18:03] **Nate Hagens:** Okay.

[00:18:03] **Robert Pape:** Those are the steps in the chain. And the power part is so important here, Nate, because-- And this is the third stage.

[00:18:14] So I-- in the escalation trap model, stage one, attacker, bombs, tactical success. Stage two, the other side gains power, so now it's a strategic failure for the attacker. But then it's stage three. Does the attacker just walk away, wash their hands of it, or do they come back for more escalation? And what I explained is that the nature of Iran taking Hormuz was going to make this a trap because this is the real problem here for the Trump administration, which is you might say, "Well, this didn't work, sir, and we misunderestimated.

[00:18:51] We should just walk away," and people have been saying that for months. Well, the problem here is that you're got a state now that has gained power over... This was at first just Hormuz, 20% of world energy, and that is ex- extraordinary power, Nate. When we left the Vietnam War and North Vietnam took the South, there was no way that Vietnam was gonna control 20% of the world's energy supply.

[00:19:20] Right. So you could just walk from the Vietnam War. It's embarrassing. Here, you walk, and this is what you're seeing. Iran expands. Iran will go for more, and this is exactly what they're doing and why there's an escalation trap, and we are continually having this discussion, should we bomb? Should we do this?

[00:19:44] And it's because we're in stage three, called the escalation trap, and it's just not gonna go away because Iran's not surrendering that power. It's not-- It's regional power, and it's world power.

[00:19:59] **Nate Hagens:** From a biophysical perspective, looking at, let's just say, half of the recoverable oil left in the world is within 500 miles of, Iran- Yeah

[00:20:12] give or take. From an escalation ta- trap lens they always had the power because this spice lay under the oceans and the waterways and the pipelines in that region. But this war actually indirectly turned on their power.

[00:20:31] **Robert Pape:** Yes, and I agree with your analysis right to a T, and it shows what an expert you really are.

[00:20:37] Because usually when I'm teaching about these subjects, and I've taught for the military, the Air Force, I'm usually having to explain that, so much-- over half of the world's oil reserves are within about a hundred and fifty-mile radius. So if you just get the map out and you get the oil field map out here, you'll go, "Oh my goodness gracious."

[00:20:58] it's not like it's a thousand miles wide. And, it's true that it's, it's not, it's not all that fifty percent, but it's so much of it. And so that's why there's been, since the 1970s, a concern by the United States to prevent an oil hegemon. This is not a new concern. This has been going on since during the Cold War.

[00:21:19] And it wouldn't matter if it was the Soviet Union taking all that oil or if it was Iraq taking that oil or if it was Iran or if it would've been Saudi Arabia taking that oil. So we-- This, that point is really important. Now, what happened here? Why did they wait so long? A couple of points here. Number one, in June 2025, there was a twelve-day war, and that twelve-day war ended, and Iran allowed it to end, and then they went back to negotiate.

[00:21:47] And right at the end of that, most people missed that there were indications that Iran was about to start closing Hormuz. But there's a second thing that is important to know, which is, in this case, both on June 25 and then on February, 26, Iran waited until we attacked. Now that's...

[00:22:11] you might say, "Well, why would they wait for America to attack them and then take power?" It's because they can then shift the blame to America and Israel, which is exactly what's happened, Nate. This is a big deal because who is to blame for the world economy going off a cliff? Now, we haven't fully gone off the cliff yet- No, we haven't gone off it yet

[00:22:39] but everybody now has woken up that we're on the Titanic hitting the iceberg. Okay. Yep. So, the days of ignoring that are disappearing. So, but what the, But now the world's going- well, the economy's going off the cliff. Somebody's gonna get blamed for this, Nate, and this is why so much of the world, you see this in all the opinion polls, who do they blame more than anybody else?

[00:23:03] America and Trump, and even more than Israel.

[00:23:07] **Nate Hagens:** So we're not only losing the war, we're not only losing the access to the spice, but we're losing the global goodwill and gravitas that we had with other nations.

[00:23:20] **Robert Pape:** And it's worse than that, Nate, because you see now that the war has gone on for half a year.

[00:23:27] So think about that, over half a year It's absolutely crystal clear not just that we started a stupid war and this was bad and the economy is bad, but that America as protector, which it has been since the end of the Cold War, and that happened in the first Gulf War against Saddam Hussein, who also was trying to become an oil hegemon when he invaded Kuwait, and that joined Iraq's oil, Kuwait's oil.

[00:23:55] He's right at the border of Saudi Arabian oil, only seventy-five miles from those oil fields with his forces. and we kicked them out in forty-three days and only lost a hundred and forty-seven troops. Now, we don't wanna lose anybody, but we took ten thousand body bags with us, here. So this was a stunning success.

[00:24:13] And so for thirty-five years, we have had what's called globalization, which is a lot of the world cutting their military budgets when trade then became a much bigger part of the world economy because it was cheaper, and you could be more confident in the stability. Now, this is reversing, Nate.

[00:24:35] **Nate Hagens:** I ask this question with some trepidation because I fear I know the answer, but can you walk us through the United States' strategy in Iran and the Strait of Hormuz up until this point?

[00:24:45] I mean, what was the administration trying to do, and how does that fit with your historical patterns that you've looked at?

[00:24:52] **Robert Pape:** Yeah, so most people define a strategy just by looking at the bombs hitting a target and thinking a bomb equals a strategy. That's tactics, and our tactics have been all over the place.

[00:25:02] So there's no doubt we're oscillating, our tactics are off. However, it's also not true that Trump doesn't have a strategy. So what President Trump's strategy is for how to compel others in the world, and I think this is true in other countries, it's true with the tariffs, I think it's also his strategy domestically, is punishment.

[00:25:26] Punishment is his strategy. Like, like spite almost. like spite, but he wants to do some near-term pain with the prospect of even more pain coming. This strategy called a punishment strategy is, in my book Bombing to Win, I lay out and analyze that compared to other coercive strategies. And this-- And Trump is com-- just wedded to this idea, and you see it all the time.

[00:25:57] So what I mean is when he's attacking the leaders, he is killing the leaders, and he's then getting on television saying, "And if you don't do what I want you to do, I'm gonna kill more leaders." And then when that doesn't work, he shifts over to a bombing campaign, which is imposing more costs on the leadership and Iran.

[00:26:23] And then also all the way through, "You don't do what I want, this will go on longer, and there'll be more costs on you." This is what a punishment strategy looks like. And then that didn't work, and then he comes into April, April 12th, where so far these earlier punishment strategies haven't worked, and what does he do?

[00:26:40] An economic blockade strategy. And what does economic blockade do? Punishment to the whole society. So now we're-- he keeps widening the punishment. You see what I mean? And this punishment, what it's really doing is congealing the opposition inside of Iran against America. The more we hurt those people, the more they want payback. We're not crushing them.

[00:27:08] We're not breaking their backs. What we're doing is fueling exactly what the, milit- the Revolutionary Guards called the IRGC. We're solving their problem. They had a problem when this war started, which is, the Iran government was not popular with the majority of the people. We're making the Iran government popular.

[00:27:32] Maybe not with the full majority, but a lot more than before.

[00:27:35] **Nate Hagens:** I'm nodding with you. I'm agreeing with you. I understand this. I'm also feeling a little bit of a pit in my stomach and sadness.

[00:27:45] **Robert Pape:** Yeah, me

[00:27:46] **Nate Hagens:** too. This is not gonna end in our lifetimes.

[00:27:48] **Robert Pape:** Yes, this could go on. So, my-

[00:27:50] **Nate Hagens:** Well, the war may, but the, the dynamic and the energy flows in the world and the US, role in the world, [00:27:58] **Robert Pape:** it's all changed now, no matter what And the anger that-- So the, thing that we're missing with these punishment strategies, and I listen to this all the time, and when I- I've advised every White House since two thousand and one, I would listen to it across the table in the West Wing, okay?

[00:28:15] I listened to it by senators, by congressmen. These are pretty smart people here. Many people are frustrated with President Trump, and that's why they often will say he doesn't have a strategy, and he's not thinking strategically. And what they're focusing on as the word strategy is the fact that he does bounce all over with tactics, and he's shifting from, you know, Hegseth kind of bo- strategy to a Besson strategy and so forth.

[00:28:42] and that-- We can talk that way, and that's not terrible, but it's not analytic. It's not what makes and defines a strategy, you see? What defines a strategy is when you take a tools, and they can be military tools, they can be economic tools, and you're, gonna try to trigger a mechanism to try to get an outcome, in this case, get the government of Iran to cut a deal, change its behavior, go back to the pre-war status quo ante.

[00:29:11] So it's, three steps. It's-- there's the action, military or economic, there's a mechanism, and then there's the outcome, which is to coerce your opponent. Get the opponent to change behavior. What really defines strategy as opposed to tactics is not whether you use military or economic tools, it's the mechanism of action, the middle.

[00:29:39] And in this case, what President Trump is doing, whether it's with military tools or with economic tools, is he is trying to trigger the mechanism of punishment, increasing costs on the opponent to change the behavior of the opponent. He thinks that if he punishes either the government, the people, or the military, they will cave.

[00:30:06] And he said over and over in the last six and a half months, he doesn't understand why they're not caving. Well, the reason they're not caving, Nate, and it doesn't matter which tool he's using, is because he keeps doing punishment, trying to drive up the cost. And when you drive up costs on somebody, you get in a fight or flight, but you don't get cooperation.

[00:30:32] So think about it being in the grade school, the yard... When I was a kid, okay, and I was in elementary school at St. Mary's, even though I'm not Catholic, they let me in, and we'd play on the playing ground. I was in fourth grade, and Alvin was in sixth grade. And Alvin, as you could imagine with a sixth grader, was the bully.

[00:30:54] He would pick on the fourth graders. And what you see is that he would punch them, take their lunch money, and then once he got to the lunch money, he just hit them again the next day. Well, I watched this and I realized I'm gonna get hit no matter what here. There's no point in giving him the money because I'll just get hit.

[00:31:15] So when he came after me, I just ran right at him. Okay? Now, I got a big black eye, but what happened was Alvin never did it again. And so he tried the punishment, you see. And the problem is when you give in to the bully who's punishing you, they're just gonna come right back and take more. And if after they take the lunch money, it's your dinner money, it's your candy, it's-- they're gonna take whatever they can.

[00:31:44] And the only way you're gonna get out of this is not to cooperate with them, okay? It's you're gonna, you're gonna have to stand up or run away. Y- that's the fight or flight. This is what happens when you punish societies.

[00:31:58] **Nate Hagens:** It's almost 5D reverse spite and punishment because writ large, at least in the intermediate and longer term, we're hurting ourselves deeply.

[00:32:11] **Robert Pape:** That's exactly right. Germany in World War II bombs, and this is in the fall of 1940, they bomb London. And Hitler is trying to... Exactly the same punishments, right? He's trying to get Churchill and the leaders in Britain to back off, because he wants to get the continent. Well, what happens is that the punishment of London and Coventry kills tens of thousands of people, okay?

[00:32:41] And it goes on for months. What that does is it fires up the British population. You might think, "Oh, these are these, you know, liberal Brits. They're used to, you know, their tea. They're gonna c- they're gonna cave." Hitler famously called them worms, okay? No, that's not what happened. What happened is they came...

[00:33:01] And you know, the public demanded, Nate, that Churchill get payback. And what did Churchill do? He fired his whole air staff because the air staff he had put in place before the bombing of London was gonna do economic bombing of Germany, and that wasn't good enough. The British public wanted to kill Germans.

[00:33:23] And what they, and what Britain, and what Churchill did is he put in Bomber Harris, and there are detailed plans all laid out in my book, in Bombing to Win, to, for the British to firebomb 58 German towns one after another and kill, their goal, 900,000 Germans. Civilians, not military. And where did that all come from, Nate?

[00:33:48] That came from Germany bombing London. And that's why I go to great lengths when I teach about this to show, whether it's military officers or whether it's people in business or University of Chicago students, oh my goodness gracious, you think this is gonna be a w- a strategy that's gonna work in your interest.

[00:34:09] Man, does it generate push, pushback that you just can't believe.

[00:34:14] **Nate Hagens:** So now I have a series of even more uncomfortable questions. Given what you just laid out, what are the chances which 18 months ago I personally, who am not an expert on the Middle East, would've thought unthinkable, that because of Uncle Alvin, s- behaviors, that Saudi Arabia makes a deal with Iran?

[00:34:43] The, you know, the Shias and the Sunnis and maybe the US police force isn't what it cracked up to be, and the petrodollar and all those other things. Is that possible, something like that?

[00:34:55] **Robert Pape:** It's possible, but that's not the worst case for Saudi Arabia. So Saudi Arabia is, really in, a tough place right now.

[00:35:05] And so Saudi Arabia, the leader of MBS, was egging Trump and Netanyahu on to do the regime change bombing on February 28th, and that story has now come out, been published in The New York Times, which means everybody in Tehran knows about that story.

[00:35:26] So this is a very different thing now.

[00:35:29] So for MBS, it's also true of the UAE leaders, they're really in a very difficult position. So, in April, you can see this with Saudi Arabia. After April 8th, we had a short ceasefire here. This is, and then Trump put on the blockade. Well, then Trump wanted to do some bombing and use the airspace over Saudi Arabia, and MBS, the leaders of Saudi Arabia, said no.

[00:35:57] So President Trump, and we could-- you can go back and see this on his Truth Social, said, "Okay, they said no, so I'm not gonna do that bombing, that I said I was gonna do because of that lack of the airspace." Well, so that is a way you could say, "Well, isn't that them trying to make a deal?" I think they are.

[00:36:13] They were trying to move from strong support for the war to a position, if not, they're not pro-Iran, but, more in the position of neutrality, trying to keep out of it now. This was never gonna work, Nate. And so what you have is a situation where first it's now the Houthis going after Saudi oil. But this doesn't have to end with just Saudi losing the five million barrels of oil a day and all that money.

[00:36:39] There's a real chance here that you're gonna, you're gonna start to see Iran will start to do things under the radar. There are lots of tribes and leaders in Saudi Arabia that are not so keen on the current House of Saud. It's not that they necessarily wanna roll into Riyadh and actually literally have physical control of the government of Riyadh and so forth.

[00:37:04] but it's more like what Putin wants in Kyiv when he says he wants a new government in Kyiv. This is very likely going to be true in Riyadh. And now, MBS and the four thousand princes, they will probably try to cut a deal. But I don't think this is gonna be very easy for them because this isn't good enough to just kick the Americans out.

[00:37:24] They went and they killed-- They, you know, this wasn't a... it's hard to imagine, but, just kind of imagine if Iran, and it-- we may not have to imagine it, but I hope it doesn't happen, of course. But a, if Iran or a foreign country assassinated our president of the United States, killed the first lady, killed the, first family, killed half of the members of the cabinet, killed a third of the members of Congress in both the House and the Senate, and then the allies of Iran who helped support that, here and egged it on, s- come to the United States and say, "Oh, gee, we just wanna make a deal now and all, you know, forget about all this."

[00:38:06] I just don't think this is human nature, Nate.

[00:38:10] **Nate Hagens:** So given how the conflict in Iran has gone and building on what you just said, how would you describe the United States' power on the global stage today, militarily, economically, and in terms of general influence? So

[00:38:24] **Robert Pape:** we've gone from a position of, near preeminence.

[00:38:28] So we never really were fully preeminent, of course, okay? But we've gone from a position of near preeminence to a position of vulnerability And that's a dramatic shift, Nate. And so within the Persian Gulf area, what I mean by vulnerability, from preeminence to vulnerability, is if we go back to February twenty-seven, we look at the posture of the United States in the Persian Gulf.

[00:39:00] We have thirteen military bases, pristine military bases. We have fifty thousand troops there who support those military bases. And what happened, in the last few months, and we just literally, this morning have a new, report out from the Pentagon admitting all this, what I'm about to say, but we've known this for a while, which is those thirteen air bases have been severely damaged, parts of them obliterated, hundreds of buildings.

[00:39:30] The Fifth Fleet, it's called, that's the fleet for the Navy that handles this a- area of operations, AOR it's called, is in Bahrain. And that has been pummeled, that base. And that's one of the huge reasons why the Abraham Lincoln couldn't get resupplied and had to go all the way back many, miles away to Diego Garcia.

[00:39:57] And so th- that structure now has been effectively obliterated. And on top of that, they're now threatening our carriers with Mach five missiles, which we cannot stop with our Aegis class cruisers. So, this is-- They, they're not just the presence here. So that's why I describe it. We were clearly the n- preeminent in the Persian Gulf And now we're vulnerable

[00:40:26] **Nate Hagens:** So the move from, in this context, the move from preeminent to vulnerable and the 13 military bases, and the satellite infrastructure being moderately to severely degraded, how much does that directly or indirectly degrade the global seigniorage the United States gets from the petrodollar and the funding of our treasury markets and our financial hegemony, vis-a-vis the rest of the world?

[00:41:00] **Robert Pape:** Yeah, so it's gonna squeeze that seigniorage, Nate, until there's a pop, okay? And what it is, back to these five, these governments, Kuwait, Iraq, Bahrain, Qatar, the UAE, Saudi Arabia. So I'm just going through these, where the base is. I'm focusing- Yeah ... on the governments where the bases are. but those bases- those governments were direct accomplices.

[00:41:27] Now what does that me- connect to the seigniorage? So these governments have central banks, and you know this very well, better than I do, but they have central banks. Those central banks, every quarter, maybe every day, but certainly every quarter, are buying US Treasury bonds with the dollars, the petrodollars.

[00:41:46] That's what we're talking about, that system that Henry Kissinger put in place. Well, when I'm describing Iran creating political instability in the governments The key, I think, is for Iran, what they're-- the kind of measures of merit they're gonna be looking for is, shaking the governments up enough that they will stop buying those bonds, and then maybe even getting a little more influence so that they will flood the market with those treasuries on the demand or will of Iran if and when Iran decides to do that.

[00:42:20] So that the whole system here depends on these governments being autonomous under the protection of the United States. And when you take that protection of the United States away, and in this case, it's not just the protection, but those governments were direct accomplices in this war. You've cr- you're, creating, a, a regional hegemon in with Iran, and that's now happening.

[00:42:51] and Iran is not just gonna weakly spread its wings. It's gonna be thinking about getting more and more power. And what's the power be-- Once you control Persian Gulf oil, the twenty-five million barrels, what's the next level of power? Financial power.

[00:43:09] **Nate Hagens:** So eventually trading oil and natural gas in a basket of currencies and not the US and-

[00:43:17] **Robert Pape:** something like that.

[00:43:18] Yeah, so we see this at the BRICS. we're seeing the discussion. The president of Iran was just at the BRICS summit a few days ago, and he gave a speech where he said, "We're not looking for oil to be traded in yuan alone. We're looking for some sort of basket of currencies." I think this is gonna have to get worked out, Nate.

[00:43:42] I think it's a little, in terms of the exact co- you know, contours of how this will work, I think that time will, will need to develop that. But in terms of the direction and what's underneath it, which is power, that's the point I'm trying to make. This isn't just where Iran's looking to make a few more cents on the dollar.

[00:44:05] no, This is what was wrong with the whole approach on the MOU, Nate. J.D. Vance and company thought, "Oh, yeah, there's something... How much do you want here? We're just gonna give you, pay you here." No, this is not a business deal. This is great power politics of the first order, and what that means is power dominates, and that is what Iran is gonna want.

[00:44:25] And then over time, they'll kind of figure out the exact complexities of this. And by the way They're, the pre- the, Arachi, the president of Iran, oh my goodness gracious, you know, they can't stop talking to- about every country in the world. I mean, that makes me very nervous. I mean, they're c- as an American, I want us to be the strongest, y- you know, richest country in the world.

[00:44:47] And what do I see? I see, you know, the, the W- Washington can't talk to anybody, and if- and constantly threatening them. And what do I see? I see Iran is constantly talking with all these others... And now Modi, I mean, oh my good- that's the leader of India. Oh my goodness gracious.

[00:45:05] **Nate Hagens:** It's hubris and overabundance and history catching up with us.

[00:45:14] **Robert Pape:** Yes.

[00:45:14] **Nate Hagens:** How does, not to further complicate an incredibly complex situation, but as Iran is seeking more power along the lines of what you're describing, how do China and Russia fit into that with their relationship with Iran? Presumably they would want more of the energy and gas tilted towards the East rather than the West going forward, and global power.

[00:45:40] What are your thoughts?

[00:45:41] **Robert Pape:** Yeah. Well, I think this is what you saw happening in April and early May with Arachi, which is they were flying to Moscow, they were flying to Beijing. They were building alliance relationships here. Now, the only leaks that came out of those meetings were the words a new security architecture.

[00:46:05] Once I heard those words, Nate, and I saw who was talking to whom, I realized that's a new security architecture with Iran wanting to get support from their big allies, Russia and China, that does not include the United States. So the United States is not part of that, and that was enough for me to understand where we're really heading here.

[00:46:27] So it's the USA, the other partner. So I think that the fact is China is gonna be very happy with the United States losing this war, and it doesn't want America to win the war. Why? Because then Donald Trump will have his hands on the throat of the Hormuz artery with that oil going to China, and he can then cut it off whenever he wants to.

[00:46:54] Now, he may never cut that off. Maybe he'll never do it, Nate. But from China's perspective, they've always sided with the rival to America. Same with Russia. They also have the same sets of incentives, and this is just incentives. This isn't ideology. This is just great power politics playing itself out, and we're just not-- we're just not in the game.

[00:47:19] We're not even following what's occurring. That's what's so dis- depressing.

[00:47:24] **Nate Hagens:** You are a world expert in political science and have spent your career, writing about it, talking about it, teaching. Let me ask you to put an anthropology hat on for a moment. Okay. Is this who we are? are we just midway between bonobos and chimps and kind of like the aggressive military chimps in Planet of the Apes movies?

[00:47:50] I mean, is this a story that just unfolds over and over in our genome?

[00:47:56] **Robert Pape:** So I am looking into this right now for the next book. Because I'm looking at other countries that have started preventive wars, and I'm going to do deep dives into them. I want to go and I want to understand more why these countries are very strong...

[00:48:17] Germany before World War I, Germany before World War II. Japan was strong in the Pacific before World War II, by the way. Russia is strong versus Ukraine in two thousand twenty-two. Here we are, strong, the United States against Iran. In all those cases I just laid out, all those countries launched preventive wars that turned out to be disastrous for them.

[00:48:41] Disastrous. After all, Germany and Japan after World War II were occupied. So I think that these big powers, and I'm putting us in this, when you talk about hubris, when you talk about overconfidence, when you talk about cultural superiority, we just have a better culture, here. I think this is something that seems to be a recurring pattern.

[00:49:06] And it's sad because th- these are self-inflicted wounds.

[00:49:11] **Nate Hagens:** So there's some mass behavior of aggregate humanity that is a recurring pattern is you're trying to unpack and suggest I, I think

[00:49:22] **Robert Pape:** it might simply be that when you have inordinate power, this preeminent power, and those countries in those regions I laid out had the inordinate power, it just leads to this overconfidence and hubris

[00:49:40] **Nate Hagens:** So what are the

[00:49:41] **Robert Pape:** chances, given

[00:49:43] **Nate Hagens:** the catastrophic, self-harm this is doing to the United States and the world in the intermediate and beyond term, that we do a massive attack on Natanz and then wash our hands and walk away?

[00:49:58] **Robert Pape:** Oh, you mean Pickaxe Mountain.

[00:50:00] **Nate Hagens:** Yeah.

[00:50:01] **Robert Pape:** Yeah, Pickaxe Mountain. Yeah. So the next set of stages here for Iran gaining more power, it is tightening the noose around not just Hormuz now, but tightening the noose around all the bypasses so that it's not-- A- as you just explained, it doesn't control all 25 million barrels a day, but it's controlling quite a hunk of that, and that would probably tighten more.

[00:50:27] What would be the next bigger thing? It is a nuclear test. The next thing you're seriously gonna think about doing is doing, one or two, maybe two nuclear tests in October. And these would just be tests. There wouldn't be bombs going off in Tel Aviv. These would just be tests. Wouldn't that also, risk him retaliating using tactical nukes or other things?

[00:50:55] Like, isn't there that risk? It-- There is. There is. And so I'm gonna write about these down the road. So next week, stay tuned to the Escalation Track. But I'll just give you some preambles here, Nate, because this is too serious of a subject. You see-

[00:51:10] **Nate Hagens:** It's a nervous laughter that I have here.

[00:51:12] **Robert Pape:** No, I understand.

[00:51:13] And it's good, though. You know, people say, "Why is Professor Pape laughing sometimes?" We're dealing with some really serious things, folks. I've been doing this for 35 years. You gotta let some of the steam off, okay? And that's what's happening here, and it's okay. It's okay. You're gonna get some people who are gonna, you know, say something on the edges.

[00:51:30] But look, this is serious stuff, all right? And so for weeks now, we have been hearing that there are people, quote, in the administration thinking seriously about tactical nuclear weapons against Pickaxe Mountain. Just last week, Georgetown Center released a report by CSIS about the increased activity at Pickaxe Mountain.

[00:51:58] What that is, Nate, is preparing the public for future operations against Pickaxe Mountain. Now that-- why would that be important? Because what I'm describing to you is exactly the dynamic, okay? Which is, once you see these operations at Pickaxe Mountain, you see right away that this is heading toward an October surprise.

[00:52:22] Now, it may happen in November, it could be in January, but it, it-- there's, re-- Now, and the risk is you say, "Well, won't they use a tactical nuclear weapon?" Well, Iran is a win-win situation here. A win-win, Nate

[00:52:36] **Nate Hagens:** Well, but if we do use a tactical nuke, on top of the pollution or all the other things I don't understand, it makes the escalation trap worse because then we- Yep

[00:52:46] look at what... We just broke the 80-year taboo, and it's the United States that used nukes again.

[00:52:52] **Robert Pape:** and let me get into your area, Nate. Once we start lobbing tac nukes here at Pickaxe Mountain, and we start telling the world the radiation's not a problem, don't worry, it won't be a problem. Yeah, not a problem in Washington, but quite a problem in the Middle East.

[00:53:11] what do you think that's gonna be the next time we have an auction for our 10-year Treasuries and our 30-year Treasury? Oh, this is so bad. This is so bad. I've been studying worst case scenarios by administrations and interviewing them on the NSC for decades 'cause I wanna know, what are they really thinking is the worst case?

[00:53:31] And believe it or not, they don't develop the worst case that actually happened to them, and that's why they get in so much trouble. In this case, President Trump, on February 28th, we killed the Supreme Leader. Okay, that's a Saturday. On Monday, which is March 2nd, he's interviewed in the Oval Office and asked, "What's the worst case that could happen?"

[00:53:51] And what comes out of his mouth? Not Hormuz. Okay? Not Pickaxe Mountain. Okay? It's just, "Oh, it'll just be a, another version of, the same kinda leader. Not... There's no worst case here." Well, the problem here is there's a real worst case to using tactical nuclear weapons, and that worst case starts with the fact we're 40 trillion in debt, and we need people to buy those bonds.

[00:54:17] Now, probably eventually we can raise the interest rate, but what they're... The interest rate on the 30 year is, what, 5.3%, I think this morning, something like that.

[00:54:26] **Nate Hagens:** Yeah. Yesterday 10-year notes hit 5% for the first time in decades.

[00:54:30] **Robert Pape:** Well, okay. So let's say those jack up to 8%, Nate, or 9%. You probably know better than me.

[00:54:37] **Nate Hagens:** It would kill the economy.

[00:54:40] **Robert Pape:** Yeah. So this is... The problem here is not that nobody will ever buy the bonds at any price. It's that people are gonna be doggone mad at the United States, and if they take a hit in the value of their bonds, that's... I'm just telling you, people are saying, "Oh, no, they'll always buy our bonds, you know.

[00:54:59] They need us." I'm telling you, this is too dangerous. We're playing with fire, and we gotta understand the way the world is gonna think about that and what they're really gonna think about America as pariahs.

[00:55:16] **Nate Hagens:** What is the best case from this moment, given everything that you've covered? And do...

[00:55:22] You obviously have connections and have advised presidents and security councils and White Houses in the past. What would you recommend to them now, given we're so far down, this escalation trap?

[00:55:37] **Robert Pape:** Yeah. So, the real best case here, Nate, and it's particularly hard to do today, but it might be possible in January, and I'll explain why that difference in just a moment.

[00:55:48] the real best case is that we move to a multi-year strategy where the goal becomes not regime change and not walking away, but regional stability, where we try to build over time a new balance of power that does not depend on the United States in the region. The alternative name to this, offshore balancing.

[00:56:19] and this is where the United States, still very powerful, still has a role to play, but only does maybe twenty percent of the heavy lifting here with military force. The lion's share is done by local actors. Now, there's several examples of this in the last ten years. One is the strategy that beat ISIS.

[00:56:44] Nobody in Washington at that point in time thought you could beat ISIS, and they didn't think you could do it this way. But what I advocated for was we would use air power, but as the minor element, and we would spend months building a ground power coalition. and that would include with the Kurds in Syria.

[00:57:03] and that's what we did, and that's why we use-- Americans are always focused on what we do, and especially air power is very glitzy. But the truth is, what beat ISIS was eighty percent the ground elements here, and we helped on the edges, with the air power. And that is how you actually rolled back ISIS, but it took four solid years.

[00:57:25] So anyway, the other example I wanna lay out for you is Ukraine. How is it the case that Ukraine, after four and a half years of this bloody war of attrition, is actually tilting the tables now and getting a bit of the upper hand?

[00:57:42] **Nate Hagens:** Because of drones?

[00:57:44] **Robert Pape:** Now-- But it starts, Nate, in two thousand fourteen when after, Putin takes Crimea in two thousand fourteen, the big thing America does is send military advisors to Ukraine to help them organize a professional military.

[00:58:07] It's not the money. So when you look and you Google US support for Ukraine, everybody's focused on what is the number of dollars? How many javelins did we give? Well, you know what? If you don't have captains, lieut- majors, and lieutenant colonels who actually know what they're doing, these are the mid-level officers in a professional military, or the senior non-commissioned officers who actually know what they're doing, Nate, none of that money matters.

[00:58:37] And we know, because we give it to lots of countries, and that's how you get lots of wasted money. What we did with Ukraine is we spent years helping them organize a truly professional military, and that is why they've been able to not get defeated by Putin's lightning assault in February '22 and actually then build the drones.

[00:59:03] And drones are important. There's a whole lot of technology there. Of course, I believe in that. But what's underneath it, Nate, that is not part of the standard discussion on social media is what every military professional knows. W- They may not tell you this on social media because the bottom line is it's not sexy, which is like talking logistics.

[00:59:23] If you wanna win wars, you gotta have-- you actually have to have mid-level officers that know what they're doing, and you gotta have logistics.

[00:59:31] **Nate Hagens:** So, so the, the best-case scenario and the advice that you would give would be ground troops?

[00:59:39] **Robert Pape:** No. No. Military advisors to the frontline Gulf States to help them build actual militaries.

[00:59:48] The issue here is the Gulf States, okay? They are used to living in a world where America is the protector.

[00:59:59] So they have militaries. They do things with their militaries. They train with us. When I taught for the Air Force, we had officers from other countries come. So I'm very familiar...

[01:00:10] I'm not telling you that there's nothing there and they're not, well, professional in a sense. But in terms of actually being able to do, major operations or even concerted, say, right now, for example, we have a US blockade, and it's the American blockade that's doing this. Why is it America who has to threaten Iranian tankers?

[01:00:36] The Saudis, perfectly capable of running drone technology. The UAE, perfectly capable of drone technology, okay? This is not necessarily a US mission. And notice how expensive it is for the US to do this mission. And if you wanna understand what would be a third alternative to the strategy of walk away or escalate back here, it's called offshore balancing, and this is, this is an actual strategy.

[01:01:08] It's not just wishful thinking. We've done this before. This is the strategy that has strengthened Ukraine. This is the strategy that beat ISIS, and it-- but it takes time, Nate.

[01:01:20] **Nate Hagens:** So given everything we've just covered, do you think it is fair to say that the United States is on the precipice of a period of decline as a singular global superpower?

[01:01:32] And if so, what do you think the implications are for the rest of the world and for the people living in the United States as you and I do?

[01:01:40] **Robert Pape:** So number one, we are on the brink of a decline as a superpower, where if the current trajectory continues, we're gonna have to pull back and be happy with being a regional power in the Western Hemisphere.

[01:01:54] So just to be very clear, that's what that would mean. Right now, we're a superpower. We have global influence. People all around the world pay attention to us here. This is, when we're on the precipice of this shrinkage here back to the Western Hemisphere. number two, it's not inevitable at this point.

[01:02:13] It's not yet inevitable. I do believe, and it might have to be starting in January, that we might be able, after we get through the midterm elections, to have a long enough time horizon to truly develop an alternative approach here. So that's my big beef is that we-- I ca- you can't do it with the current time horizons of the pol- political leaders right now.

[01:02:36] but number three is what, does that look like, Nate? This is a world for us and for everybody else that's much more conflict-prone. Much more conflict-prone. And the reason is because America's preeminent power has been a stabilizing force in many parts of the world. Now, it's not been perfectly stabilizing, absolutely.

[01:03:05] We've done dumb things, absolutely. This is not-- I'm not saying that we're in any way done everything just right. But you take out the United States, and I was just in Brussels with Euro- Euro- the members of the European Parliament here. This is a very different world that Europe is moving into because the world that Europe, those people in the EU Parliament are dealing with, is no longer America's will to support Ukraine.

[01:03:33] This is America incapable of supporting Ukraine. That's a different world. The world-- I haven't been-- I've been invited-- I haven't been to South Korea or Japan yet, but I can only believe they're going through the same conversation. Before this war, would America have the will to continue to support the alliances?

[01:03:55] Now the question is, does it have the capability to do it, or is it just making those countries targets? And what you are seeing here is, this also the frontline Gulf States. So you are seeing a world where there's gonna be, a lot of different actors, a lot of power vacuums are going to emerge, and in power vacuums, that's another area I study, here you get a lot of escalation.

[01:04:24] This is a very conflict-prone world. So this-- we're gonna miss the days before this war. This was a bad one.

[01:04:34] **Nate Hagens:** Yeah. So in the one minute or so we have left, do you have any advice for the people listening, to what you've just laid out, here today? I think the big advice is to, I think look

[01:04:49] **Robert Pape:** to social media as a source of optimism and, to try to embrace and engage the true depth that is now becoming possible so that we're not just whining, we're not just picking sides.

[01:05:01] I would stay away from the social media that's just team A, team B. Are you pro-Israel against Israel? Are you pro-Russia against Russia? This is... Of course there's gonna be team politics, but what we have as a possibility here with social media is just much more depth than that. And so the fact of the matter is, I think people are hungry for depth, and I think social media here can provide that opportunity, and that's what I would say.

[01:05:28] What to do here is, you wanna stay ahead of risks, okay? But you wanna also see that we're evolving, and this is all to the good.

[01:05:37] **Nate Hagens:** It is. I hope you're right that we're still evolving. Professor Robert Pape, thank you. This was very informative and so much more to discuss. Thank you for your work, and to be continued, my friend.

[01:05:49] **Robert Pape:** Absolutely. Thank you, Nate.

[01:05:51] **Nate Hagens:** If you'd like to learn more about this episode, please visit thegreatsimplification.com for references and show notes. From there, you can also join our Hilo community and subscribe to our Substack newsletter. This show is hosted by me, Nate Hagens, edited by No Troublemakers Media, and produced by Misty Stinnett and Lizzy Sirianni.

[01:06:13] Our production team also includes Leslie Batt-Lutz, Brady Heyen, Julia Maxwell, Gabriela Sleiman, and Grace Brunfelt. Thank you for listening, and we'll see you on the next episode.