

Daniel Davis: U.S. Miscalculation - War Not Going as Planned

Lt. Col. Daniel Davis is a 4x combat veteran, the recipient of the Ridenhour Prize for Truth-Telling, and is the host of the Daniel Davis Deep Dive YouTube channel. After the second day of the war, Lt. Col. Davis discusses why the war against Iran is not going as planned and Iran has too many advantages. Daniel Davis Deep Dive: <https://www.youtube.com/@DanielDavisDeepDive/videos> Follow Prof. Glenn Diesen: Substack: <https://glennDiesen.substack.com/> X/Twitter: https://x.com/Glenn_Diesen Patreon: <https://www.patreon.com/glennDiesen> Support the research by Prof. Glenn Diesen: PayPal: <https://www.paypal.com/paypalme/glennDiesen> Buy me a Coffee: [buymeacoffee.com/gdieseng](https://www.buymeacoffee.com/gdieseng) Go Fund Me: <https://gofund.me/09ea012f> Books by Prof. Glenn Diesen: <https://www.amazon.com/stores/author/B09FPQ4MDL>

#Glenn

Welcome back. We are joined by Lieutenant Colonel Daniel Davis, a four-time combat veteran and host of the very popular *Daniel Davis Deep Dive* YouTube show. I'll leave a link in the description. Thank you for coming back on—we appreciate it. We only spoke a few days ago, and you were warning that this war was coming. Sadly, you were right, as usual. Now that the war has been going on for two days, it doesn't seem to be going as planned. I mean, all sides have to put on a brave face, I guess, and claim success in any war. But over the past two days, we've seen a lot of chaos, and it's hard to suggest that this was intended. Do you see any strategic miscalculation on the part of the United States, or was this a cost they were prepared to absorb?

#Daniel Davis

It is a major miscalculation, but unfortunately, it was one that was self-evident before it ever started. All the signs were in place. You mentioned that I saw this coming and called it. It frankly wasn't that hard for me, because the signs we were given made it really clear that, absent an eleventh-hour change of mind by Trump—which was always possible—I always left some room for that. But based on the movement of military equipment and gear, the statements that were made, and where the forces were, it looked to me—because I've been through this, I've lived it once, well, twice really, as a member of the armed forces watching this exact same kind of buildup.

In the United States—and one of the reasons I was so confident in calling the Russian war when it broke out in 2022—was because, remember, most people thought, "Oh, it's just going to be another buildup. The Russians aren't really going to do that; they're just posturing." But I said, no, this one is fundamentally different, for the same reason as the other two that I saw. And now that's exactly how it played out. When you looked at the type of force Russia had amassed, it wasn't just

demonstration forces. They had everything they needed, with all the enablers—the logistics, the medical support, all the things required to sustain combat operations. Everything was being moved forward, just like what I went through myself when I was part of a deploying force.

And so I said, no, this is something that's being prepositioned to use. And I wrote about that extensively before the case. So, you know, you couldn't come back and just say, "Well, you called it later." That's why I was so confident on this one—for the same reasons. It was the air logistics, the refueling capabilities, the C-17s, the C-5 transports—the massive number of them, like 50 percent of our entire inventory. And then, of course, the large number of fighter jets, the aircraft carrier strike groups, all of that. When you look at all that, it's like, no, this is being designed for use. This isn't pressure; this isn't trying to convince anybody to reach an outcome, because they already were. That was kind of the linchpin for me—the thing that convinced me Iran was already willing to have a negotiation.

And in fact, I think history is going to look back and say that if there was a central moment when our failure was foreshadowed, it was the night before—when the foreign minister from Oman, I believe it was a Friday night, came on U.S. CBS News and said he had agreed with the Iranian negotiator to make some profound submissions, changes, and concessions they wanted in the nuclear agreement. They said they would do no reprocessing—zero—which they had said wasn't even on the table before. Then they said they would get rid of their stockpiles too. And they said that at least on the table were the long-range missiles and the proxy forces, which before hadn't even been discussed. They said, "We'll do that later, but let's get the nuclear part first." It was a golden opportunity for the Trump administration. If that's what they wanted, they had it in their hand.

And when he attacked the next morning, that made it very clear that none of this was ever about negotiations—it was always about war. Well, now we're in a situation where we've started something we can't finish. And I don't remember, maybe it's what you and I talked about last time, but my big frustration was that this is a war you can't win. You're setting unattainable military objectives. And when President Trump came out early that Saturday morning at Mar-a-Lago, he laid out all the objectives for this, and I was just cringing, because I thought, unless the Iranian side does the unexpected and just collapses and crumbles out of fear or whatever, this isn't going to work.

There's no way you're going to be able to accomplish this if their backbone stays stiff. They already understood ahead of time that this was going to be very costly for them, but they had calculated—this was in the New York Times just days before—that fighting a war with the U.S. was less risky than submitting to the U.S. That, again, was another signal that they had made the decision to go. And so far, that's exactly what they've done. They are paying a price, and there's no doubt there's been profound destruction of their armed forces, their senior leaders—both political and military—and their military infrastructure has definitely taken a beating.

I'm pretty sure you and I did talk about this. They have these underground facilities throughout the country, and they can withstand a lot of this for an extended period of time. But we can't—that's the key issue here. I said we had maybe four or five days of high-intensity flight, maybe we could stretch that out to a couple of weeks if you're judicious in the use. But then what? If the other side doesn't capitulate, you're in real trouble. And now that's where it looks like we are. There are reports out just in the last few hours that President Trump is saying, "Hey, maybe we can have a ceasefire. They're asking me for it," which has got to be complete BS. There's no way they would ask for it.

Not now. Not after their Ayatollah has been assassinated. The last thing they're going to do is agree to a ceasefire under those conditions. Otherwise, he would have been taken to a secure location. Evidence suggests he knew he was going to be assassinated, and I think he willingly sacrificed his life to be used as a martyr because he didn't go to a protected place. He stayed where everyone knew his compound was, so when the strike came in, he was killed. That's what it looks like happened—intentionally. And now that result seems to be not causing the backbone to quiver, but actually consolidating support behind the regime, as has happened throughout history.

The Shia world—there are lots of protests going on around the world in support of the Iranian side because of the sacrifice of the Ayatollah. So I think it's been a profound—well, I mean, to call it a miscalculation almost sounds too mild, because that implies you thought maybe it was going to be good. But, you know, based on what you thought would happen, you figured it was going to work, and it didn't. This was well known ahead of time—that unless the other side just quit, which everyone said they wouldn't, and you went ahead anyway—that was a profound error. So yeah, I think it's a major miscalculation.

#Glenn

Well, they didn't seem to predict that Iran would attack bases across the region—Qatar, the United Arab Emirates, Bahrain, Oman, Kuwait, Iraq, Jordan, Saudi Arabia, and obviously Israel. But also, as you said, killing Khamenei—it's very strange that they thought the government would collapse. In Shia culture, martyrdom runs so deep. This is something that would, as you said, either get them riled up or consolidate them. And across the Shia world—Shia communities from Iraq, Pakistan, Bahrain—they're all taking to the streets in support of Iran, given this attack and the killing of their religious leader. I saw Trump giving a speech where he argued that the Iranian army should put their weapons down and civilians should take to the streets. Does he really think that's what's going to happen now?

#Daniel Davis

I really do. I think he actually believes that. In his mind—you know how people often project? Whatever your values are, whatever you would do in a situation, you just project that onto another actor. And I think that's what he did, because he's thinking, "Yeah, if I were in that position and

someone stronger came in and started bombing the crap out of me and killing people, I'd give up. I'd just say, 'Yeah, let's roll in.' So that's what's going to happen." And then he's like, "That's kind of what happened with all those speedboats. I killed all these people and blew things up—nobody did anything. I took the leader from another country, in Venezuela—nothing happened. They just rolled over, the whole leadership in Venezuela. All you have to do is show how tough you are, and they'll just roll over." And I think that's what he thought would happen here, not recognizing the radical and profound differences between Venezuela and the Shia country of Iran, as you pointed out.

So I think it was a big miscalculation. I will say the one area where I didn't foresee things properly was this: Iran had said they would attack the bases of all the countries where America was present in the region. We took that seriously and strengthened a lot of the air defenses. But I didn't think they would, from the very beginning, also attack the civilian sectors of those countries. It appears to me that their message was, "Hey, you guys, we've been suffering from the U.S.—since 2010 from Israel, and then starting with the assassination of Soleimani by the U.S. in 2019. We've just been hit mercilessly. And you're protecting them. You're putting these bases there, and they're using them against us. So it's time for you to feel some pain too."

It looks like that's kind of what they said—kind of like a big "FU" in a big way. And there have been some really big strikes. I thought they wouldn't do that, that they'd try to say, "Hey, don't take action against us, this is just against the U.S." But it looks like they're saying, "I'm just tired of getting pushed around," which is another indication. The reason I bring that up is because it shows they're all in on this. They're basically saying, "Listen, we're even going to hit other regimes in the area to put pressure on the United States, on Israel, and on their backers in the region. They're going to start suffering until everybody backs off—and then maybe we will too. Maybe there'll be some negotiation later." I don't think they're going to do it right now, though.

#Glenn

No, that's what I'm thinking as well. Probably, yeah, they would want an end to this, but I think they want to inflict some more pain. Otherwise, you're going to have a similar war again in six months, probably during negotiations. But what do you see as the wider war strategy of Iran here? Because I was also a bit surprised by the civilian targets—airports, hotels. The foreign minister said they attacked hotels because they housed American troops. But still, I've seen a lot of other civilian targets that didn't. You know, it fits more with your analysis that it's more about causing pain. They jumped straight into closing off the Strait of Hormuz. They attacked ships—four oil tankers so far, if I'm counting correctly. So what is the strategy now for Iran? I mean, if you sat down with the war planners, what do you think they would say?

#Daniel Davis

I think they've calculated that they're going to run this out for a number of months. They're all in. So they're going to shut down all this stuff. They've been signaling they were going to do it, but no one

believed them. And they're sick of it. After 47 years of taking this kind of punishment—from their perspective—they're done. So now, new rules are in effect, and everyone's going to go by what they say. Others are finally going to taste some of the pain they've been taking. I think they see this as a genuine existential crisis. It looks to me like, in their councils, they must have calculated that they're going to suffer badly for this—no doubt about it—but they'll have a shot at a positive outcome in the end, which is to drain the United States dry.

The whole issue with the Russia-Ukraine war is that it's a war of attrition, and both sides have a lot of inputs. So it's taken years, and they're still not there. As bad as Ukraine has been hit, they can still keep going. The United States, on the other hand, is not analogous to the Russian side in that one. We don't have that much capacity to just go for years like this. As a matter of fact, you heard General Jack Keane on the morning of the attack boasting that we could do this for two or three weeks. And he said, maybe it'll be done faster because they assassinated the Ayatollah. Then they said, well, maybe it won't even take that long. Well, if that's your planning range, to me that was another major blunder by the United States—to admit that we have such a narrow window here.

So what you're telling Iran is, make sure you stretch this out longer than three weeks, because we're going to have a really hard time maintaining enough gasoline for our jets, bullets and bombs for our jets, the missiles—the air defense missiles, the air offense missiles, the attack missiles—all those kinds of things. We don't have that many to sustain an indefinite fight here. We just don't have it. And however many Ukraine or Iran has, they're also limited. So it's not like they can go on for years either, but they can go for more than three weeks. I think they've calculated that. And when you see these increasing videos from Israel, and now you see what I had feared—and what I'm angry about now—about the casualties, the United States, when those start to pile up, and believe me, they're going to do everything they can to accelerate those numbers of casualties in both places, people at home are going to start saying, "Wait a minute, why did you do this? Where's this quick victory?"

And especially if it drags out past three weeks, people are going, "Hang on, you guys said this would be an easy win, something we could get done." Now we have Trump saying, "Hey, maybe within three days we can have a ceasefire or negotiation." But what if it's the fourth day, the fifth day, and there's still no sign? The bombs and missiles keep falling from Iran's side. Then they start hitting more targets while we're running low on air defense missiles. And if they start sending wave after wave—three, four hundred at a time—of the Shahed drones, reportedly they have tens of thousands of them, and they could keep that up for a long time. We haven't even seen those yet, at least not at scale.

And we've seen some of the smaller-number drones get through American defenses already—at Bahrain in particular, there's one well-known video out there. If you keep going down that path and suddenly we can't even stop drones because we're running low on air defense capabilities, and we start suffering even more casualties as time goes on, then there's going to be incredible political pressure on both Jerusalem and Washington to start looking for something. And now then—I think, if you ask me what their overall objective was from the Iranian side—it's to cause so much pain that

we come back, you know, hat in hand, looking for a negotiated settlement that's much worse for us than the one that was on the table the night before all this, from the Omani foreign minister.

Now then, those deals are gone. They're never going to come back with those kinds of generous terms again. Now they're going to be demanding a lot in return—dropping sanctions, changing designations, getting rid of the terrorist label, and so on. I don't know that they'll trust us on anything, but if they get something like that—some change in the negotiations and the sanctions—that could be a win for them, something they might consider. But it's going to take a lot of pain on our side to get to that point, because the anger and the hatred are so high for them. And now our arrogance has been called out—it's been challenged—because for us to admit that we're not strong enough to compel compliance from little Iran doesn't...

That's going to be a major, major problem for our side—something they won't do easily—and it'll be fought fiercely among all these war-lusters and warmongers who loved all this and had been pleading with Trump to do it. And he finally gave in. You can imagine they'll keep pushing. And of course, then they'll blame Trump if he agrees to anything like this, saying, "Oh, he just didn't have the stamina, he didn't have the stomach or the courage to keep going. We should have stayed." You know, they'll blame everybody in the world except themselves, and they'll see the disaster they created—what they wanted, what it cost us. But that's a lot on the table here. That's kind of where I see this going, which means a lot more people are going to die and a lot more things are going to get blown up.

#Glenn

Were you surprised, though, that there was no gradual escalation ladder here—that they went all out so quickly? I mean, this is just the end of day two, and already all these countries have hit the Strait of Hormuz, even civilian targets. Like you said, they're going all out. Did that take you by surprise?

#Daniel Davis

It was fifty-fifty. I wasn't shocked, but I wasn't fully on board. I didn't think they would—like I said, they did go a little further than I thought—but it's logical. It's what I would have done. Based on their forty-seven-year history, I didn't think they would. I thought they'd go bigger than they did in the Twelve-Day War. I thought they would attack the U.S. bases, and I thought it was a coin flip on the Strait of Hormuz. I figured that might be a negotiating tactic—like, "All right, we'll ramp this up." But it looks to me now, based on the evidence, that in their councils of discussion before this started, they said, "No, we're all in."

If the United States and Israel start this war, we're just all in. So now I think their calculation is basically, "Yeah, there's no more ramping up anything—now that you've assassinated our atoll." And in that same council meeting, it's my assessment, based on the evidence, that they said, "Hey, he's

eighty-six years old; he didn't have that much longer to live anyway." And I think he said, "I'm not going into the tunnels. I'm not going to hide. I'm going to stay right where I always am every day. And when the bombs come, they'll take me out then. Use me as a martyr, and use that to rally people in our country and across other parts of Shia Islam." And it looks like that's succeeding, at least so far.

And I've seen—I've talked to one, and I've read that a friend of mine interviewed another Iranian—who were just passionately against the Ayatollah and have protested against him in the past. They said, "Listen, y'all are putting us in a terrible situation, because we hated the Ayatollah and wanted to get rid of that regime. We've been protesting for years." I've known this guy for well over a decade, and others have said the same thing: "Look, while we don't like him, do you think we're going to embrace Israel—our biggest enemy in the region, who's been doing all this stuff to us since the 2010 Stuxnet attack and onward, assassinating our people in Tehran, blowing up our embassies and so on—and now they've attacked us twice?"

You think we're going to embrace what they're doing and somehow succeed? No. And they're not going to come tell us that Reza Pahlavi is going to become the new leader of Iran. I mean, are you serious? That's the family we rose up against in 1979. There's no way they're going to take him back or that he could govern any kind of coalition in Iran. At least that's my opinion. So they're angry at Israel—they're not going to embrace it. If our thought was that we'll cause enough mayhem and wound the leadership of Iran so the people will rise up because we've killed a bunch of their people and done all this stuff, and then that's going to be, "Yay, good for us," well, that's just not how it works.

Like Lindsey Graham—he's the biggest proponent of that. I think they're angry at him too, because the assumptions were badly flawed. Now that they're in a bad position, they're not going to turn against their own country and embrace what they've been calling the "little Satan" for 47 years—or the "great Satan," in our case. So I think that no matter what weird words come out of Trump's mouth—like, "Oh, these great and wonderful people of Iran, we look forward to having them"—they're saying, "Listen, we know it's the same kind of language you guys have been using with everybody. You said that about the people in Libya, you said it about the people in Somalia, you said it about the people in Afghanistan, in Iraq, etc. You always say that kind of stuff."

And then you walk away the minute it's unhappy. That's what they're saying. And we know how that works out—we've seen this play before. So we know this isn't about us. You're not going to do anything for us once you get what you want, which is the fall of that regime. That's another reason they're not exactly falling all over themselves to do what we're asking them to do—to basically become our boots on the ground so we don't have to send in an army. I think they're saying, "Yeah, you want an army? Bring an army. If you want to roll in and do this stuff, do it. Don't ask us to die in large numbers on the ground because you don't want to send in an army. By the way, we don't even like you." So that's complicating our strategy, too.

#Glenn

Yeah, it's so—well, you know, in the United States there are many people who really hate Trump. Some even moved away from the country because they don't like him. But even those people wouldn't back, you know, Chinese forces bombing Washington or New York. I mean, it's kind of crazy, this assumption that you can just sell the idea that, yeah, we're fighting with you guys—the people. If anything, it's just a way of weakening the opposition. I did want to ask you, though, about the vulnerability of the aircraft carriers and the U.S. Navy overall, because the Iranians' missiles seem to go everywhere, hitting targets in almost all the countries of the region. However, the U.S. Navy seems to be—well, I'm not sure if it's been untouched. I haven't seen anything. Have the Iranians attempted, or is it simply beyond their reach?

#Daniel Davis

I don't know. I've seen one video that claims to be from some Chinese tourists or something like that. I'm not sure if it was Haifa or Tel Aviv—somewhere—where they claim to show this grainy video of a U.S. ship getting hit. I don't know; there are so many deepfakes out there. You can't take anything at face value anymore, even really good-looking videos. So I don't know. I certainly haven't heard any reports on that. I had heard there were some reports of U.S. casualties—killed in action—earlier in the process, like in the early hours. And the Pentagon—or, I'm sorry, Central Command, CENTCOM—said no, there haven't been any. Well, from some direct sources that some of my friends know, they knew there were, but that's what they were saying.

And then, of course, today they confirmed that there were three killed, five seriously wounded, and a number of others less seriously hurt. My sources are saying even that number isn't true—it's low. It's higher than that. So we can expect to see more coming out. It's possible there have been some incidents, but we haven't been reporting them so far. We're afraid of the news because, unlike on land where there are ten thousand cell phone cameras every time something happens in the city, that's not the case out at sea. No one would know unless it's reported. So maybe there has, maybe there hasn't—I don't know. That's one thing that's surprised me. I expected to see that. But whether it hasn't happened or we just don't know about it yet, I can't really say at this point.

#Glenn

Well, how would you assess the developments going forward in the next days and weeks? Again, this is a war of attrition, right? Should it be judged by each side's ability to cause pain to the other and also to absorb that pain? Is that how we should understand the actions on both sides? Or is the United States looking more for...

#Daniel Davis

Ultimately, it's a battle of wills. I mean, you can generally say that about every war, but this one even more so because we chose to try it on the cheap. We said, "Let's bring in all this naval and air power, but no boots on the ground," because that's like a bugaboo in the United States. And there are many people—including Senator Trump, I think Senator Cotton, Senator Cruz, and Senator Lindsey Graham—they all repeatedly bragged about how there were no boots on the ground. Nobody was talking about that. President Trump said it because they know that's something American voters hate. So they thought, well, maybe we can win this on the cheap. But instead of, like in 2003, when we had a lot of air and naval power and a credible ground force of hundreds of thousands of troops that, when necessary, rolled in on the ground—well, you know, if you're talking about President Trump telling the IRGC, the police forces, and the Basij and everybody else to put down their arms...

Well, that doesn't carry any weight if there's nobody there to make you do it—just bombs falling. Unless you have an army that can come in and compel it, like the Iraqis did when we said the same thing to them. And then here comes the First Armored Division rolling up the street—that's going to have some teeth. But this one here, there's no armored division, nobody on the ground whatsoever. So there's no reason for them to capitulate. They're just like, "All we have to do is survive the onslaught." And, you know, they know how many weapons we have—or at least they have a pretty good idea.

They know that we've been bled—you know, deeply. Maybe not dry, but we've been bled deeply by all the support we've given to Israel since October 2023. They know we've been bled because of the four years of nonstop shipments to Ukraine. And it doesn't matter that Trump didn't give it away—he sold it. Our inventory has still gone down, and our production has gone out there. Nothing was replaced that was lost during the Biden administration; it's continued to dwindle. And now, all of a sudden, we need it. And they know that. Look, they've piled up all this stuff for years, for decades, because they've always seen this as a possibility.

We have no idea how many missiles they actually have, how many drones they actually have, because they're underground. And, you know, we can't count those. We can't go in with satellites. But we can imagine they have a lot. Senator Ted Cruz said today that his understanding is that Iran can produce, right now—with all these sanctions, all these fires, all these attacks we've made—still about a hundred missiles per month. So whatever was lost in the 12-day war has been replaced. And we don't even know how many they had before that. I've heard wildly different assessments, but whatever it is, it's a decent amount. And that's on top of the tens of thousands of drones they have.

So I think they've basically said this is going to be a test of political will. Our will is to keep it going beyond their two-week window, to stretch it out for two or three months after that—when they'll really start hurting. Because if we don't have many air defense missiles left, and we end up like Ukraine, where they have an inadequate number of Patriots and IRIS-T and all the other kinds of air

defense systems, then Russia can come in and flood the zone with more missiles than there are interceptors. Stuff is going to get through.

Iran could be in that same, weirdly enough, position as Russia—where we use up the bulk of our interceptors at the rate we're going right now. And all of a sudden, we can't knock that many down. By the way, there was some pretty dramatic footage—I think we're going to show one of the clips on our show this afternoon—of an American, reportedly an American videographer, I think it was in Bahrain. They had the camera up, and you could see an incoming missile. Then you saw a Patriot interceptor fire up to meet it, and because the angles were just flawless, you could see it missed. The Patriot missed, and the other missile came in and hit very close to where the guy was on the ground.

I mean, that's... that's day one. That was the first day, and you're already seeing we're missing. Now imagine if you don't even have enough of those. So now the missile comes in and there's no defender—there's not even one missile going up. And you can see that once that happens, they can start putting more and more of these lower-cost drones in the air, because you can't knock those down in quantity either. So I think the Iranian side is calculating, "We're just going to increase the pain on you until you can't survive anymore." Our strategy, on the other hand, is like, "Oh, snap, I thought this was going to be done in a few days, maybe a week or two, and then they'd capitulate."

So that's still the hope. They're saying we've got a couple of weeks of really high-intensity strikes left, and there's a lot of pain we can bring on the Iranian side. I'm sure we'll continue, along with Israel, to try to inflict as much damage as possible, hoping we can push them to that point. But if we get beyond that and the Iranian side is still viable, while our side is running low—our inventories of offensive and defensive missiles are shrinking—it doesn't matter how powerful our Navy is, how many fighter jets we have, or how many Patriot missile batteries we've got.

None of that matters if you don't have the missiles. That's the key issue that too few people recognize. It's about the inventory of your offensive and defensive missiles. And it could be that Iran has more of them—certainly more to use here. I mean, unless we rip everything out of Indo-Pacom or everywhere else in the world and bring them here, and now we're literally empty-handed everywhere else, that could be a real problem. But there'll be a temptation to do that. This could be a major, major problem for our side if it doesn't end within a couple of weeks. So much for the pivot to Asia.

#Glenn

This is the opposite of what Trump was planning to do.

#Daniel Davis

That's going to be the raiding of Asia to get what we need to fight here.

#Glenn

Sorry, just one last quick question. You mentioned that the U.S. can, well, exhaust itself, and the Iranians can inflict a lot of pain on the United States. But what do you think is the most vulnerable area? Because if I were advising the Iranians, I'd point out they have many pressure points they can push against the U.S. They can hit American assets in the region—that is, all the military bases. They can hit the Gulf states, even civilian targets, to make sure those countries go through a lot of pain—even oil refineries, whatever they want to go for. They can also go after the global economy, for example by shutting down the Strait of Hormuz or disrupting some air traffic. They can also focus heavily on Israel. As we speak, you have all these missiles raining over Jerusalem. Which area do you think is most likely to break first? Because...

#Daniel Davis

This will tell us where the Iranian mindset really is right now. My guess, based on what we've seen so far, is that they made a statement by firing on Dubai, Bahrain, and some of these other cities. I think they're basically saying, "Okay, message sent and received." I think we got that. But now, because quantity is an important thing, I think they'll shift to higher-value targets. And for the United States, that pressure point is casualties. I think that's what they'll go for, because there's already been a lot of anger in U.S. social media, even at some high levels, about the casualties that have already happened. So I think they'll prioritize anything that's going to produce high casualties for the United States throughout the region, at all of our bases.

And maybe they'll start going after the ships—I don't know. And then the same thing in Israel. I think they'll go after casualty-producing capabilities. I think they're going after the military first, especially anything related to intelligence. They'd love to hit those. I've seen some reports that they did go after some intel facilities inside Jerusalem, trying to degrade their ability to track what's going on there. And of course, if they can target missile launchers on the Israeli side or their aircraft, that would be a high-value target. Same with the United States Air Force—if they could knock those out, or take out the tankers, that's a big thing too, because it would limit our ability to even use the fighter jets we have.

But I think what they do next depends on what we do. If we don't go after the Iranian oil infrastructure—their energy supplies, their refineries, and so on—and I haven't seen any reports that we've done that yet, maybe we have, I just haven't seen it. But if we start going after that, especially at scale, and we can fix those targets—it wouldn't be that hard—then I think you're going to see Iran start to pivot. Because part of the signal, I would imagine, is that when they hit all these civilian targets, I can say, "That's bad for you." And I think it was Qatar—or maybe it was Dubai—where they hit a high-profile hotel in the middle of the city, full of tourists and everything.

They hit an airport, but they're like, you know, we could also hit something else that's important to you—and that's your oil infrastructure. We can hit your refineries. We can hit your transfer stations

at the ports, etc. We could cause profound damage that would take a long time to fix and come at much, much higher costs for the kingdoms themselves. But I don't think they'll do that unless we go after theirs. So if we try to ramp this up to bring more pain on the Iranian side, then I think you could see an expansion. You talk about the escalation ladder—I think it started on rung four or five, but there are still rungs above it that it can go to. So there's some room left to escalate, and I hope we don't get there.

#Daniel Davis

But those are the things I'm worried about.