

Freedom Is Much More Important Than Democracy

September 5, 2026

By J.B. Shurk

Our rights do not come from government.

Democracy invites despotism. When understood as majority rule, democracy means that fifty-one of every hundred citizens can have their way with the other forty-nine.

"But I want to keep my possessions, weapons, and children." Too bad, the majority have decided to redistribute your property to those lazy bums over there, disarm you before you can do anything about it, and indoctrinate your children in public schools, so that they learn to resent you and love the State.

Democracy is dangerous without guardrails. Unless a society has a strong sense of moral virtue that fosters personal discipline, duty, and honor, base selfishness becomes the driving motivation behind all political action. Unless certain constitutional protections exist to safeguard each individual's inviolable rights, democratic majorities devour those rights whenever expedient.

This should surprise no-one. Political philosophers such as Hobbes and Locke described humans' pre-government "state of nature" as a chaotic, violent clash of self-interest. Adam Smith's "invisible hand" regards self-interest as the engine of free markets. Consequently, it is easy to understand why forms of democracy that are unshackled from both moral and constitutional restraints prompt a society to descend back into a state of nature in which humanity's worst impulses are again indulged.

When Western leaders speak adoringly of "our democracy," citizens should prepare to guard their freedoms. *My goodness*, there is nothing inherently virtuous about *democracy*. North Korea's Kim Jong Un runs the most repressive regime on the planet, but his country is known officially as the *Democratic* People's Republic of Korea! China's Xi Jinping is the general secretary of the oppressive Chinese Communist Party, but his nation remains officially the *People's* Republic of China! Dictatorships around the globe claim to govern in the name of the people.

One might think that the blurry line between democracy and despotism would make Western leaders wary of singing democracy's praises. Defenses of majoritarianism embrace the notion that the votes of a hundred people will lead to a more prudent outcome than we could reasonably expect from the decision-making of a single person. But that doesn't make any sense. Would you rather live in a kingdom with a benevolent king or in a democracy filled with rapists, thieves, and murderers? If there is a 50/50 chance that any single dictator is

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good or bad, would there not be a 50/50 chance that a majority of citizens are good or bad, too? If one communist would take everything you have, wouldn't fifty communists do the same thing? Democracy is a coin toss. It is the veneer of legitimacy that makes authoritarianism look shiny and sparkly. That hardly feels like something worth celebrating.

Democracy is just a process. It shouldn't be idolized for its own sake. It can lead to *just* or *unjust* outcomes depending upon the moral virtue, shared culture, and general wisdom of the voters. Aside from these cultural attributes of a society, there is nothing more essential to a nation's long-term peace and happiness than the recognition of and protections for inviolable, natural, God-given rights.

Freedom of speech, freedom of religion, freedom of association, the right to self-defense — these rights and other natural liberties do not come into existence because of majority rule. Our natural rights exist *despite* majority rule. As the Founding Fathers articulated in the Declaration of Independence, "We hold these truths to be self-evident, that all men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty, and the pursuit of Happiness." We aren't equal *because* of democracy; we are equal *despite* any democratic vote that might claim otherwise. Our lives, personal liberties, and connections to God exist because of *His* will, *not* the government's.



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The idea that rights and liberties exist separately from the promulgations of government forms the foundation of our constitutional system and, more generally, of human rights.

The U.S. Constitution spells out quite succinctly what powers each of the three branches of government — Legislative, Executive, and Judicial — shall have. From where do our three branches of government get these powers? The Preamble to the Constitution lays out the source of government power plainly: "We the People of the United States, in Order to form a more perfect Union, establish Justice, insure domestic Tranquility, provide for the common defence, promote the general Welfare, and secure the Blessings of Liberty to ourselves and our Posterity, do ordain and establish this Constitution for the United States of America." In other words, the government's legitimacy comes directly from the people.

Every power that one of the three branches exercises is a power that arises from and is borrowed from the individual citizens of the United States. Any power not specifically delegated to the U.S. government remains with either the individual state governments or individual American citizens. This is profoundly important. The Constitution is not a document that empowers the federal government to do whatever it wants. It is a document that says, "You get to do only these discrete things. Everything else is off-limits!"

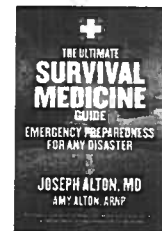
During the Constitutional Convention, there was significant debate among the Founding Fathers about the need for a Bill of Rights explicitly defending the inalienable liberties of American citizens. Since the text of the Constitution clearly limits the delegated powers of each branch of government, some Founders resisted the inclusion of a Bill of Rights because they feared that later generations might incorrectly interpret Americans' inviolable freedoms to include only those rights specifically listed. Other delegates feared that, without a Bill of Rights, later generations might incorrectly reimagine the Constitution's limited delegation of powers to include additional authorities that directly infringe upon Americans' personal rights. Both fears proved prescient.

In order to clearly state their intentions to maximize the size of Americans' personal liberty and to minimize the powers of the federal government, the Founding Fathers gave us the Ninth and Tenth Amendments as part of the Bill of Rights:

Ninth Amendment: "The enumeration in the Constitution, of certain rights, shall not be construed to deny or disparage others retained by the people."

Tenth Amendment: "The powers not delegated to the United States by the Constitution, nor prohibited by it to the States, are reserved to the States respectively, or to the people."

Taken together, these two amendments provide a redundancy within the U.S. Constitution that is meant to preserve human liberty. First, the text of the Constitution restricts the authority of the federal government to a small number of specifically delegated powers. Second, the Bill of Rights repeats the framers' intent to reserve all other powers for the people or their individual state governments.



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With this understanding in mind, a reasonable person should ask: How is it possible that the federal government is now so large and powerful that it encroaches upon nearly every aspect of our private lives? How is it possible that tens of millions of Americans either work directly for government agencies or receive taxpayer dollars in some form? How is it possible that there are too many administrative agencies, committees, and bureaucratic groups for any one person to name? How is it possible that three federal branches with a small number of delegated authorities have been replaced with a growing number of government programs with seemingly unlimited authorities?

The answer to each of these questions is the same: The generations between the Founding Fathers and our own progressively traded freedom for democracy. In the name of the people, lawmakers, presidents, and judges ignored the plain text of the Constitution — including the Ninth and Tenth Amendments of the Bill of Rights — to steal our inalienable rights and liberties.

In order to reject democracy's despotism, the American people will have to demand their rights and liberties back.

The Definition of Insanity

by Ron Paul | Sep 2, 2026 | 0 Comments

Albert Einstein is credited with saying, “the definition of insanity is doing the same thing over and over again and expecting different results.” Whether he actually said it or not, the definition stands.

This definition also very well describes the Trump Administration’s war with Iran. According to media reports, President Trump was cajoled by Israeli Prime Minister Netanyahu that this would be an “easy war,” like Venezuela. Just assassinate the Iranian leadership, he promised, and the regime change would bring in a pro-America regime in Iran.

The CIA disagreed with the assessment, but Trump went with Netanyahu and the rest is history.

The “decapitation strikes” did not change leadership in Iran. As was the case in the US after the 9/11 attacks, the people rallied around the flag. The new leadership was less interested in a compromise than their murdered predecessors.

So the bombing began. Weeks of bombing. But that didn’t work – it only depleted our already-low weapons supplies.

Then “diplomacy” was substituted for bombs and a Memorandum of Understanding was signed by both sides. The US side immediately broke the agreement by attempting to open a new ship corridor by force and the bombs started flying again.

For the past month the bombs stopped only to start up last weekend, with a US strike on an Iranian island. This was followed again by multiple Iranian strikes on US bases in the region.

Bombs then diplomacy, bombs then diplomacy. President Trump has told us dozens of times that us the war is over, and we have won, but no one believes it any longer. He claims that the US completely controls the Strait of Hormuz while the shipping corridors are empty.

The US military has been stretched to the breaking point. US sailors and Marines endured a record-breaking deployment with terrible conditions aboard the USS Abraham Lincoln and other ships at sea. But this past weekend we saw the most telling sign of a military pushing back against orders that make no sense. Army Secretary Dan Driscoll resigned his position, reportedly due to disagreements with Defense Secretary Pete Hegseth over the toll the war is taking on military readiness. Driscoll follows several high-ranking US Army officials who have resigned. It seems clear that US Military leadership does not believe in the mission.

Maybe President Trump should listen to them instead of his “War” Secretary Pete Hegseth?

Doing the same thing and expecting different results may be the definition of insanity, but another definition might be starting a war halfway across the globe against a country that has neither attacked nor threatened you. Insanity might be starting a war based on the self-serving lies of a foreign leader who just happens to benefit from the fighting. Insanity might be further depleting the US arsenal of missiles and other weapons after years of proxy war against Russia through Ukraine. Insanity might be burdening future generations with a national debt of \$40 trillion and climbing.

It is time for some very difficult decisions to be made. This war will not be won with more bombing, and the Iranians no longer trust us as negotiating partners after broken agreements and false claims. The only course of action is to pack up and come home. Let the people of the region solve their own problems.

Global Empire as Domestic Policy

by David S. D'Amato | Sep 4, 2026 | 10 Comments

While many mainstream commentators blanch at the characterization of the United States as an empire, the hard data show that it is today impossible to seriously dispute. The U.S. military operates between 750 and 800 bases around the world, located in around 80 foreign countries and territories. Because there is no fixed or standard definition of “base” for these purposes, there is no accepted number, and some estimates place the figure at closer to 900. The U.S. is also known to operate dozens of secret military bases and black sites, further complicating attempts to settle upon an exact and definitive number.

Just as the number of military bases is disputed, experts have continued longstanding disagreements about how best to tally up total military spending. As the Peter G. Peterson Foundation observed earlier this year, “The United States continues to lead the world in defense spending by a wide margin. In 2025, defense spending by the United States accounted for 33 percent of all military expenditures by countries around the world,” with its nearly trillion-dollar outlay that year exceeding the combined spending of the other six biggest military spenders. This number is down from 2025’s value of nine to six largely because several other countries dramatically increased their military spending (Germany, for example, upped its spending by 24 percent). *Breaking Defense* reports, “The Pentagon is betting big on a \$1.15 trillion discretionary budget request with a further \$350 billion coming from the reconciliation process — together adding up to a historic \$1.5 trillion defense budget.” The Trump administration’s discretionary funding request of \$1.15 trillion marks the first time in history that a discretionary defense request has exceeded \$1 trillion on its own. In the previous budget, for FY 2026, the total number hit the \$1 trillion mark with a combination of \$848 billion in discretionary spending and \$113.3 billion in mandatory reconciliation spending.

The Project on Government Oversight (POGO) notes that many “obvious examples of programs many would consider ‘military spending’” under commonsense definitions are not a part of the Pentagon budget, including spending for veteran benefits, the Coast Guard, and even nuclear weapons. Looking at five different methodologies, a POGO report published in June points out that all five share at least one conclusion: “Military spending in the United States has long been radically underestimated.” (Not unrelated to this slippery accounting is that fact that the Pentagon hasn’t passed an audit in years, failing its eighth in a row at the end of last year.) This recent POGO report finds that “the true total military budget for the last fiscal year (FY 2025) was significantly higher than \$1 trillion: It was likely between \$1.5 trillion and \$1.8 trillion.” If we count interest payments associated with debts for military spending, then “the range is between \$1.7 trillion and \$2.3 trillion.”

We rarely consider the domestic political implications of Washington’s globe-spanning empire, yet government spending on war and empire functions as the de facto national industrial policy of the United States, largely determining which cutting-edge technologies receive the most investment, which companies will enjoy massive state-guaranteed markets, and which physical objects will be the focus of the country’s industrial production capacity. Through the military empire, the state becomes both the architect of and primary consumer for a huge industrial sector. And while it has grabbed more headlines this year due to the parlous speculative bubble surrounding AI, the political consequences of the connection between the global military empire and the private sector tech industry remain woefully under-discussed in the mainstream

discourse. The federal government is funneling billions to AI companies willing to work directly with the military, overpowering objections from employees and the investor market.

Just this week it was reported that “Palantir’s Maven Smart System, an artificial intelligence-powered military platform, is now an official program of record for the Pentagon.” The executive and strategic leadership of major technology companies also increasingly connects and overlaps with the military and national security establishment, often through the Pentagon’s Defense Innovation Unit and liaisons dedicated to recruiting talent and procuring products from the tech sector. As we have already witnessed for decades, cutting-edge technologies developed for the war and empire inevitably end up being deployed domestically against Americans inside the country. Now more than 50 years ago, the Senator Frank Church Committee showed that the intelligence agencies used programs originally designed for foreign surveillance to monitor Americans here at home without warrants. We still have not seriously reckoned with this connection between the policies and technologies of the empire and the ways our own government sees us and governs us.

Since classical antiquity, astute observers have understood that this kind of worldwide military empire is fundamentally incompatible with the rule of law, constitutional government, and even the thinnest definitions of democracy. The administration of such an empire demands secret and centralized forms of decision-making and thus necessarily precludes transparency, accountability, and popular sovereignty. Contemporary political language has managed to disguise what is patently a system of permanent war and empire in the terminology of a liberal and rules-based order of international law and free trade. We have consigned terms like imperialism and colonialism to the history books even as we continue these systems in different forms today. Even the liberal side of our mainstream discourse no longer seriously questions the political system of war and empire that actually governs the country. We will not understand the form of domestic politics we have in the U.S. today until we stop trying to separate it from the imperatives of empire.

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David S. D’Amato is an attorney, businessman, and independent researcher. He is a Policy Advisor to the Future of Freedom Foundation and a regular opinion contributor to The Hill. His writing has appeared in Forbes, Newsweek, Investor’s Business Daily, RealClearPolitics, The Washington Examiner, and many other publications, both popular and scholarly. His work has been cited by the ACLU and Human Rights Watch, among others.

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It goes without saying that any tool or power government acquires for addressing some crisis of the moment will eventually—often, almost immediately—be deployed against the general public.

— J.D. Tuccille

"Surveillance Tools Intended for BorderControl Are
Being Used Against Americans" [2026]

The question is not whether a president is strong enough to exercise power, but whether the president is restrained enough to obey the laws he has sworn to uphold, writes Judge Andrew Napolitano.



A failed war does not end when the drones stop flying. It creates a new danger: A government that refuses to admit defeat and a president who, having failed abroad, seeks muscular victories elsewhere.

The war against Iran is a case study in the limits of military power, the dangers of presidential overreach and the enduring wisdom of the Constitution's separation of powers. It was unauthorized, unconstitutional, illegal, strategically incoherent and — by the standards by which wars must be judged — a geopolitical failure.

The American people were told that force would achieve clear objectives. Iran would be compelled to surrender. Somehow, American security would be enhanced. The region would become more stable.

Instead, the United States expended enormous resources, consumed scarce munitions, deepened regional instability and failed to produce the political outcome President Donald Trump promised. Senior military officials just last week warned him that extending large-scale operations risked exhausting critical military capabilities and weakening America's ability to respond elsewhere.

The United States can destroy buildings, eliminate targets, deploy aircraft, ships, missiles, drones and troops anywhere on the planet. But war is not a video game in which the destruction of enemy assets automatically produces political surrender. War is a contest of wills, societies, culture and endurance.

And here is the constitutional question that should have been asked before the first bomb was dropped: Who gave the president the authority to begin this war? The Constitution did not.

Article I, Section 8 gives Congress — not the president — the power to declare war. The framers deliberately rejected the British model in which kings could drag nations into conflicts based upon personal judgment, ambition or political convenience. James Madison warned that the executive branch was “the branch of power most interested in war,” and therefore the Constitution placed the decision to enter war outside the president's constitutional reach.

The president is commander in chief. He commands forces after lawful congressional decisions have been made. He does not possess the power to transform his title into a personal authority to begin wars.

That principle has been repeatedly recognized by the Supreme Court. In cases such as *Youngstown Sheet & Tube Co. v. Sawyer*, the Court rejected the idea that President Harry Truman had unlimited power simply because he claimed national security. Justice Robert Jackson's famous concurrence warned that executive power is most dangerous when it operates in a “zone of twilight” where presidents attempt to expand authority beyond constitutional boundaries and without congressional concurrence.

The Iran war belongs precisely in that twilight — where executive ambition collides with constitutional restraint.

The administration may argue that modern threats require flexibility. That argument has been

made by presidents of both parties for decades. But flexibility is not the same as unlimited authority. The Constitution was written for difficult moments, not easy ones. It was designed to restrain presidents even when they believe they have compelling reasons to act.

The military failure abroad has created a political dilemma at home. A president who promised victory must now confront the reality that victory was never achieved.

The danger is what happens next.

History teaches that political leaders who suffer public humiliation abroad often seek demonstrations of strength elsewhere. Foreign-policy failure can produce domestic overreach. Leaders who cannot achieve the desired result overseas may attempt to prove their power through actions at home.

That is where the war comes home.

The president, frustrated by military limitations, may turn toward radical immigration enforcement, Supreme Court-prohibited tariffs, statutorily prohibited domestic deployments of military forces, stealing foreign-owned oil and assertions of executive authority that collide with free speech and free association.

But the Constitution does not permit a president to substitute disappointment for law.

The Fifth Amendment guarantees that no person — not just Americans — shall be deprived of life, liberty or property without due process of law. The Sixth Amendment guarantees all persons — not just Americans — from whom the government seeks life, liberty or property the right to a public trial before an impartial jury and other constitutional protections. These protections apply not because accused persons are necessarily innocent but because government power is too dangerous to operate without restraints.

Evidence is not conviction. Accusation is not guilt. Presidential assertion is not judicial judgment.

The executive branch cannot simply identify alleged criminals in speedboats or elsewhere, declare them enemies and impose punishment without trial. That is a system the American Revolution rejected.

The same principle applies to the use of military force inside the United States. The founders were deeply suspicious of standing armies being used for law enforcement. That suspicion produced constitutional protections and later statutes prohibiting the military's role in civilian law enforcement.

The military exists to defend the nation from foreign threats. It is not a presidential police force.

Likewise, Congress — not the president — defines crimes and establishes punishments. A president cannot create new categories of enemies and decide their fate by executive command. The Constitution does not authorize a monarchy with aircraft carriers.

Every generation faces a temptation to exchange freedom for security. Every generation is told that normal rules cannot apply because a crisis is too serious, an enemy too dangerous and a moment too urgent.

The founders knew that argument well and they rejected it.

The Constitution was written precisely because government officials would sometimes believe that their objectives justified employing extraordinary power. The separation of powers, congressional war authority, judicial review and due process protections are not obstacles to effective government. They are safeguards against government becoming the threat it was created to prevent.

The ultimate question is not whether a president is strong enough to exercise power. The question is whether the president is restrained enough to obey the laws he has sworn to uphold.

That is the fear of a republic when the war comes home. To paraphrase the author Herman Melville, beware the president weeping when he bares an iron hand.

Rights Groups: Israeli Deliberate Killing of Journalist Likely a War Crime

Israeli drones attacked reporters then prevented ambulances from reaching them

by Jason Ditz | August 6, 2026 at 2:03 pm ET | Israel, Lebanon, war crimes

Multiple human rights groups, including Amnesty International and Human Rights Watch, issued statements today related to the April 22 killing of Lebanese journalist Amal Khalil by Israeli forces, concluding that **her killing was almost certainly a war crime** and should be investigated as such.

Amal Khalil, a journalist for the newspaper Al-Akhbar, and photojournalist Zainab Faraj **were targeted in the village of al-Tiri on April 22** when they were attempting to cover an Israeli airstrike earlier in the day. They were attacked by an Israeli drone, wound and chased by that drone into a building, and the drones then preventing ambulances from reaching them. By the time rescuers were able to access the building, Khalil was dead and Faraj was in critical condition.

The two were trapped for hours, with **drones dropping stun grenades on Red Cross workers, and opening fire on ambulances** that got too close to the building. Human Rights Watch concluded that the evidence was Israel knew full well the two were civilians and attacked them anyways.



Funeral for Lebanese journalist Amal Khalil | STR via Reuters Connect

Welcome Home Stalin

by Eric Margolis | Aug 27, 2026 | News | 5 Comments

I've been all over the world and have seen both its good and sordid countries. One of the best run, most decent and honest nations I've seen is Canada.

As George Bernard Shaw noted, Canada is a wonderful country, but it has nine months of winter and three months of fall. It has vast forests, beautiful lakes, lots of beautiful animals and birds, lavish natural resources, and people, as I've found, who are the kindest, most honest and thoughtful in the world.

As an American, I have always regarded Canada as the best neighbor any country could have, a treasure house of nature, clean water and fresh air. Canadians also proved themselves formidable soldiers in three wars (including the distant Boer War) and commendable peace-seekers. Canada is a country in which you can cross the street with your eyes closed and survive. Where bribery is little known, and where people – as I found – are taught to respect one another, their differences, and their various cultures and religions.

As a result, I have been horrified and shamed by the boorish, aggressive attitude of the Trump administration toward good neighbor Canada – claiming it's the '51st state' and a colony. Canada's fault was being under Great Britain's thumb for far too long and accepting secondary social status.

The Trump administration is behaving in a similar manner to Russia's dictator, Josef Stalin. Staging invasions of small countries; purging and terrorizing officials, curbing free speech and trying to monopolize culture. In this process, the current US regime has made itself the most hated government in the world. Most Americans used to be proud of their government. Not so anymore.

We wonder if the Trump regime really intends to invade Canada, Greenland, Cuba or even the Persian Gulf. Who knows what transpires in the confused mind of an 80-year-old man who is angry at the world for not kissing his feet and who idealizes Israel – who has so far killed around 78,000 Palestinians and many Lebanese. This is not self-defense. It's Biblical fury. The wars in Iran, Gaza and Lebanon are an effort by a failing president to distract public attention from the Epstein scandals in which he was likely involved, and a desperate attempt to whip up primitive nationalism and war fever prior to this fall's elections.

Meanwhile, the Trump regime deploys every effort to stifle free speech, curb the media and silence critics. Stalin could have been proud. We await the arrival of the American KGB on the scene.

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Eric S. Margolis is an award-winning, internationally syndicated columnist. His articles have appeared in the New York Times, the International Herald Tribune, the Los Angeles Times, Times of London, the Gulf Times, the Khaleej Times, Nation (Pakistan), Hurriyet (Turkey), Sun Times (Malaysia), and other news sites in Asia. He writes at EricMargolis.com.

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Reopening Is Not Restarting: Why Gulf Oil Won't Come Back When the Strait Does

LARRY C. JOHNSON • SEPTEMBER 4, 2026

Karl Miller is out with another report on the state of the oil production infrastructure in the Persian Gulf and, as always, it is a must read. Unfortunately, it is behind a firewall but he has given me permission to summarize his findings and share them with you. So here goes.

There is a comforting assumption buried in nearly every oil forecast on the market right now: that the day the Strait of Hormuz reopens, the Persian Gulf's missing barrels come flooding back, prices normalize, and the shock is over. A detailed engineering-and-financial model of the restart says that assumption is not merely optimistic — it is wrong by years and by trillions of dollars. The day safe passage returns is not the end of the disruption. It is Day 0 of a five-year industrial rebuild.

The market is starting from the wrong number

The first error is the baseline. Analysts leaned on a roughly 8.3 mb/d loss figure that captured a temporary rebound in Gulf production, not the full loss of marketable liquids. Corrected, the model begins with the prewar Hormuz system moving 20 mb/d of crude, condensate, products, and LPG, against barely 1.5 mb/d still trickling out today — and it separates two numbers the market keeps conflating.

The first is an **18.5 mb/d exportable-supply deficit** — the market-facing shortfall, the prewar flow no longer reaching buyers. The second is a **13.5 mb/d upstream outage** — the production capacity actually shut in. The five-million-barrel gap between them is the tell: it is not oil waiting in the ground, it is oil that cannot move because the processing plants, storage tanks, pipelines, terminals, and loading berths between the wellhead and the tanker are damaged or offline. Reopening the strait addresses none of it.

The damage begins at the wellhead

Let me explain why a shut-in is not a pause but is physical. When wells sit dead for months, static fluids separate, reservoir pressure redistributes, and scale, wax, asphaltenes, and emulsions form in the tubing and the rock itself. In the Gulf's sour fields, hydrogen-sulfide fluids attack tubing, casing, valves, and downhole safety equipment the moment corrosion control and surveillance stop. Injectors that were stopped abruptly backflow and sand up; mature waterfloods lose the pressure balance that sweeps oil toward producers; and artificial-lift wells accumulate their own failure stack — burned-out electric submersible pumps, seized equipment, gas-locked and failed gas-lift valves waiting on long-lead replacement parts.

The consequence is that the first flow test proves only that a well *can* flow. It does not prove thirty-day stability, reservoir balance, export-quality output, or repeatable deliverability. Counting a one-day test rate as restored capacity is exactly the mistake the model is built to prevent.

Every barrel must clear five gates

Even a healthy well produces nothing marketable until it clears a chain of serial gates: **mechanical** (barriers, tubing, tree, and safety systems pass), **reservoir** (pressure, water cut, gas, and sand stabilize), **process** (separation, compression, sulfur removal, power, and metering are available), **product** (crude or gas is on-specification with storage to receive it), and **export** (pipeline, berth, loading arm, tanker, crew, pilot, insurance, and payment all function). A single failed gate strands everything behind it. Open a well before the next gate is ready and you create no supply — and may force another shut-in.

This is why the schedule is governed by shared systems, not well counts. One unavailable node — an injection header, a gas-oil separation plant, a compressor, a power substation, a sulfur train, a tank farm, a single loading arm — can neutralize hundreds of otherwise-intact wells. A well-by-well repair tally dramatically understates the timeline, because the bottlenecks are the systems every well depends on. An open shipping channel, the model notes pointedly, does not prove a loadable berth.

The timeline, and the money

Put the engineering into a curve and the loss is heavily front-loaded, because the largest volume is missing precisely while the industrial machine to fix it is still being assembled. In the central case, one year after reopening, 11.8 mb/d of exportable supply and 9.5 mb/d of upstream capacity are *still* offline. Year 1 alone removes 5.42 billion barrels from the market.

Period	Avg. offline	Lost supply	Gross value @ \$90
Year 1	14.85 mb/d	5.42 bn bbl	\$487.7 bn
Year 2	9.70 mb/d	3.54 bn bbl	\$318.6 bn
Year 3	6.00 mb/d	2.19 bn bbl	\$197.1 bn
Year 4	3.30 mb/d	1.20 bn bbl	\$108.4 bn
Year 5	1.50 mb/d	0.55 bn bbl	\$49.3 bn

The central case loses **12.9 billion barrels** of exportable supply over five years — about **\$1.16 trillion** in gross sales at \$90 — and requires a restart-funding envelope of **\$380–870 billion**. Two worse cases are not tail risks so much as plausible variants: a “constrained” case (scarce rigs, financing friction, marine disruption) loses 17.5 billion barrels and \$1.57 trillion, and a “structural damage” case loses 21.97 billion barrels and \$1.98 trillion — and is still 6.0 mb/d short at the end of Year 5, when the central case has nearly closed.

Who is short, and by how much

The 13.5 mb/d upstream outage is not evenly spread, and the Year-1 residual shows why a headline “4 mb/d still down” figure would badly understate the wellhead problem — the real Year-1 residual is 9.5 mb/d.

System	Opening-day outage	Still down at Year 1	The long pole
Saudi Arabia	4.0 mb/d	2.8 mb/d	Mature waterfloods, injection, offshore, sour service, shared GOSPs
Iraq	3.0 mb/d	2.3 mb/d	Power, water injection, integrity backlog, storage/terminals
Kuwait	2.0 mb/d	1.5 mb/d	Mature reservoirs, high workover intensity, injectors, gathering
UAE	1.4 mb/d	0.9 mb/d	Bab/Bu Hasa pressure support, offshore complexes, artificial islands
Qatar	1.3 mb/d	1.0 mb/d	Sour gas, compression, sulfur, LNG/GTL trains, loading
Iran	1.0 mb/d	0.4 mb/d	Storage saturation, sanctions, vessel access
Bahrain / Neutral Zone	0.8 mb/d	0.6 mb/d	Aging lift, shared processing, single-point concentration
Total	13.5 mb/d	9.5 mb/d	

The two constraints money can’t buy through

Even fully funded, the rebuild runs into two hard limits. The first is working capital, and its timing is brutal: restart cash leaves before production cash returns. Deposits and procurement come before mobilization, mobilization before intervention, intervention before stable output, stable output before an on-spec cargo, and the cargo before anyone collects a dollar. A region whose operators need spendable cash *now* — for payroll, security, chemicals, spares, war-risk insurance — is asked to spend for a year or more before revenue recovers, which is why the model calls for a purpose-built financing stack: super-priority restart revolvers, hard-currency procurement lines, contractor-mobilization facilities, and export-receivable bridges.

The second limit is industrial capacity, and money cannot conjure it. Certified crews, drilling and workover rigs, offshore vessels, ROV and diving spreads, OEM field service, and long-lead sour-service components — tubulars, downhole safety valves, ESPs, compressors — cannot be summoned on demand, least of all when the entire Gulf is bidding for the same scarce equipment at once. The five-year curve is an industrial-capacity curve as much as a reservoir curve.

The bottom line for the market

The single most important sentence in the analysis is its warning to forecasters: any supply model that snaps Gulf barrels back the moment the strait reopens overstates prompt supply, understates the cumulative loss, and ignores the capital and industrial capacity needed to rebuild the well-to-tanker chain. The correct discipline is to count wells only after mechanical and reservoir stability, fields only after shared processing is stable, product only after specification and storage, and exports only after *repeated* insured liftings — one vessel movement is not a corridor.

For anyone trying to understand why the diesel and crude squeeze of the past months will not simply evaporate with a ceasefire, this is the answer. The tightness in the middle-distillate and crude markets is not a headline that clears when the shooting stops and the shipping lanes open. It is the leading edge of a multi-year structural shortfall, front-loaded into the next twelve to twenty-four months, and priced accordingly. Reopening the strait ends the blockade. It does not restart the Gulf.

A fascinating conversation with Joe Kent. We come from different eras but have shared similar experiences:

Ok. I'm on my way to Russia and only could spare 30 minutes with Nima:

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The Largest Labor Uprising Ends

SEPTEMBER 4, 1921

TODAY  HISTORY

In the summer of 1921, thousands of armed coal miners set out across southern West Virginia. Their destination? Mingo county, where miners had been jailed during a bitter struggle over unionization. But standing in their way was Blair Mountain—and an anti-union sheriff, backed by an armed force determined to stop them.

For years miners had fought for better pay, safer working conditions, and the right to organize. Many lived in company towns, where coal operators owned their homes and stores and ultimately exerted enormous control over their daily lives. Attempts to unionize could mean losing their jobs or their homes, and resistance from coal companies and their hired guards repeatedly erupted into violence.

By 1921 the fight over unionization had become especially bitter in Mingo county. Striking miners faced evictions and arrests, and violence between miners and forces aligned with the coal companies had intensified, leaving several dead. With miners jailed and tensions mounting, in late August, thousands of miners began marching toward Mingo county hoping to free their jailed fellow miners—and challenge the anti-union system that had taken hold.

As the marchers approached Blair Mountain, Logan county Sheriff Don Chafin assembled a civilian force along the ridgeline. On August 31 an encounter between miners and Chafin's deputies resulted in gunfire, and the Battle of Blair Mountain began.

For the next several days, the mountains of West Virginia echoed with gunfire as Blair Mountain became a battlefield. Opposing forces traded fire with rifles and machine guns. Chafin's side even employed airplanes to drop gas and homemade explosives on the miners.

The fighting ceased when Pres. Warren G. Harding sent more than 2,000 federal troops to West Virginia. Many of the miners were World War I veterans, and while they had been willing to take up arms against local authorities and coal interests, they would not fight the U.S. Army. They laid down their weapons and headed home.

On September 4, the largest armed labor uprising in U.S. history came to an end. But the miners had not won the changes they sought, and the struggle for union rights, better working conditions, and greater protections would continue.

Can a Nation Be Irrevocably Ruined by Its Leaders?

August 29, 2026

By John Leake

Reflections on how quickly a nation may fall from grace.

Oh Deutschland, bleiche Mutter!
Wie haben deine Söhne dich zugerichtet
Dass du unter den Völkern sitztest
Ein Gespött oder eine Furcht!

Oh Germany, pale mother!
How have your sons ill-served you
That you are scorned by all people—
A thing of obloquy and terror!

Bertolt Brecht, "Deutschland"

In William Faulkner's story *The Bear*, the protagonist, Isaac McCaslin goes on a series of hunting expeditions to kill a bear named Old Ben. However, when he finally gets a chance to take a shot, he chooses to let the splendid animal—that seems to embody what's left of the disappearing Mississippi wilderness—live. Later he watches in horror as another hunter brutally slays the old creature with a knife.

The Focal Points

The story seems to be a meditation on how men may be given to greed, lust, and the desire to dominate and kill, thereby losing their souls. Especially disturbing is Isaac's perception that, from the actions of the men who settled it, including his own family, his homeland of Mississippi has been irredeemably tainted.

Bertolt Brecht conveyed a similar idea in his poem "Deutschland" that expresses the idea that the once great nation of Germany—personified by a "pale mother"—will never recover from the dishonor inflicted upon her by the dreadful conduct of her sons.

There was a time not that long ago in the United States when our society still valued the concept of a **gentleman**—an idea that traced its lineage back to classical Greece. The Greek stoic philosopher Epictetus remarked that even a relatively minor form of misconduct is enough to ruin a man's reputation forever. As he put it:

A small thing may ruin and destroy all. There is no need of anything large to ruin us; to lose your self-respect, your integrity, your modesty, a single moment of intemperance or carelessness is enough.

Increasingly, it seems to me that the people who own and run the United States possess the character traits that Isaac McCaslin perceived to have resulted in a fall from grace. They are conspicuously—even bombastically—greedy, rapacious, bloodthirsty, vulgar and seem to have no regard for the other peoples of the world or for even the younger generations of their own country.

Has this coterie of awful people rendered America into "a thing of obloquy and terror"?

The same question may be asked of Israel. In retaliation for approximately 4,000 Hamas assassins brutally killing about 828 Israeli civilians and 367 security personnel, Israel's military has damaged or completely destroyed an estimated 82% of all buildings in Gaza and killed (according to a study *Lancet Global Health study*) around 75,000 people and injured around 174,000. According to this study, women, children, and older people made up a majority of violent deaths.



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Just as the atrocious behavior of the German government (and people who played along with it) in the years 1933-1945 did irreparable harm to the reputation of ALL German people—including those not yet born—the reputation of the American and Israeli nations will likely be permanently damaged by the conduct of their current governments.

We can try to defend the actions of our dreadful politicians till we are blue in the face, but it won't change the factual reality that the rest of the world can plainly see, even if we are too willfully blind to see it ourselves.



RESPONSIBLE STATECRAFT

No War? 377 US Forces Injured Since July, 36 In Last 2 Weeks

This brings the total to 794 mostly Army wounded as Iran lashes out at American installations in the Middle East

KELLEY BEAUCAR VLAHOS

SEP 05, 2026

According to new data quietly added to the Pentagon's casualty base, there were 36 new injuries in the last two weeks, mostly Army, as fighting renewed between the United States and Iran in the Persian Gulf. This brings the total wounded count to 794 and 18 killed since the war began on Feb. 28.

The White House, including Vice President JD Vance just this week, likes to say this isn't "a war" but an "operation" but for the soldiers, sailors, and airmen who have been killed and injured, these semantics are meaningless. Just like the Pentagon's insistence that casualties that occurred before the July "ceasefire" must be classified under "Operation Epic Fury" and those after under "Overseas Operations." This is distinction without a difference.

Turns out the number of servicemen hurt in the latter — 377, with four dead — is almost as much as the former. In the pre-July period, there were 417 men and women injured and seven killed.

It is a grave insult to those who serve, and to the American people who support them, for politicians to downplay what is clearly a war in order to try and avoid the political cost and implications. Iran had been targeting U.S. facilities in Bahrain, Jordan, Iraq, and Kuwait in retaliatory strikes over the last week. The fact the Pentagon is not saying where, when, or how these men and women were wounded is a pathetic attempt to deter reality and ultimately it will backfire.

Is America preparing a tactical nuke for Iran?

Trump's losing the Iran war – and now the nuclear option is being normalized.

The escalation trap is getting worse for Trump and his cabal of sycophants, as what was once a discussion which was linked to existentialism – the nuclear option – is now being dialled down to any kind of military option. Just a bigger bomb. The more Trump loses, the more Iran hits U.S. assets and allies in the Middle East, the longer the straits remain closed, and the higher gasoline and diesel costs reach in the U.S. – the more the idea of a 'tactical' nuke dropped on Iran becomes normal and even preferred.

But Trump is also getting madder. He is literally losing his mind, and his condition has worsened in his second term in office to the point where he is losing touch with any kind of reality. Before February 28th, the U.S. economy was not in bad shape. A lot of fundamentals were holding out. But now everything is spiralling out of control, and quite apart from blue-collar workers being hit with gas pump prices being well above \$4, now diesel is being hiked – which only means that the cost of food, among other goods, is going to rise significantly, as trucking firms pass on the bill to producers, who pass it on to the consumer.

And as things start to get out of control, take a cursory glance at who is running Trump and who stands to gain if a nuclear bomb were used. It's the same people who walked away from 9/11 laughing until their sides hurt. Israel. The Zionists are now pushing for the tactical strike option, as any escalation in the region – no matter who gets killed or whose country gets wiped out even of water – is not their worry or concern. These days, Netanyahu's coterie can argue even more that Iran is probably making a nuclear bomb, as the one institution that Trump could turn to – the IAEA – can't enter Iran and do its inspections. And so the default conclusion is that the U.S. president is going to be bullied again into making a cataclysmic error of judgment in hitting Iran.

The Zionists have been busy on both sides of the Atlantic. In the UK, it's hard not to see how their money is now reaching Nigel Farage's far-right party, which has just been hit by another dodgy funding scandal – presenting the leader of the party as bereft of any political morals of any creed in preference for filling his pockets with dirty cash. The Zionists control UK media, and it's interesting to see how Farage gets a pretty easy time despite the graft scandals burying him. In the U.S., it's a similar story. For a while now, J.D. Vance has been quite critical of how Zionists are shaping U.S. politics both internationally and even domestically, and has always been quite vague about how the U.S. should move forward in Iran. But now those who have crossed a threshold and are in the pockets of Israel's lobby are going for him.

Former South Carolina Gov. Nikki Haley recently accused him of not taking a clear stance on Israel – slamming him for trying to “be both.”

“Right is right. Wrong is wrong. In life, you must choose a side. You are either with the Tucker Carlson wing of the country or you are with the pro-Israel wing of the country,” she wrote on social media. “You can't be both.”

Haley, a former GOP presidential candidate who isn't overburdened with a high IQ, couldn't even hide who was directing her and even giving her reference material to attack Vance – leading some to wonder if Israel's lobby just writes her social media posts.

She continued her post with a quote from Nobel Prize-winning writer and Holocaust survivor Elie Wiesel, who said in his 1986 acceptance speech: “We must always take sides. Neutrality helps the oppressor, never the victim.”

Meanwhile, America's trust around the world seems to have been eroded to almost nothing. Recently, the Netherlands just pulled out its gold reserves it used to keep in the U.S. The move followed Germany a few weeks ago, which did the same. EU leaders just don't trust Trump and can see the de-dollarisation trend gaining ground while U.S. debt continues to mount. Trump can't do anything, of course, as his immature ideas about governance have produced a series of policies which haven't served the country's interests but merely backfired – reminding many that he doesn't have one or two failed businesses under his belt like many successful entrepreneurs, but scores, which would suggest that he doesn't really understand business at all. A nuke, he might believe, would be a reset in the Middle East and perhaps a huge distraction away from terrible numbers back home. But the precedent it would set to Russia and China would only make Iran an even greater winner than it already is in the region. Trump simply has no idea what he is doing – and all the people who could advise him have been fired.

'Lawless Killing Spree at Sea Resumes' as US Announces Fresh Boat Bombings

With the latest two casualties, the Trump administration's boat bombing spree has now claimed the lives of at least 223 people.

By BRAD REED | Aug 24, 2026

The US military has resumed its campaign of bombing alleged drug-trafficking vessels after a two-month pause in a campaign that many legal experts and human rights groups believe constitutes a murder spree.

In a Monday social media post, US Southern Command (SOUTHCOM) said it carried out a "lethal kinetic strike on a low-profile vessel operating along established narco-trafficking routes" in the Pacific Ocean on Sunday. Two people were killed as a result of the attack, SOUTHCOM claimed.

In announcing the strike, SOUTHCOM Commander Gen. Francis Donovan said the attack was part of a campaign of "imposing total systemic friction on narco-terrorists—disrupting their operations, dismantling their leadership, and eliminating cartel terror across the region."

Donovan's boasts about the effectiveness of the boat strikes in combating the drug trade come less than a month after a leaked a Drug Enforcement Administration (DEA) analysis revealed that the boat-bombing campaign has not "reduced the amount of cocaine entering" the country, as drug cartels have found alternate methods for shipping their product into the US.

With the latest two casualties, the boat bombing campaign launched nearly a year ago by President Donald Trump's administration has now claimed the lives of at least 223 people.

Adam Isaacson, director of the Defense Oversight program at the Washington Office on Latin America (WOLA), criticized the administration for resuming its boat bombings despite "overwhelming evidence that they are murder; that many, likely most, of the dead are either super-low-level or uninvolved with drugs; and that cocaine supply is unaffected."

Brian Finucane, senior adviser to the US Program at the International Crisis Group, delivered a similarly scathing assessment, commenting that "the Trump administration's lawless killing spree at sea resumes."

Nicholas Grossman, professor of international relations at the University of Illinois, described the boat strike campaign as "murderous" and "illegal," adding that its victims are "not terrorists" and "may not even be drug traffickers."

Investigative journalist Camila Lourdes Galarza observed that "there's still no proof any of the victims" of the boat strikes were involved in the drug trade.

Lourdes Galarza sarcastically added that if the victims had been drug traffickers, "the US would probably give them a deal" like the one given to Juan Orlando Hernández, the former president of Honduras who was pardoned by Trump last year despite being previously convicted on narcotics trafficking charges.