Bill Walton (00:00):

Welcome to the Bill Walton Show. I'm Bill Walton. And as everyone knows, events in the world have been simmering and now they've reached a boiling point, and particularly with the flashpoint in Israel with Iran lobbing drones and missiles at them. We need to figure out where this is going, and to do that, I brought in two of the smartest geopolitical strategies around.

(<u>00:25</u>):

Dr. Stephen Bryan, who's a senior fellow at Center for Security Policy in Yorktown Institute. He has over 50 years experience, including many years in the Pentagon where he became our leading expert in the arms trade. And he writes on Substack under Weapons and Strategy and Brandon Weichert, who's been called the most heart-stopping analyst around. He's author of the Shadow War: Iran's Quest for Supremacy, and he's a terrific geopolitical Analyst and publishes the Weichert Report. And my last show with Brandon, and I've had multiple shows with those Stephen and Brandon, and I think you'll find they're probably the one place to go to learn what's going on.

(<u>01:09</u>):

Anyway, my last show with Brandon, at one point during the conversation, we wondered whether we needed to put up a warning label in the episode, which would be, "Beware: gloomy scenarios. This is dire, children." Well, that was about four months ago, and it turns out that dire is putting it mildly Stephen. Why don't you go first? Where are we with ... Well, that's a big question. But we're now April 15th and we're going to be putting the show out within the next day or two. Where do things stand Iran, Israel?

Stephen Bryen (01:49):

Not sure yet, because the Israelis haven't made up their minds, what, if anything, they're going to do about what happened. The Israeli security cabinet met today, and may still be meeting actually at this moment. And they're under a lot of pressure, especially from the military in Israel to retaliate for what the Iranians did. They're also under a lot of pressure from the United States and the allies for Israel to do nothing. So we're in a box right now on that, and it's hard to say how it's going to play out.

Bill Walton (02:30):

Well, you put out a piece that talked about the effectiveness or a lack of effectiveness of the Iran Iranian strike. They lobbed something like 185 drones and all 185 were shot down.

Stephen Bryen (02:46):

Yeah. Lots of drones, lots of ballistic missiles, over 100 of those, and 30 cruise missiles. So they fired off a lot of stuff. In fact, what I've been saying to people is this is the biggest single attack of that kind in modern times. There's nothing that compares to it. The amazing thing was that between the Israeli air defenses, both airborne and ground-based, the US, both airborne and sea-based, and Jordanian air defenses, and I'm not sure what the Saudis did or didn't do, that they were pretty much all knocked out except for seven ballistic missiles that hit Israeli territory. Seven out of 120, something like that. So on the whole, it was an amazing demonstration of that you can have air defenses and they can work, even under very extreme circumstances. So that was the good news.

Bill Walton (<u>03:54</u>): So BrandonStephen Bryen (<u>03:54</u>): And the other good news ...

Bill Walton (<u>03:55</u>): No, sorry, go ahead. Go ahead.

Stephen Bryen (03:57):

I was just going to finish that the other good news was that you had Jordan and you had Saudi Arabia for the first time actually defending a Jewish state. You have to take that on board because that's historical. That's an incredible thing, and I don't think people have grasped it yet, but it's a really big deal.

Bill Walton (04:21):

Yeah. Well, Brandon, your book is titled The Shadow War. Well, Iran has definitely come out of the shadows right now. And does this point that Stephen raises about Saudi and the others coming to Israel's defense, does that have to do with the Shia-Sunni split? Or two-part question, why now, and does this represent a fundamental long-term divide among the Islamists, the Muslims?

Brandon Weichert (04:52):

Yeah. Yeah, that's an excellent question. The short answer is yes. There are more nuances here behind why Saudi Arabia and Jordan did what they did, but I definitely would say, particularly for Saudi Arabia's involvement, there was a sort of religious element, this kind of religious Cold War that's been going on between the Kingdom of Saudi Arabia and the Islamic Republic of Iran. For your audience's sake, I'll just elaborate. Iran is a Shiite, ethnically Persian country in a predominantly Sunni Muslim, ethnically Arab region. And so there is this long-time feud between the two sides going back to the seventh century when the original Sunni-Shia split occurred. And in the beginnings of my book, I sort of trace the history there and how that translates to modern geopolitics. And so that was at play. I also think that the United States under Trump really midwifed a new form of diplomacy for the region, which was the Abraham Accords.

(<u>06:02</u>):

The Biden administration came in and basically tried to kind of neuter or nullify that agreement. But the regional players like Israel and Saudi Arabia still kept sort of trying to make the Abraham Accords work without the Biden administration. And in fact, as you and I spoke about, I think the last time I was on, the whole October 7th, the context behind that attack, a few weeks before that attack occurred ... Now, Hamas was planning this for a while, but the triggering point for that attack, as I see it, was the Netanyahu UN speech from 2023 when Netanyahu held up a map entitled, "The New Middle East." And it was documenting visually for the audience how Israel was aligning some of its security interests with Saudi Arabia in keeping with the Abraham Accords. And this is my assessment, I believe that the Iranians were wigged out by that.

(<u>07:04</u>):

And basically we know Hamas has been working for Iran to some degree, and in my opinion, they initiated the attack when they did, how they did, as part of a larger strategy by Iran to basically nullify or force the Sunni Arabs to divorce themselves from the Israelis, knowing that Israel would have to go in to Gaza in response, and that would alienate so many Arab Muslims in the Arab community. Interestingly though, behind the scenes, I have been told, and I heard David Goldman recently, our mutual friend, reporting this at the Asia Times about a few months ago. It sounds like the Saudis behind the scenes are

diplomatically still very much in coordination with Israel, as are the Jordanians when it comes to Iranian escalation. And I think you saw that on display yesterday, and I think Stephen is completely correct when he says that we should acknowledge this and should take some kind of heart from that, all things considering.

Bill Walton (<u>08:09</u>):

Stephen?

Stephen Bryen (08:11):

No, I completely agree. I think that's the big news. If you want big news, that's big news.

Brandon Weichert (<u>08:17</u>): And it's positive

Stephen Bryen (08:20):

And positive news. But I don't trust the Biden administration on this at all. They're homewreckers. They didn't like the Abraham Accords. It's not clear that they don't like Iran. They may very well like Iran. That's the problem with these guys is they're on the wrong side of history. And so we have this problem with Biden and his administration is very bifurcated. On the one hand, "We're defending Israel, we're doing everything for Israel." On the other hand, "They can't retaliate, they can't do anything." I will take my hat off to CENTCOM, because I think CENTCOM was extraordinarily important in coordinating not only the Israeli and US, but the other players at Jordan and Saudi and probably others in the region too, and they did a great job. Militarily, they did a great job.

Bill Walton (09:14):
CENTCOM stands for?
Stephen Bryen (09:16):
Central Command.
Bill Walton (09:17):
Okay. Our guys?
Stephen Bryen (09:19):
Yeah, our guys.
Bill Walton (09:21):
Yeah, evenStephen Bryen (09:23):
General [inaudible 00:09:25] they did aBill Walton (09:25):
Did Lloyd Austin know what they were doing?

Stephen Bryen (<u>09:26</u>): Huh?

Bill Walton (<u>09:28</u>): Lloyd Austin obviously was out that day.

Stephen Bryen (09:31):

Oh no, I think Austin's okay on this. I don't think he's the problem, and I don't think that Pentagon's the problem here at all. The problems in the State Department and the White House, maybe in the CIA, I'm not so sure, but certainly in the White House. And there is one gal in the Pentagon who's Iranian, and who works on very sensitive things. I don't know why she's there. And God knows what they're doing in the State Department. They're all POO people.

Brandon Weichert (<u>10:00</u>):

Don't forget also Bob Malley and all of those guys that Biden brought in who are pro-Iran as well.

Bill Walton (<u>10:03</u>): Explain-

Stephen Bryen (<u>10:03</u>): Well, he was, but theoretically he's gone.

Bill Walton (<u>10:04</u>):

Go ahead. [inaudible 00:10:04] explain who that is.

Stephen Bryen (10:10):

Rob Malley was in the State Department. He was the head honcho for the US-Iran negotiations on the nuclear problem. But he ran into some kind of security problem, let's call it that, because they've never told us exactly what it was. And he was kicked out of the State Department, and now he's at Princeton, of course.

Bill Walton (<u>10:34</u>): Well, that's where they always land, at Princeton or Yale or Harvard.

Stephen Bryen (<u>10:39</u>): But anyway-

Bill Walton (<u>10:40</u>): Aren't his parents Iranian? Isn't he Iranian?

Stephen Bryen (<u>10:43</u>): Say again?

Bill Walton (<u>10:43</u>):

Is not he Iranian? I think-

Stephen Bryen (<u>10:46</u>): No, I don't think so.

Bill Walton (10:47):

I know his parents were radical and they were very much in-

Stephen Bryen (10:50):

Radical is one thing. He was certainly radical. That's the problem with the administration. There's a lot of this pro-Palestinian, pro-Iranian garbage there that is influencing strategy and harming our ability to solidify the Middle East and keep it safe. The whole idea that you can make deals with Iran while it pursues its nuclear program and subverts all the countries in the region makes no sense whatever.

Brandon Weichert (<u>11:28</u>): Right. I agree.

Stephen Bryen (<u>11:30</u>): I'll leave that to Brandon, but he's the expert.

Brandon Weichert (<u>11:34</u>):

I guess. But no, you're right. You're right. And also I think Trump last night was at a rally and he made the comment that, "This wouldn't have happened under me." And I think as whether people like him or hate him, this wasn't happening under Trump. This wasn't happening for four years. We had a relatively stable Middle East that was actually, our allies were being empowered, and our enemies in Iran were being contained and constrained. And so I-

Stephen Bryen (<u>12:03</u>):

Which is very interesting. Brandon, there's a really good point to make here.

Brandon Weichert (<u>12:07</u>): Yeah.

Stephen Bryen (<u>12:08</u>): Trump got rid of Soleimani.

Brandon Weichert (<u>12:10</u>): That's right.

Stephen Bryen (<u>12:12</u>): Do you think that the Iranians retaliated? They certainly didn't.

Brandon Weichert (<u>12:16</u>): Right. That's right.

Stephen Bryen (12:16):

Because they knew if they did, they were going to get fried.

Brandon Weichert (12:18):

That's right. I just have an article at the National Interest talking about what the difference four years makes. Remember, after we got Soleimani, remember Trump was not supposed to do this. It's very destabilizing. He did it. He took out Soleimani. The Iranians were set back for years in terms of their grand terrorism campaign. It bought us a lot of time and peace and quiet. And the Iranians after that incident, they threatened, just like they did after the Israeli strike on the Iranian Consulate in Damascus a week ago, the Iranians threatened to unleash holy hell upon the Americans in Israel, and it never happened because they were afraid of Trump. Because Trump said, " If you do this, I'm going to go all out on you." And the Iranians knew he meant business. With Biden, Biden looked at the camera and said, "Don't. Don't." And guess what? They did. Within 24 hours, they did.

(<u>13:11</u>):

And actually the thrust of my recent article was saying, it's great that the Israelis were well protected this time. It's great that the Sunni Arabs, along with the Americans and British, came to the assistance of Israel this time. But my concern is the fact that Iran even did this to begin with. This was extremely flagrant for Iran, which tends to prefer to operate, as my book says, in the shadows. And so my concern is that as long as Biden is in power, deterrence is dead in the Middle East, and that is the real scary thing, because it's going to destabilize the region further the longer that Iran and its partners believe that the United States' deterrent ability is not very credible.

Bill Walton (13:56):

What are the limits, if any, on what Iran can do and what are the limits of any on how Israel can defend itself? Because I know what we've done in Ukraine is we've basically run out of ammunition and material. And I understand that if the Iranis are lobbying \$2,000 drones and we're shooting them down with million dollar missiles, that there's an asymmetry there. Can they keep this up, or what does ... Anyway, I'm going to stop. I've got about 50 questions. Let me ask that one. See if we can-

Stephen Bryen (<u>14:36</u>):

Well, they can keep it up.

Bill Walton (<u>14:38</u>):

Try to find the good question inside that preamble.

Stephen Bryen (14:41):

Well, they could keep it up. If there's no answer to it, if you let them get away with it, they'll do it again. There's no doubt about that. I think the problem here is that the normal response when Iran threatened to attack Israel, as they threatened for a couple of weeks-

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Stephen Bryen (15:02):

... as they threatened for a couple of weeks that the right thing to have done is to tell them, "If you fire even one missile, we're coming after you and we're going to knock out your capability to launch any more." That's the bottom line.

Bill Walton (<u>15:19</u>): What would that take to do that Stephen or Brandon?

Stephen Bryen (<u>15:23</u>): Well, I think it's different problems.

Bill Walton (<u>15:25</u>): What would that look like?

Stephen Bryen (15:28):

The first thing you would do, in my opinion, is to knock out their missile fields, because those require preparation and they're liquid-fueled, most of them were liquid-fueled missiles. So they have to fuel them up and it is very visible. Knock it all out, destroy it.

(<u>15:47</u>):

The second thing is take out their command centers because if they can't command, they can't run the show. And so I would knock those out as well.

(<u>15:57</u>):

And then you can go from there. The hard part is the drones, because drones can be launched from almost anywhere. And they launched some from Yemen, they launched some from Iraq, and they launched some from-

Brandon Weichert (<u>16:11</u>):

Lebanon.

Stephen Bryen (16:11):

In fact, the major casualty in this whole episode was in Shiraz, in Iran because one of the drones that was supposed to hit Israel crashed and blew up a piece of Shiraz. It wasn't too successful.

Bill Walton (<u>16:26</u>):

Brandon?

Brandon Weichert (16:27):

I would also say that my concern with all of our rivals right now, China, Russia, Iran, North Korea, my concern is the defense industrial base. Our defense industrial base, as Stephen has written about frequently, is ailing. It's not doing well. We can't even keep up with peacetime demands, let alone the increased demands of the war in Ukraine and now the Middle East and whatever else, Venezuela-Guyana maybe. We don't know what's going to happen next, but there are quite a few conflicts down the line that are straining our defense industrial base at a time when Iran, China, Russia, even North Korea, their industrial bases are not only working very well, but they're actually increasing their tempo. And so that in terms of what can Iran do, the concern that I have is as we've seen them being able to

supply the Houthis, supplying the Hezbollah, helping out Hamas, as well as sending a lot of equipment to Russia for Russia to use in Ukraine, my concern is the defense industrial base of Iran is obviously good enough that they can do all of these things.

(<u>17:40</u>):

And so they can probably try another strike like this again. And as we say in Florida, even a blind pig can find its slop bowl once in a while. And so my concern is that they're going to keep trying to do these widespread direct attacks on Israel and eventually maybe they will get through, because as I said earlier, they don't fear American deterrence.

(<u>18:02</u>):

Something that I would recommend, and this is escalatory, and so we should be very concerned about that given the kind of weaknesses in America, but we might want to entertain notions of actually either with the Israelis or a kind of coalition, striking at Iranian defense industrial-based targets, those facilities that are charged with producing ballistic missiles, charged with producing drones. That won't end the threat entirely, but it will degrade it.

(<u>18:29</u>):

And that's the key. You want to degrade Iran long enough so that our allies in the region, hopefully the Sunni Arabs in Israel can kind of come to a new modus vivendi and maybe establish some new containment protocol for Iran, which was the goal originally of the Abraham Accords.

Stephen Bryen (18:48):

Well, the only thing that's going to really work in Iran is getting rid of the mullahs and changing-

Brandon Weichert (<u>18:54</u>):

Agreed. But I don't think we can afford to do or lead a regime change mission. This is my only real issue with that.

Bill Walton (19:00):

We haven't been very good at that, I don't know why.

Brandon Weichert (19:04):

Yeah, my thought would be contain Iran, replicate the strategy that worked against the Soviet Union, and we contained them for long enough that the system died from within and basically became sort of eviscerated from within. And that would be my hope we could apply that to Iran again and have the Iranian people sort of sweep aside their regime after it's been completely gutted. But right now it's not. And so my worry is the last thing I think we can afford to do is have U.S. Military doing some kind of regime change.

Stephen Bryen (19:37):

Well, it's important to grasp who runs Iran and how it's run and where the power centers really are. And most of it's in the Revolutionary Guard.

Brandon Weichert (19:48):

Right. Which is why Soleimani's assassination was so critical.

Stephen Bryen (19:52):

Right, and why the Israelis knocked out the other guys in Syria. But I think you have to take them on-

Brandon Weichert (<u>20:03</u>): Well, you do.

Stephen Bryen (20:04):

... whatever way you can.

(<u>20:06</u>):

All the other things, knocking out infrastructure, let's call it that, is well and good, but then they're just going to fire off more rockets and more missiles and they're going to accelerate more of their nuclear program. So it's not going to stop them. But the Revolutionary Guard is the key power factor, I think, and I'm not a great expert on Iran, but everything I read and understand is that the power is held by the Revolutionary Guard. If it's broken, then anything's possible.

Brandon Weichert (20:40):

I agree that the IRGC is the primary kind of locus of power in that system. And I think there are things we can do, and I think you saw it under Trump. I think you see it when Israel assassinates these IRGC thugs. I think those are things we can be doing that will weaken the regime. But in terms of direct regime change, I don't think the United States has the [inaudible 00:21:04]-

Stephen Bryen (21:04):

Well, that's how you get the regime change.

Brandon Weichert (21:06):

Right, absolutely. But when people say regime change, I think the assumption is that America would replicate Iraq and we don't want to do that.

Stephen Bryen (<u>21:14</u>): No, no, no. We didn't do that very well, did we?

Brandon Weichert (<u>21:17</u>): No, no.

Stephen Bryen (21:18):

Big failure.

Bill Walton (21:20):

So let's pull back a little bit because it seems like we're entering World War III with all these things going on multiple fronts. We're still dealing with Ukraine-Russia, then over in the other part of the world we need to worry, I think, about Taiwan and how China might be viewing what's going on in the Middle East and what's happening in Ukraine.

(<u>21:46</u>):

And I guess, again, this is a nine part question, but then also, are there other actors that are influencing Iran? Some people have said China. I don't know. They certainly have an interest in destabilizing everything.

Stephen Bryen (<u>22:01</u>): Russia is the big one.

Bill Walton (<u>22:03</u>): How so? What's Russia's role here?

Stephen Bryen (22:05):

Well, because I think the Iranians think that their partner is Russia.

Brandon Weichert (22:09):

Although it should be noted, my understanding is that the original plan for October 7th was to see the Syrian Arab Army opening up a front against Israel after Hamas initiated the attack. It was supposed to be Hamas initiates the attack, Hezbollah opens up a second front, and then a third front would've been opened by Bashar al-Assad in Syria. And it was the Russians supposedly who stepped in and told Assad, "Do not do this."

(<u>22:38</u>):

So I do think you're right that the Russians want to destabilize the Middle East, so enough that the Americans are tied down there, but also the Russians don't want to see the Middle East so destabilized that their interests are threatened. And they do have interests there, notably in Syria. So they have to walk this tightrope where they want to kind of cause us headaches, but not so much so that it risk getting them damaged in the region. It's a very [inaudible 00:23:03]-

Stephen Bryen (23:03):

The Russian strategy is complex. It has been complex for a long time. They have deals with Israel on deconfliction, for example. They look the other way when the Israeli planes fly.

Brandon Weichert (23:16):

There are stories of these joint Iranian bases with Russia, the Russians know the Israeli airplanes are coming in, the Russians order their troops to move to the other side of the base, knowing that the Iranians are going to get blown up on the one side of the base. So they do work... It's very weird, this whole Middle East relationship.

Stephen Bryen (23:34):

I don't think it's weird. I think it has to do with what Russian policy is. And Russian policy is, "Ideally," and I say ideally with quotations and wrapped in more quotations, ideally is to replace the United States in the Middle East.

Brandon Weichert (<u>23:50</u>): Yes, yes. Stephen Bryen (23:52):

That's very simple. So they talk to the Saudis, they make oil deals, that kind of thing.

(<u>23:59</u>):

The Russians don't want trouble with the United States, and they certainly don't. And they have their hands full with Ukraine right now, they don't-

Brandon Weichert (24:06):

And they also have an Islamist problem; they also have an Islamist problem.

Stephen Bryen (<u>24:09</u>): And they have a big Islamist problem, had for years, but now it's hot again.

Brandon Weichert (<u>24:14</u>): Mm-hmm, right. [inaudible 00:24:16].

Bill Walton (<u>24:16</u>): How is Russia's Islamic problem hot?

Stephen Bryen (24:20):

Well, because look at what happened at Crocus Hall outside of Moscow. They were Tajikis, but some of them came from the Russian Islamic areas, let's call it that. And I think it's deeper than that. I think the Russians have had this for years, and they manage it, but it's a big problem for them.

Brandon Weichert (<u>24:50</u>): But there is a reason.

Stephen Bryen (<u>24:51</u>): They're probably complaining to the Iranians, "What the hell are you doing with the Crocus Hall?"

Brandon Weichert (24:55):

Exactly what I was I was going to say. One of the reasons I think they have tried to keep Iran in their orbit is because they're worried about this large Muslim population in Russia.

Stephen Bryen (25:08):

In Dagestan, Ingushetia, those places, which are a problem, Chechnya too.

Brandon Weichert (<u>25:13</u>): Chechnya too, right.

Stephen Bryen (<u>25:13</u>): Even though they subdued Chechnya-

Brandon Weichert (25:16):

Kind of, right. But I think that-

Stephen Bryen (25:18):

... significantly.

Brandon Weichert (25:20):

... the thinking is keep Iran in our tent mixurating out rather than outside the tent mixurating in. And so I think that's some of why they're so intimately involved now with the Middle East. Yes, they want to displace us, but I think they're also trying to figure out how do they manage this population problem they have.

Stephen Bryen (<u>25:41</u>):

Yeah, they have a big one.

Brandon Weichert (<u>25:42</u>): They have a big one.

Bill Walton (25:43):

Is China anywhere in the region? I know China wants to be influential everywhere.

Brandon Weichert (<u>25:47</u>): Yeah.

Stephen Bryen (<u>25:48</u>): But I don't think that China's a big player.

Brandon Weichert (<u>25:52</u>): They're growing-

Stephen Bryen (<u>25:53</u>): [inaudible 00:25:53] has a different view

Brandon Weichert (25:55):

I'm of the view when it comes to China, there's an old line, it was in Lawrence of Arabia, it was also in a 2012 film called Prometheus, Big things have small beginnings.

(<u>26:05</u>):

And so my concern is that just as with China's rise in general, we tend to kind of say, "Well, it's not really that big," but I think that it's a seed that's growing.

(<u>26:17</u>):

Actually, my article with Shoshana's, the Jewish Policy Center, was all about China's growing role in the Middle East. And what we know is that of course, China has large ties to the Middle East now because they get so much oil and natural gas from the region. But that's just sort of the entry point for them.

(<u>26:40</u>):

Because of the tech war that Donald Trump began, and Biden has continued for the most part, to some degree against China, China is desperately looking for ways to gain access to Western technology that is otherwise now being cut off from them. And they're looking at third parties, and they're looking specifically at Saudi Arabia, Silicon Wadi, which is sort of their version of Silicon Valley. They're looking at the Israeli equivalent, I think it's the Herzliya by the Sea, I think is where one of their tech hubs is.

(<u>27:11</u>):

And basically the Chinese are trying to get in tight with these different countries in the Middle East to gain access to sophisticated Western technologies that have otherwise been denied to them over the last few years. And so that is a key point of competition.

(<u>27:28</u>):

And we saw also, when I was writing at the Asia Times last year, this was being reported by the Asia Times, this deal that China brokered between Iran and Saudi Arabia, which was sort of a quasi ceasefire. And then at the same time, China's moving into the region and they're selling ballistic missile technology, not only to their normal allies in Iran, but they're turning around and selling the same systems to the Saudis. So obviously they're trying to become-

Stephen Bryen (27:55):

Oh yeah, but Brandon, that goes back years. I mean-

Brandon Weichert (27:58):

Oh, I know, I know.

Stephen Bryen (27:59):

... the H, I forget what they're called, the H-1's or whatever they are-

Brandon Weichert (<u>28:03</u>):

Right. But what I'm saying is there's definitely-

Stephen Bryen (28:04):

... these missiles were there for 20 years.

Brandon Weichert (28:06):

Sure, sure. Absolutely. But what I'm saying is there's definitely a growing interaction and interest from China in becoming a dominant player in that region, in my opinion.

Bill Walton (28:17):

Well, if they can.

(<u>28:21</u>):

It seems like we pulled back the lens a little bit, even pulling it back further, it seems like the West has lost its mojo. Our ability to defend our Judeo-Christian values, free markets, seems to be waning.

(<u>28:39</u>):

Biden seems to care more about what's happening in Michigan with the Muslim vote there than he does what's happening in Israel. Western Europe seems to be preoccupied with the catastrophe that they've

created with Ukraine, and yet they show no signs of really willfully bringing about any kind of result, so they're just left watching.

(<u>29:06</u>):

It seems like longer term, Israel is maybe the world's last best hope for a liberal free market democracy. And to me, that's why I'm so in favor of preserving Israel and seeing Israel thrive. I don't think Biden's going to ask me if I want to come into his administration though, unlikely.

Stephen Bryen (<u>29:27</u>): He should.

Bill Walton (<u>29:27</u>): So can we riff on that a bit as to where all these-

Brandon Weichert (29:31):

Do you want me to go first? Or Stephen, do you want to take it? I don't really care.

Bill Walton (<u>29:37</u>): You guys are both interesting.

Brandon Weichert (<u>29:39</u>): Okay, I'll just say that if-

Bill Walton (29:41):

I don't have a yellow legal pad here with questions, let's just go where we think this takes us.

Brandon Weichert (29:46):

I've been saying this normally to people on the new right, who tend to be kind of oddly anti-Israel, I keep telling them, "I don't know how you can be anti-Israel, because Israel's enemies are the exact same enemies, not only of America-"

PART 2 OF 4 ENDS [00:30:04]

Brandon Weichert (30:02):

These are the exact same enemies, not only of America, but specifically of the right wing in America, right? I mean, you've got, Israel is this wonderful project of national power. It is, as you said, a free market economy. It's actually very progressive culturally. So I don't understand why the left hates Israel. It's bizarre. Other than the fact that Israel is a strong country with defined, well-defined and defended for the most part national borders and they are proudly nationalistic, which offends the globalists on the left. And that is why you have so many elites in the Western world taking this bizarrely anti-Israel stance. And I think that's the only explanation, one of the only explanations I can think of. There's also the idea of just anti-Semitism, I think that's at play. But I think-

Stephen Bryen (<u>30:51</u>): That's a big piece of it. Brandon Weichert (30:52):

It's a big piece of it, right, absolutely. But there's also this bizarre globalist hatred of nations and nationstates that are strong. And the two strongest nation-states traditionally in the modern era, in my opinion, are United States and Israel. And so we are their number one and number two targets on the globalist left.

Stephen Bryen (<u>31:18</u>): I agree with that. I mean, I think he's right.

Bill Walton (<u>31:21</u>): I don't understand-

Stephen Bryen (<u>31:22</u>): It's bizarre.

Bill Walton (31:23):

I don't understand the anti-Semitism act part. Just in terms of my own background on Wall Street, I spent most of my career as an honorary Jew. I mean, I was Lehman brothers, Kuhn Loeb, and I worked for Bill Paley. He was the Jewish founder of CBS and on and on and on and on. It seems to me that if you want to classify Jews as a group, they've done more to create Western civilization than almost any other subgroup.

Brandon Weichert (<u>31:56</u>):

Well, that's also why they hate them. That's also why they're hated because they really are a foundational block of Western civilization whom the left hates. The left hates Western civilization, wants to tear it down.

Bill Walton (32:10):

I don't know. Stephen, you may have some views on that. I don't know-

Stephen Bryen (32:14):

No, no, I hear what you all say. I think I've experienced-

Bill Walton (32:19):

Your wife's on the Jewish Policy Center, so she may have some influence on you.

Stephen Bryen (32:24):

Well, she would have a lot to say, and it would all be good. But the attacks on Israel are unconscionable and massive. And they're from Europe, from the United States, from Canada. I mean, you can go on and on. It's disgusting. And the level of anti-Semitism has gone way up, way up. And a lot of that it's because the left has made a pact with the devil.

Brandon Weichert (33:00):

Well, actually, if I may, and I might get in trouble for saying this, but I actually do think there's a spiritual component to a lot of what we're going through, and I don't want to get too deep into that, but I do think that you look at anti-Semites, and you look at the left, my friend Michael Walsh, who's a great writer, he has written several great New York Times bestselling books. He calls them the Satanic left. And so I think that's a very healthy way to describe them. And so it doesn't surprise me that they would be opposed to Israel and be anti-Semites because it spiritually sort of confirms their beliefs.

Stephen Bryen (33:40):

Yeah. Well, you look at what's going on in Europe, for example, which have leftist governments for the most part, there's a few exceptions, Italy being one, Hungary being another, but most of the rest of them are lefty and they're very anti-Semitic. I mean, look at Britain. My God, it's a disgrace there. Total disgrace. And you think they're ashamed of it? No, whatever. It's very sad to say the least.

Bill Walton (34:17):

We need different leadership in the United States to step up and step in.

Stephen Bryen (34:22):

Well, President Biden speaks eloquently on this subject all the time. It's not going to say a damn word.

Brandon Weichert (34:32):

It's a phrase I never thought I'd hear President Biden speaking eloquently.

Bill Walton (<u>34:36</u>): Well, on any subject for that matter.

Stephen Bryen (<u>34:38</u>): It takes an effort.

Brandon Weichert (<u>34:41</u>):

I do think it's very telling though, not only on the left. Obviously the left for decades has had an anti-Israel bias. But I'm also getting a little worried by my friends on the new right, who I agree with a lot culturally. But then they sort of start casting aspersions on Israel. And I have to just keep reinforcing this idea that Israel's enemies are the exact same enemies of the right. We should be supporting Israel and standing with them because what it stands for is what we want here in the country. We want the same thing Israel does. And so we should be united on this. And it's very sad when I see the younger people on the right poo-pooing Israel. And I just think that's ... I was very happy, Bill, when CPAC came out and said they were pro-Israel with the platform this year.

Bill Walton (35:35):

Yeah, that was one of our three resolutions at the last meeting.

Brandon Weichert (<u>35:37</u>):

Very important. It's very important.

Bill Walton (35:40):

Yeah. CPAC has gone very ... I'm vice chairman there, and we've gone very deeply into the idea of this freedom movement is global and we've got to protect the ... We can't really protect, but support all the countries that stand for the values that are the right values. And Israel certainly exemplifies that.

(<u>36:03</u>):

So I'm worried. I mean, you two are the national security experts, and one of the things that I find myself when I talk with geopolitical or national interest, things like that, is it seems to me like we've got an awful lot of people playing for our team. And I looked at that picture of Biden last night in The Situation Room at the White House, trying to stay awake with Blinken and Jake Sullivan, and I guess Victoria Nuland no longer makes that room, but all sorts of people who seem to be operating against the interest of the United States in terms of the values we've traditionally stood for. I don't know how we quite reckon with that.

Stephen Bryen (<u>36:44</u>): You-

Brandon Weichert (<u>36:47</u>): Got to get them out of office.

Stephen Bryen (<u>36:49</u>): Tell you, the answer to that.

Bill Walton (<u>36:52</u>): I don't-

Stephen Bryen (36:54):

It's tragic I mean, really. As I said earlier on, the administration has got a lot of bad apples in it, especially in the White House and the State Department and-

Brandon Weichert (<u>37:06</u>):

The CIA-

Stephen Bryen (37:07):

... they're the ones that write, they write the memos for these damn meetings and they tell our leaders what to think, to the extent they think at all.

Brandon Weichert (<u>37:16</u>): That's right.

Stephen Bryen (<u>37:18</u>): And that's prevalent in this bunch. And the only thing you can do about is vote them out of office.

Brandon Weichert (<u>37:24</u>): That's right. Yep.

Bill Walton (<u>37:25</u>):

Where do economics come into play here? Oil, at least Saudi's supporting Israel. I mean, at some point, do even the people that don't support Israel recognize if we blow up the Middle East or that it gets blown up, that that's going to wreck us economically?

Brandon Weichert (<u>37:40</u>):

I think they'd be fine with that. I think that, I mean to build off what Stephen's saying, I mean, we have a lot of bad actors who believe really awful things who, I mean, one of the places I write at is the pipeline.com, where all we do is criticize these global warming fanatics. And most of those fanatics are now running our government.

(<u>38:01</u>):

So I think on some level, they would be fine if the Middle East blew up and we couldn't use oil because they want us to switch over to wind power or whatever. And they don't really care about the economic consequences. And you can see that they don't care about the economic consequences by the fact that they keep supporting policies that are driving up the price of everything. Go try to buy eggs. It's a 300% increase in the price of eggs in the last four years. That's insane. That's because of Biden policies.

(<u>38:32</u>):

And so I think that they would have no problem with seeing the Middle East go bye-bye, and have us rely on inefficient, unaffordable forms of energy. So I think this would be part of their plan.

Stephen Bryen (38:47):

Well, there's also the problem of Europe and its dependence on the Middle East for oil. And Biden's exploiting that right now. That's why he's demanding a meeting of the G7 to deal with the Iran-Israel issue. Well, what's the G7 got to do with it?

Bill Walton (39:06):

That's an economic alliance, isn't it? I mean, it's not a military.

Stephen Bryen (<u>39:09</u>):

Yeah, that's what it's supposed to be.

Bill Walton (<u>39:11</u>):

Yeah.

Stephen Bryen (39:11):

So what do they have to do with it? Well, what they have to do with it, I think, is to promote peace in the area so they get their oil. That's it.

(<u>39:23</u>):

So from that point of view, Biden understands that, and that's what he's pushing. But I don't know how it's going to turn out. I mean, I think that we may be running out of our ability to carry out a policy like we're carrying a pacifist isolationist policy, which is what Washington is pushing. But it's not. I mean, on the other hand, we're making war against Russia. So it's very contradictory, very contradictory.

Brandon Weichert (<u>39:56</u>):

Well, I also ... Yeah, go ahead.

Bill Walton (39:58):

Let's jump over to Ukraine and Russia before we get ... I could talk with you guys all afternoon, but I'm not Joe Rogan, so we can't go onto that length, but we'll get there.

Stephen Bryen (40:10):

You'd wreck your afternoon, too. That's true.

Bill Walton (40:17):

Now that we talked. Stephen, last time you and I talked about the head of NATO was nuclear sabre-rattling. And where is that now? What's the state of play with ... ?

Stephen Bryen (40:34):

Well, of course, I think on the battlefield right now, the Russians are making significant progress. The big fight is over a place called Chasiv Yar, which is to the west of Bakhmut. And it's a crucial town, and there's a big fight going on there. And there's a couple of things there that are very interesting. At least one of the parts of one of the brigades, the 67th Ukrainian Brigade deserted, which is a big deal. And the other part is refusing orders and wants to be evacuated. They're in essentially eastern Chasiv Yar. And the Ukrainian command, which is following orders from Zelenskyy, is trying to move to disband the entire 67th Brigade and also the 25th Air Mobile Brigade. They want to get rid of that one too, because they're not loyal anymore.

(<u>41:42</u>):

So what we're starting to see is big cracks on the Ukrainian side of the war in terms of their ability to keep their side organized and fighting. They're still fighting. But these are pretty dramatic shifts. And I think it's indicating that the breakdown of Ukraine's army is not far off.

(<u>42:10</u>):

And then the other thing to mention is that there's a French foreign legion contingent, officially mercenaries, but they're not mercenaries in a place called Slovyansk, which is in the northern part of Donetsk. And the Russians bombed them today. So the French are bringing their troops in. Even though they say they're not, they are. And they're manning the CAESAR 155 millimeter guns that the French have provided because the Ukrainians don't have any people left to man them. Most of the Ukrainian brigades are operating at 40% manpower. So this is ...

Bill Walton (42:54):

Did the French go in on their own, or did the French act as part of NATO, or did the French act at the ask of Jake Sullivan?

Stephen Bryen (<u>42:59</u>):

No, no. It's supposed to be a secret.

Bill Walton (<u>42:59</u>): Well. Stephen Bryen (43:00):

The secret, clandestine, Bill, you get it. We are not there, but we are there. Don't ask, don't tell.

(<u>43:28</u>):

It's reckless because they'll get killed. They're for sure going to get killed. And this is today what happened is, I don't know how many were killed, but some were. This is an example. And the French government wants to send the 126 Infantry Regiment there, French 126, which is in the south of France to Odessa, and they're also getting killed. So this is getting out of hand very quickly because if the Ukrainian army is starting to crumble and West is starting to send in troops, we're getting into a European war.

Brandon Weichert (<u>44:09</u>): Yes. Yes.

Stephen Bryen (<u>44:11</u>):

And that's madness.

Bill Walton (<u>44:13</u>):

Brandon, you got a thought on that?

Brandon Weichert (44:15):

Yeah. I've been saying for the last year, since last February that Ukraine is lost. It's just a question of when are they going to admit it. And we're now witnessing I think where the policy of really the US ... I mean NATO is basically a vassal now of the US and the US under Biden wants a war in Europe. They want Europe to be completely dependent on the United States for energy. They want Europe completely dependent on the US for military and for any other good. So they don't want to risk Ukraine collapsing and becoming a fiefdom of Russia, which is where it's headed right now. For up until about eight months ago, I was saying, got to get a deal ...

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Brandon Weichert (<u>45:03</u>):

For up until about eight months ago, I was saying, "Got to get a deal, got to get a deal." I don't believe there will be a deal now. The Russians are not interested in it. The Russians believe they have to squelch Ukraine in order to get rid of the bee in their bonnet, which is the notion that Ukraine will become part of NATO. In fact, just a few weeks ago you had NATO leaders saying, yet again, "Ukraine will become a member of NATO no matter what." And so that's not going to lead to an off-ramp. That's escalating. And then you add in the introduction of these French forces.

(<u>45:35</u>):

By the way, there have been mercenaries and volunteers from the US, from Australia, from Canada, Poland, and all these other western nations fighting in Ukraine almost from the start. But now you have French military directly getting involved. They're a NATO member, and I think that they're looking for a casus belli. I think they're going to try to say, " The Russians killed these troops, we are now invoking Article 5, and it's time to go stop the Russian." Stephen Bryen (46:07):

You can't invoke Article 5 if you're not on your own territory.

Brandon Weichert (<u>46:12</u>):

But I'm telling you, they're going to try the case for mutual defense because they're already changing the [inaudible 00:46:19].

Stephen Bryen (<u>46:18</u>):

Yeah, although-

Brandon Weichert (<u>46:19</u>): That's what I'm saying. That's what I'm saying.

Stephen Bryen (46:21):

Yeah, I agree with that.

Brandon Weichert (46:22):

They're going to try to make the case because the western policy is about knocking Russia out. I had a general, and I think I said this to you before, Bill, about a year and a half ago, I was at a base on the West coast and they had asked me to talk about what's going on with Russia and their technology, their space program, etc. The general didn't like what I was saying because I was saying basically this. And he said, "Don't you understand, son?" He said, "We are breaking the Russian army for cheap in the field and the Ukrainians are the ones doing it for us." And I said, "No, sir, that we are not." I said, "If anything, the Russians are breaking us. They're showing NATO to be a hollow force, and they're breaking our defense industrial base and forcing us to overcommit in Europe when we've got real threats in the Middle East and in Asia."

(<u>47:11</u>):

And so that's exactly what's going on. And now we see the sort of knockout effect of Russia becoming a junior partner for China. We see, as Stephen brought up before, Russia is one of the influencers in the Middle East. And so we're witnessing, I think the opening salvos of a real world war maybe in Europe was where the initiation will be, but it will cascade throughout Eurasia. And all of this was a policy of our own making. It was a disaster of our own making.

Bill Walton (47:43):

So Brandon, didn't I start by calling you a heart-stopping analyst?

Brandon Weichert (47:49):

You did.

Bill Walton (<u>47:54</u>):

So how do we recover from that? I mean, Russia happens to have five, 6,000 nukes. I mean, this is-

Brandon Weichert (<u>48:03</u>): Well, that's the thing. Go ahead, Steve. Bill Walton (<u>48:05</u>): Stephen. Yeah, jump in.

Stephen Bryen (<u>48:07</u>):

Well, I was just going to say watch the battlefield. The main way to understand what happens next, I think, is to watch the battlefield. If things keep deteriorating... What happens, it's like escalation. Things deteriorate that way. The momentum increases and increases exponentially. So at some point, we're going to have to face the fact that Ukraine may not be viable.

Brandon Weichert (<u>48:42</u>):

It's not. It's not.

Stephen Bryen (48:44):

And we'll have to face it. And what are we going to do then? I don't think anybody, even the nuts in Europe, including the UK, are prepared to do a war in Ukraine or any place else because they don't have the ability. It's just plain simple. The British say, "Well, we could fight for 10 days." That's optimistic. The Germans say, "Maybe two weeks." That's optimistic. Do you know how many tanks the British have that can be put into the war? 40. And the Germans have less, and most of them don't work.

Brandon Weichert (<u>49:30</u>):

But I think the implication here-

Stephen Bryen (<u>49:32</u>): Who's kidding who here?

Brandon Weichert (49:33):

But I think the implication here is that they expect the Americans to come riding in. And I think Biden might just be willing to do that because he and his team-

Stephen Bryen (<u>49:40</u>):

No, I don't think so.

Brandon Weichert (<u>49:43</u>):

I don't know. I think he and his team have convinced themselves.

Stephen Bryen (49:44):

He'd be impeached tomorrow morning.

Brandon Weichert (49:47):

I don't know. I think he and his team have convinced themselves that to win reelection, they've got to be a wartime leader. And if you look at everything he's done since he took office, I mean, he created this crisis, and it just seems like there's been so many off ramps and he's just blown right by them. And so my fear is that this is really about getting a war for domestic political consumption.

Stephen Bryen (50:13):

If you don't have the ability to have air superiority in warfare, you can't win. And there's no way that the US could have air superiority over Ukraine.

Brandon Weichert (<u>50:23</u>): I agree.

Stephen Bryen (<u>50:24</u>):

It's not possible.

Brandon Weichert (<u>50:25</u>): But I don't know if the people running the show in DC understand that or [inaudible 00:50:29].

Stephen Bryen (<u>50:29</u>):

Well, but I'm sure the guys at the Joint Chiefs will tell them.

Brandon Weichert (<u>50:32</u>): That would be my hope.

Stephen Bryen (<u>50:33</u>): I mean, they're not stupid.

Brandon Weichert (50:34):

But we have reached a very bizarre point where this conversation is having to be had. Will the Joint Chiefs have the ability to rein in the ideological excesses of our leaders? That's a very scary, especially when-

Stephen Bryen (50:46):

Well, I have a lot of confidence that when push comes to shove, the advice they're going to get will be reasonably sound. They're not going to sacrifice themselves to lose because that's just not in their DNA. Biden maybe, but he's-

Brandon Weichert (<u>51:09</u>): That's the thing. He's commander-in-chief.

Stephen Bryen (51:11):

He's an abstraction. I mean, the real thing is the people in the Pentagon have responsibility for 2 million soldiers and for all the infrastructure that goes with it. They're not going to sacrifice that.

Brandon Weichert (51:25):

Bill, if I can just hijack here for a second, I think the real question then is... I think you're right, Stephen. I think the real question is who's running the country then? If Biden is just an abstraction, who's really... Because remember, the Pentagon apparently didn't even tell the White House that Lloyd Austin was going to be out of pocket for that hospitalization. So I mean, who's running the White House? Stephen Bryen (<u>51:48</u>): They didn't see the need.

Brandon Weichert (<u>51:49</u>): Right. Who's running the country?

Stephen Bryen (<u>51:53</u>): You heard what I said. They didn't see the need.

Brandon Weichert (<u>51:57</u>): I got it.

Stephen Bryen (52:00):

But I think that most of our military guys would say that they always follow civilian leadership, but they also give advice. And the advice they would give in this current circumstance is let's not get in a war, we can't win. We're not ready, nothing's prepared. Europe is not even marginally prepared. The US, as you mentioned earlier, has a huge industrial-based problem, a lack of munitions, a lack of equipment, even a lack of troops. So why would you do this? What's the advantage? To save Ukraine? You're not going to save Ukraine.

Brandon Weichert (52:46):

I don't think this has ever been about Ukraine. I think this has been about getting Russia back.

Stephen Bryen (<u>52:51</u>):

No, but I mean there has to be some basis for it. You're going to go and invade Poland? By the way, they're supposed to be our ally. You have to go into Ukraine. What are you going to do that for?

Brandon Weichert (53:03):

Yeah.

Stephen Bryen (53:04):

I don't see any US troops involved. And I think that the administration-

Brandon Weichert (53:08):

Well, covertly, they're already involved. I mean, they're already over there covertly.

Stephen Bryen (53:11):

Well, yeah, if you want to get into how much support we're giving, it's massive. But when I'm talking about soldiers with guns, I don't see it. I mean, I could be wrong. Anything is possible.

Brandon Weichert (53:25):

I have a more pessimistic view only because the people who are running our country, I have no faith in, and I think they are malicious actors. I think that there's something going on that... It doesn't make sense. They should have done a deal a year and a half ago when Kiev was defended. They should have

followed through on the Istanbul Conference. This thing could have been wrapped up. Biden could have declared [inaudible 00:53:50].

Stephen Bryen (53:50):

Well, they scuttled the Istanbul Conference.

Brandon Weichert (53:52):

Right. But what they should have done was Biden could have declared a win. He could have said, "Hey, I got this deal. I saved Ukraine." He could have really looked like a hero. And instead he doubled down and they kept going. And so why would they keep going other than there is some malicious intention here. Maybe it's [inaudible 00:54:12].

Bill Walton (54:12):

So Brandon, I've really got a stage in intervention here. I mean, malicious. I mean, do you think an administration that would leave the border wide open is malicious? Do you think an administration that would try with every molecule to end meritocracy in the country would be malicious? And how about one that wants to destroy our energy sufficiency and take us back to the 12th century? I can't believe you could say they're malicious.

Brandon Weichert (<u>54:40</u>):

Well, that's my point.

Bill Walton (<u>54:41</u>):

They're clearly acting in our long-term interest.

Brandon Weichert (54:44):

That's my point is that they are working against our natural interests. And so maybe the goal is to make America... They used to talk about cutting America down to size. And so maybe the goal is to make us defeated so that we are perennially weak. I don't know, but there's something off about-

Bill Walton (55:11):

And who would call this administration incompetent? They're very good at that. They're very good at that. Stephen, I'm going to give you a last word. We need some adult supervision here.

Stephen Bryen (55:22):

Yeah, I think you do. I try to stay away from ideology and try to deal with what happens on the ground and how does it influence where we're going. And I think, again, if you look at Europe and you look at the situation there now, you look at our abilities, you have to calculate those, I just don't see any benefit, whatever, of prolonging the war in Ukraine. And I think the notion of trying to get regime change in Russia was a fuzzy-headed, stupid idea from the get-go. It should never have been tolerated by any sound thinkers.

(<u>56:07</u>):

And what we need to do is to stabilize the whole place as best we can now, after all the damage that we've helped inflict. And all the deaths. A lot of people have died for this. It's outrageous how many people have died. For what reason? You have to ask that question.

(<u>56:28</u>):

And this notion that Russia's going over on Europe is just a pile of crap. It's just designed to get people worried. Well, what are you going to do about that? Nothing. They're not going to spend any more money or have any more defenses or do anything else. They just want to make noise. So the time is now to try and wrap this thing up and buy some time and then see if we can get more sensible strategic posture for this country.

Bill Walton (56:58):

Well, I think the vote is three-zero in this call for that. That would be, yeah. So Brandon, any last word? We got to wrap up. To be continued, be continued. I'm not going to ask either one of you to make predictions because I don't think it's possible. There are too many moving variables right now.

Brandon Weichert (57:18):

I have been advised professionally to stay away from ideology, but I can't seem to help myself. So I'll keep going. I'll just say that if we don't get November right, if we don't get a change of leadership in this country, it is going to be a nightmare. We will never be the same. We're hanging by a thread here. And I tell people this all the time. I had some problems with Trump at the end there, but ultimately, ultimately, Trump was infinitely better than what we have with Biden. And I will take the mad king over Mr. Magoo any day, any day. And if we can get Trump back in, I think as he said recently, he can get the killing to stop, and that would be great. And then we can become wealthy again. Maybe even relive the 1980s, Bill. I don't know, maybe.

Bill Walton (58:11):

My favorite decade. I was on Wall Street during the decade of greed, and boy was it fun.

Brandon Weichert (58:17):

So those are my closing thoughts. Hope springs eternal.

Bill Walton (58:23):

Okay, well, I guess that'll wrap. That's a wrap for right now. But anyway, to be continued, Stephen Bryen and Brandon Weichert, analysts extraordinaire, thanks for insights, guys, and we'll hope we're all still here without being blown up before our next call together. So anyway, thanks for joining and thanks to all you listening in. Hope you enjoyed this. And as you know, you can find us in all the major podcast platforms. And sign up, subscribe, get your friends to sign up as well if they want to find the conversation that they can't find almost anyplace else on the internet. So anyway, thanks for joining and talk with you again real soon.

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