

Col. Daniel Davis: Strait of Hormuz SHUTDOWN: No US Strategy Left?

The interview argues that official claims of a decisive victory in the Middle East are misleading. It says Iran still retains key military capabilities, the Strait of Hormuz remains effectively closed, and rising oil prices expose the gap between rhetoric and reality. The discussion suggests there is no clear U.S. strategy, diplomacy lacks credibility, and talk of negotiations is contradicted by military deployments. It also warns that any ground operation or attempt to force open the strait could become a costly, dangerous escalation.

#Nima

The current situation is the escalation in the Middle East. Before we get there, yesterday we had Donald Trump together with Pete Hegseth. Pete Hegseth came on the podium and said something really interesting. A lot of people want to know what's happening, and here's what Pete Hegseth said.

#Guest

Mr. President, you're spot on. Never in history has a modern military—Iran had a modern military, a modern navy, a modern air force, modern air defenses, leadership, massive bunkers—never has a modern military been so rapidly and historically obliterated, defeated from day one with overwhelming firepower. The air campaign that we've conducted, that Israel's conducted alongside us, was one for the history books, truly. And it's because we have a President of the United States who, when he sends his warfighters out to fight, unties their hands to actually go out and close with and destroy the enemy as viciously as possible from moment one. And that's why we see ourselves as part of this negotiation as well.

We negotiate with bombs. You have a choice, as we loiter over the top of Tehran, as the President talked about—about your future. The President has made it clear that you will not have a nuclear weapon. The War Department agrees. Our job is to ensure that. And so we're keeping our hand on that throttle as long as it's hard, as long as it's necessary, to ensure the interests of the United States of America are achieved on that battlefield. This is not Iraq or Afghanistan. This is not a President who's interested in vague end states. He's been very clear with us about what we need to accomplish—creating the conditions for them never to have a nuclear capability—and that's exactly what we're doing, in historic fashion. Thank you, Mr. President.

#Nima

Thank you.

#Nima

What's the reality of what's happening right now?

#Daniel

Nima, that is really hard to watch, man—especially for somebody who served a career in the U.S. military and had four combat deployments of my own. I'm just like, what is he talking about? I mean, let's start with the first part there—that we have historically defeated a modern state. I mean, we talked about it: the Iranian side has F-4 fighters from the 1960s. So, not quite like a fifth-gen fighter that you defeated. First of all, he's trying to make it sound like we have this massive capability, like we defeated the Russians or the Chinese, or this really powerful modern force—which is nonsense. Of course, just at face value, that's nonsense.

But then, okay, if you've defeated them in historic fashion, then I guess the war is over, right? I mean, let's start popping the champagne corks, man, because it's time to schedule the parade. Here we go. Oh, hang on—the Strait of Hormuz is still closed, and we've killed a lot of people in Iran, but they still have a navy. They still have a rocket force, a ballistic missile force, and a drone force. We haven't done anything to knock those things out. Maybe we've diminished some, but we certainly haven't knocked them out, as Israel is testament to on a daily basis—and some pretty big targets here. So, you know, what the hell are you even talking about, that we had, past tense, defeated this other force?

Because all that does, in my view, is bring even more shame onto the administration—onto Secretary Haxton personally—because everybody in the world who has two eyes and one brain can see that you've dropped a lot of bombs. Fifteen thousand different targets, by the last estimate I saw—it was listed yesterday by CENTCOM. And yet all those strikes have not brought the country to heel. They haven't resulted in regime change, despite the strange things President Trump said about that. They haven't taken away their missile force, their navy, or their support for regional allies. And the Strait of Hormuz remains closed. Ergo, you have resolutely failed in every single category you set out to achieve at the beginning. Why, then, do you want to talk like you're bragging about some kind of victory?

Only people on some of the conservative media who keep repeating this stuff seem to be the only ones buying it. And I don't know how much they're really buying it, as opposed to just repeating the story. I guess they just want to tell their followers and supporters, "Don't believe what you see. Don't believe what you're hearing. Fake media, liberal media—they're lying to you. We've already won. It's just about cleaning up the battlefield. Don't worry, we've won." I guess that's their idea. But I mean, when you're cheering along watching that TV show, and then you go to the gas station to fill up your tank, you're going to go, "Hang on, that's a lot more than it was just a week ago." You can't spin that part. So I don't know what the objective is here. Is it weird?

#Nima

You mentioned the objective. It seems that when they first talked about it, it was regime change, but that somehow shifted over the last 26 days. Now they're talking about opening up the Strait of Hormuz. So what is the objective? Is it opening the Strait of Hormuz? And what are the administration's strategies to achieve that? And we know that—go ahead, Carl. Sure.

#Daniel

I mean, at least what they're saying is, "Hey, how about a negotiated settlement? That would be great." Oh, wait a minute—we were already negotiating twice, and then we went to war and basically used that as military cover to start conflicts. So, I mean, the Iranian side would be the biggest fools on the planet if they believed anything we said at this point. And right now we desperately need them to believe and to trust that whatever negotiation would be offered, we'd actually follow through on it. And, of course, you can even go back further than that to the 2018 withdrawal from the JCPOA by this administration. They've literally shredded any pretense of credibility in anything they say. Why would anyone listen to that? And yet, that's what we're doing here.

So we are, on the one hand, talking about this negotiation—this 15-point plan that was apparently proffered by the administration—which, as you know better than I do, is not exactly being received with enthusiasm on the Iranian side. But then, simultaneously with that, we're also seeing the deployment of lots of ground combat power: the 82nd Airborne Division, the 31st Marine Expeditionary Unit, the 11th Marine Expeditionary Unit, A-10 Warthog close air support aircraft, Apache helicopters—which are also ground support aircraft—the V-22 Ospreys, Chinook helicopters, everything you'd need to have a ground operation. So while we're talking, everything in the world says we're coming to have a ground operation. Which, of course, only the greatest fool in the world would ever pay any attention to—and they're not. So no one's paying attention to the diplomatic side.

Everybody seems to—and certainly, I would imagine, on the Iranian side—is getting ready for a ground operation somewhere, whether it's Kharg, whether it's—I think it's called Qeshm Island, in the horseshoe of the strait—or maybe somewhere else. Maybe somebody has this harebrained idea that we're going to go and steal away this reprocessed material, if we even know where it is, if it's even in one spot. That would be just suicidal for us to even attempt. But that seems to be where we're headed now. So you ask what the objective is. The objective—they don't know. They don't know what it's going to be now. We went in hoping that a shock-and-awe kind of thing, and a decapitation by an assassination of the supreme leader, would result in a collapse of the government. That didn't happen. And now we're in, and they're going, "Oh, snap."

Somehow I didn't think they would actually do what they said—attack our assets in the region, attack Israel, attack the Gulf GCC countries. They said all this ahead of time, and we didn't think they would do it. Trump said so out loud. He was asked about two weeks before this happened,

when Iran was saying they were going to do this, and he said, "Well, they said that last time and they didn't do it. They wouldn't risk that." And then, you know, I think Iran also indicated they would close down the Strait of Hormuz. Many commentators said that was likely. Apparently, we didn't think that would happen either. But then all of those things happened.

Now then, the president and the Pentagon are going, "Oh, crap, what do we do now?" We've got to try to find a way out of this, and there are no easy options. This isn't like the situation with the Red Sea in 2025, where you could say, "All right, well, this really isn't working. It's really expensive, and we can't bomb them into submission. We'll just say they begged us to quit and walk away—no problem." There was no issue with the Strait of Hormuz then, and the oil wasn't being held ransom, if you want to use that term. That's the case now, because we've handed all this leverage into the hands of Tehran—leverage that never existed before and wouldn't have existed had we not gone into this war.

And now there are no obvious exit ramps, because as long as the Iranian side stays stalwart and long-suffering, and understands that—yes, we do have a lot more bombs to drop, and there are still going to be a lot more people killed, a lot more things blown up, and harm done to the economy—if they can remain steadfast, retain political viability, and maintain control over that strait, then there's no off-ramp we can take. Because the longer this goes—and you tell me if you think the Iranian side can actually sustain that kind of harm for an extended period, like 12, 18, even 24 months—and because we can't, we'll be lucky if we can make it another two or three months. Some economists I saw this morning said that within two or three weeks, the price of oil—it's being artificially constrained right now by statements Trump has made in the last four or five days.

But that's going to run out, because there's not going to be enough physical resources—uh, petroleum—to actually meet the needs. And then you have the issue with urea and all kinds of other things on top of that. You can't spin those for much longer, and at some point market principles will make themselves known, and the price will go up. There's no off-ramp for President Trump, and now that's going to start causing political problems, then economic problems across the board, and pressure from countries all over the world to bring this to an end. So they're going to be pressuring President Trump to get off board. So the bottom line is, Nima, there is no strategy. There is panic in the White House.

#Nima

Colonel, I believe that from what I've heard and seen so far, Iran is prepared for a long war—a marathon. I think it's the same strategy we've seen with the Russian army so far. They're not in a rush, but they're prepared to defend themselves. That's why you see a sort of calmness. Today, everything looked normal in Iran. On the other hand, you had the Israeli mayor going live and breaking down, crying, "What is happening here?" But you don't see that kind of panic in Iran. To be honest, you just don't see it.

You follow the Iranian media, the Persian media—you don't see any sort of panic. You see the destruction, you see the death, but you don't see the panic. That's the problem the Trump administration doesn't understand, in my opinion. And the other thing is, when it comes to the numbers, it matters when you go underground. It doesn't mean air power isn't important, but what you have underground is much more important for capturing and holding territory, to sustain that kind of operation. What's your understanding of the numbers they're providing to the region? Because, after all, that's a huge factor in the calculation.

#Daniel

Well, at least publicly, what's known is that in terms of ground forces, there are around 3,000 82nd Airborne troops from the Ready Brigade. There are about 7,000 combat Marines from two Marine Expeditionary Units, and then some unknown number of special forces, like Army Rangers. So maybe around 11,000 total personnel involved in this. And that's not necessarily trigger-pullers—people who could actually fight—but that's the total force number, because a lot of that is command and control, headquarters, supply, logistics, and that kind of thing. So it's a lot less when you talk about the actual ground troops, the ones carrying rifles or whatever.

But these are all light—every one of them. So that's something you can use to, I mean, these guys are designed, really, every one of them, to go in and seize operations or seize pieces of terrain, like an airfield, only as part of a larger force so that heavier units can come in and sustain it. These forces aren't designed to seize something and stay there for an extended period of time, or to create a bridgehead and then launch out on some sort of conquering mission beyond that to take more territory. They only seize a bridgehead—but you have to have other forces. And that's the weird part: there aren't any other forces in the region.

There's nothing else—once you take something, where are the exploitation forces? Where would you go? What would even be the objective? I mean, let's just say Kharg Island, since that's what people are talking about the most. But OK, you know, about 90 percent of the oil is offloaded there for the Iranian regime. But that's not the only place they can get their oil out. Number one. And number two, I'd love to hear your take on this: what would the loss of some percentage of their ability to export oil really mean? I mean, with all these sanctions, it seems like they're kind of accustomed to getting by on less. We'll see how that works out. But what would we actually gain from that? Is it going to put pressure on the Iranian side that isn't already there?

I don't see a change in any dynamic at all, so I don't know what you would gain even if you succeeded. But, I mean, I've seen statements from IRGC leaders and some political leaders in Iran basically saying—Abbas Araghchi, actually, more than a week and a half ago, was one of the first people I saw talking about this—and he's like, "Yeah, bring it on. Are you kidding? Yes, absolutely. We'll wait for the Americans on the ground." And you can say, on the one hand, well, that's just braggadocio, just putting on a brave face publicly because there's a public relations war going on too.

But I'm putting myself in their position—taking the flags off and just looking at this from a military perspective: side A and side B, take all the hubris out of it. I'm thinking, if I'm on the Iranian side, side B, I'm like, man, I have every advantage in the world. It's on my home turf. I've got these huge mountain ranges that provide enormous defensive capabilities. I know the territory. I have no logistical blind spots. Everything is right here. They're coming from thousands of miles away. They have to keep this logistical bridge going all over the place—gas, fuel, ammunition—everything's got to come from far away. They don't know the terrain.

And so you go on here, and I mean, I'm talking rocket artillery, because any of these islands are going to be in range of ground forces as well—the continental forces. So you've got long-range artillery, drones of who knows how many categories, short-range missiles, medium-range missiles, long-range missiles. It could come from anywhere in the country; all could converge wherever they choose. It could be a weapons nightmare for whatever force lands there, whether they're successful or not. And then how would you sustain it over time if you did take it? So everything, militarily, to me says this is a disaster in the making, and I don't know why we would want to choose to fight this battle.

#Nima

Carl, here's what the U.S. ambassador to NATO said about trying to force NATO allies to join the fight.

#Speaker 04

We've been in overdrive here diplomatically, pushing our allies—both in Brussels and across capitals in Europe and the Middle East—to convince everyone. Unfortunately, it took some effort to make them see that this is more important to them than it is to the United States. I mean, we get very little, if any, oil through those straits. It certainly is affecting things. One of the great things President Trump was able to do was make America energy independent, and that independence obviously guarantees our supply.

Now, you know, we have allies that are finally stepping up. I think from the time this conflict broke out, they were pretty noncommittal about what they could bring to the fight or how they could help us. But they've done things that I think sometimes go unnoticed. We had several allies here in Europe and in NATO providing key and crucial basing, overflight, and access—whether it's Souda Bay, where I was in Greece on the island of Crete, or other countries, including Germany and France, that were supporting our ability to...

#Nima

Yeah, he's basically saying they've done everything they could, and their assessment is different from the Trump administration's. That's the difference. That's why they're not joining the fight in Australia, for the most part. What do you make of it, Carl?

#Daniel

Well, I mean, I'll just tell you right off the bat—if Secretary Hegseth was an embarrassment to me on the military side, this is an embarrassment on the diplomatic side. He's talking about, you know, "Why aren't they doing stuff?" and he tries to make this case that we're protected. I mean, I don't know what their problem is, because they're the ones who get a lot of oil from the Persian Gulf. We're fine because we're energy independent. No—we're not energy independent. We import, I haven't seen the current rate, but it's somewhere between three to five million barrels per day that we import on top of what we produce, because that's the mix of different fuels. We have to have that.

But secondly, if it doesn't matter, then why is the price of gasoline nearly a dollar more than it was before? Because oil is a global commodity. It doesn't matter where the oil comes from; it only matters what the global price is. And if the price keeps going up for the world, then it goes up for us too. So everybody in the world—not just the West—is going to be dependent on this. But the second thing, and the more important issue, is that both diplomatically and militarily, there's a reason why no nation has stood up yet to say they're going to bring military forces of any kind—naval or air power, and definitely not ground power—to participate in this. They recognize that it's an unwinnable situation.

There's no military solution that would let us force open the Strait of Hormuz at an acceptable cost or within an acceptable timeframe. There's a reason why our Navy—about a third of it, according to reports—is already deployed on this mission. So why haven't we opened it up? I saw General Jack Keane asked that question last week, and he said, "Well, we could, but we have global requirements." If we did that, sure, we could escort those vessels through there, but then we wouldn't be able to do anything else. That's why we need help from our allies.

But see, we know—that's why our ships are way, way out from the shore. We know that the minute you bring them even heading into the Gulf of Oman, even before you get to the Strait, it's like a gauntlet of death along the Iranian shoreline—something like 800 miles or so—that you'd have to navigate through. And, you know, at increasingly close ranges as you get nearer to the Strait and then try to get up to Karg, etc., you're not going to be able to drive a ship up there, even to get to Karg for an offensive operation, much less for a permanent escort mission.

And by all accounts, you did. I think we did this in the 1980s, during that operation under Reagan, where you needed a couple of military escorts for each one of these tankers. And you're talking about a hundred tankers a day just to keep the normal flow going. What Navy has the assets to do something like that? Even if you just roll through the Strait, even if they weren't attacked—

everybody knows they probably would be. And Iran doesn't have to sink every ship; they just have to sink a few of them as a warning. Then the next question is, which tanker is going to be the third one destroyed?

If you hit the first couple, then who's going to be in line to be number three—to go to the bottom of the Persian Gulf? No one's going to do that. So it's effectively closed, and it takes so little for Iran to keep it controlled. They don't even have to mine it anymore. I think that's more of a last-ditch effort—if they got really, really desperate, they could do that to firmly close it off for everybody. But they don't need to right now. Just the threat of it—because there have already been a number of tankers that blew up spectacularly in the Persian Gulf, and the flames made great video, which scared everybody.

And so now, only those that get permission can come through, and that's a limited number so far. So why would anybody in Europe send their ships to do what our own ships won't do—what our ships can't do? Because whatever is said publicly, and whatever attempts to shame our allies, like the ambassador was trying to do there, it's not going to work. At the end of the day, the same logic that's kept us from putting our ships in harm's way will keep them from putting theirs in harm's way. So they'll agree to some amorphous kind of support—"We're behind you," whatever. "We're going to help with some kind of..." I think the British said something like "keep the Hormuz Strait safe," or some amorphous thing like that. But it didn't commit to any kind of hard military power or a timeframe, etc.

And I think that's what you're going to see, because nobody is going to sign up—nobody, diplomatically or politically. No one from Europe could survive if they said, "All right, I'm—I don't know, I'm just picking Greece, or the UK, or France—I'm going to send my ships there. We're with you, President Trump." And then they go to the bottom of the sea. Now, how are they going to face their electorate when people are saying, "You just killed our sailors from our own country, when the Americans won't even send their own sailors in there. Now they're dead, our ships are at the bottom of the sea. Get out of office, we're going to fire you," or whatever. Nobody would face that, because that's what would happen if they tried to go against what the IRGC did. There are too many ways they could damage or destroy those ships.