

Daniel Davis: Trump's War Speech: Iran Escalation & Death of NATO

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. Lt. Col. Davis discusses the ongoing escalation and strategic vacuum in the Iran War, and the likely death of NATO. Recorded April 2, 2026. 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 Go Fund Me: <https://gofund.me/09ea012f> Books by Prof. Glenn Diesen: <https://www.amazon.com/stores/author/B09FPQ4MDL>

#Glenn

Welcome back. We're joined today by Lieutenant Colonel Daniel Davis, a four-time combat veteran and host of the *Daniel Davis Deep Dive* YouTube show. As always, I'll leave a link in the description. Thank you very much for coming back on the program.

#Daniel Davis

It's always my pleasure to be here. Thank you very much for having me.

#Glenn

We see that Donald Trump just gave his address to the nation—a sort of war speech—in which we got a lot of, I guess, mixed messages. On one hand, Iran was defeated, but also, if they don't capitulate, he'll bomb them back to the Stone Age. NATO—well, they don't want help, but also we don't need them. The Strait of Hormuz, I mean, it has to be opened, but also it's not our problem; other people should open it. I mean, there's a lot of... it's a bit all over the place. Overall, it indicates a lot of uncertainty, you know, covered up with a lot of bluster, I guess. How did you make sense of this speech? Because it was announced in advance. And again, did you hear anything new, or what did you make of it?

#Daniel Davis

Well, I certainly didn't hear anything new because, I mean, he'd been talking about this the previous afternoon, around 5 p.m. He said it was going to be roughly two to three weeks before the war was over, and he was kind of winding things down. So when it was announced a few hours after that

conversation that he'd be giving an address to the nation, the assumption was, well, he's probably not going to repeat himself since he just said that—so it must be something new. But when he actually spoke, he really didn't say anything new. He just reiterated the same thing about the two-to-three-week period and repeated that they were talking with them.

But if they don't do what they're supposed to, then we're just going to walk away, basically—or at least from the Strait—saying it's going to be somebody else's problem to deal with. We've done the hard work; you know, "Why don't you guys get some courage?" He repeated some of those phrases from his Truth Social posts earlier, just the day before. So we didn't hear anything new. But what we did hear, to me anyway, were continued statements showing that he's still disconnected from reality and doesn't realize the desperately bad situation the United States has been plunged into by his war of choice. The Strait is not going to open up. It's not easy, and it cannot be—cannot be—opened by force of arms, whether by us or even if the entire NATO navy joins us.

It wouldn't make any difference, because that's not the issue. The issue isn't sailing warships through the Strait and somehow thinking that's going to open it up. All that would do is turn it into a shooting gallery for those warships—which is why no nation has sent any, and why our own Navy hasn't done it already, because we know the cost. Nevertheless, the Strait remains closed. And now you see oil continuing to go higher and higher. Unlike some of his previous comments, when he made statements the market calmed, the price of oil went down, and the stock market went up. This time, the opposite happened—the stock market went down and the price of oil spiked immediately, because people around the world now recognize what's happening with oil.

All right, what you're saying has no relevance to any kind of reality. And the war is not winding down in two or three weeks—what does that even mean? You've been unable, in five weeks, to do anything of substance. The Iranian government, even though you assassinated a lot of their leaders, is still firmly in place. Their missiles still retain full capability, as they showed yesterday and today. To reiterate, in Israel their navy is still largely untouched—at least the part that matters, which is the speedboats, the drone boats, and their submarine forces. Those have mostly been untouched. So whatever you hit on the surface hardly even matters.

Because what matters is what's still underneath—these tunnels that are everywhere. Some estimates before the war said there were as many as 3,000 of those boats ready to go into action if needed. Obviously, they're not going to come out unless they have to, because then they'd be targeted. But there's also the issue of the proxies—not only have they not been quelled, they've now joined the fight: Kataib Hezbollah in Iraq, Lebanese Hezbollah, the Houthis. I mean, they're all now, in one way or another, at one level or another, participating. So they've stepped it up, and there's nothing we can do.

And for President Trump to say, "I'm going to bomb them into the Stone Age," just exposes his lack of understanding of two major things. Number one, we don't have enough ammunition to bomb a country that's four times larger than Iran, with 93 million people, spread out as it is, much of it in

terrain that's very difficult to reach. You're simply not going to be able to do that. We don't have enough ammunition in any case. And even making the attempt would just solidify and steel the resolve of the Iranian people. And we see that, by the way—just one, let's see, 12:37—so about an hour and a half ago, President Trump posted a Truth Social statement.

He says the biggest bridge in Iran has come tumbling down, never to be used again, with much more of it to follow. It is time for Iran to make a deal before it's too late and there's nothing left of what could become a great country. And in it, he shows a video of this large span—this bridge, a civilian bridge in Tehran—that has no relation to any military capabilities, which makes it, by definition, a war crime, or at least likely one. We'll wait and see once people do some analysis on it. But on the surface, it looks like he's following through on what he said last night about bombing them into the Stone Age.

And then here's his first example. He's bragging about it, which could definitely put him in legal jeopardy going forward—him along with the Secretary of War, Pete Hegseth. But all that's going to do is make people not talk to us since that happened. Just a few minutes ago, I talked to a good friend of mine who's an Iranian expat in this country. He's been absolutely against the regime from the beginning and has always been looking for ways to maybe help bring about a change of government in his country—something that would give the people freedom and allow him and some of his family to go back.

So he's totally opposed to him, and yet he's incensed and says this is nothing but a war crime as he sees it, because he obviously knows Tehran quite well. Another one of my friends who knows the area well says the same thing. So, if Trump thinks this is going to cow the Iranian people—if he thinks this is militarily going to accomplish anything—the exact opposite is likely. It's going to firm up the grasp the Iranians have on the Strait of Hormuz, keep prices going up and the stock market going down, and cause problems all over the world. Other than that, it was a great speech.

#Glenn

Yeah, other than that. Well, this is the interesting part. I think Trump realizes he's got his back against the wall and there's not much he can do at this moment. He said himself that he's running out of military targets. So it seems like the only strategy now is to bring a lot of pain to Iran by destroying civilian infrastructure, hoping that this would encourage Iran to sit down and make a deal. But again, I think what's often neglected is that when a country faces an existential threat—and I think Iran quite reasonably considers this to be an existential threat—everything changes.

They can't just give away or accept some poor deal, which would only make the threat worse in the future. But I think this is Trump's only plan so far—he doesn't have any other cards to play. That's why I wanted to ask you: on one hand, he keeps saying we're close to ending the war, maybe two

or three more weeks; on the other hand, he's also suggesting there will be a massive escalation. Do you see it in the same context—as in, we'll end the war soon by forcing the Iranians to make a deal—or is there some other plan?

#Daniel Davis

You said he doesn't have any more cards to play. Well, there are some cards to play, and that's on the ground—because the air hasn't worked, the Navy hasn't worked, the bombs and missiles and drones haven't worked. So maybe he thinks doing something on the ground could. And we've seen a significant escalation here in just the last week or so. A-10 ground-attack jets, which provide close air support for ground troops; Apache helicopters, also for close air support; the 82nd Airborne; several different Marine Expeditionary Units on the way; other Army Special Forces, Rangers—a whole range of different troops. Others have been alerted for deployment. So somewhere around 20,000 ground troops of various types have already been deployed, are on location, or are coming very soon.

Which implies he may be thinking he's going to play those cards. Well, the other ones haven't worked—maybe this one will. But I'll tell you, that's like playing a high-stakes poker game with an experienced player on his home turf, thinking, "I'm going to play these cards and win." Then you look over his shoulder and realize he's holding not even a pair, just a two and a six, and you're about to play that against someone with a lot of face cards on the other side. Because if we do that, I don't think it's empty rhetoric—many of us think Iraq should be one of them. Ghalibaf, the speaker of the Iranian parliament, and the IRGC folks have basically been saying, "Bring it on."

In fact, Ghalibaf, in a tweet or an exposé, literally said that: "Bring it on, because we have mobilized a lot of our reserves. We have a lot of people who've volunteered to serve. And they know this terrain very well, and they know that any attempt to use our troops would just be suicide." So if President Trump thinks he's going to win something—it's kind of like that poker game where you're betting the farm on not even two of a kind, just two low cards, against somebody else that you can see over his shoulder, with a mirror, has high cards and skill. You're still going to play them. That's how crazy this is. The chance of this succeeding tactically—much less operationally, and definitely not strategically—is almost off the charts.

Impossible. I mean, I could lay out all the details of why, even tactically, this is nearly a suicide mission. But it seems like that's what he's really doing, because other than that, I don't know what he's going to do with those troops—why they've sent so many over there. And if he doesn't use them, then what? I mean, are you just going to walk away—literally just walk away? I think he should. That's what I would advise right now. No matter what he's done, don't sacrifice a bunch of Americans to pointless deaths that will only worsen the situation. It'll be worse by trying and failing than by not trying at all. Whatever hit to your image you may think you'll take—but that's what I fear is about to happen.

#Glenn

You know, that's what I was thinking as well—sending in ten or twenty thousand soldiers. I mean, you can't dismiss the possibility that it might work, but the likelihood of this going wrong—everything from supply and support, even if they're able to land there—I'm not sure what they would do if they're not. I mean, there are so many things that can go wrong. If all of these soldiers were to die or be captured, it would just be an unmitigated disaster. And again, it's very difficult to swallow such a defeat; it would have to involve some kind of reckless escalation on some level. Anyway, it's strange that one is prepared to play this card, given that the outcome is so uncertain. But in Trump's speech, though, he made some other comments—he went through the list of all the people who had disappointed him, sharing the blame a little bit, or passing it on.

But the Europeans, as always, stand out. And he was making the point that NATO hasn't really done that much for us. We asked them to do something, and they didn't follow through. At some level, I—well, you know, this is not what NATO was supposed to do. He didn't even tell the Europeans he was going to do this. But on another level, I can also understand where he's coming from. The U.S. has been providing security for the Europeans for decades. And now, you know, they're closing off the airspace, not letting him use their bases. Poland refused to send the Patriot batteries to help. So I can understand a little bit from both sides where the frustration comes from. But what do you think this means for NATO? I mean, is NATO dead by now, or is this just one more nail in the coffin?

#Daniel Davis

I might differ with you slightly on this one point, because I don't think the NATO side has much of a valid argument here. I mean, the United States against NATO—because up until February 2022, I was a strong advocate that NATO needed to wind itself down, and to do so in a coherent, logical, rational manner. There was no need to keep expanding eastward. We should never have gone beyond the original members. I mean, just think how irrational it is, militarily, that this alliance—what was it, maybe 16 members in 1991 at the end of the Cold War—had resolutely stood against the entire Warsaw Pact, the Soviet Union, all its tens of thousands of tanks, thousands of aircraft, and millions of troops.

But then, after those disintegrated, somehow you needed to expand it. It was always irrational and illogical, and it could only be viewed in an antagonistic way by the surviving Russian state. I mean, it couldn't be seen any other way. It was purely like, "I'm going to poke a stick in your eye." It was unnecessary and unnecessarily provocative. And it was always clear that, as weak and disheveled as Russia was in 1992, that was going to be a temporary condition. Later on, things would change—which, of course, Putin famously marked at the Munich Security Conference in 2007, I think it was.

And here we are. We just keep making more and more problems. Once we started this mess with Russia—the United States was leading that charge, too—the Europeans were only too happy to join in until Trump came in and wanted to change things up. Now he wants a new kind of situation, and

it's no longer the same. You can tell by his comments in just the last few days: he doesn't view NATO as a collective security agreement with an Article 5, where an attack on one is considered an attack on all.

No, he says NATO is our plaything. You will pay a lot more money, and when I want you to go into action, you will. Even if we make a war of choice that you didn't vote for, that you weren't consulted on—it doesn't matter to me. I said, I want you to come in and join us. And even if you think the war is stupid, you will come in and you will send your combat troops, especially your Navy and Air Force, to join us. Or I'm going to be angry, and then I may consider walking away. And to me, no matter what happens here—to answer your direct question—I think, yes, I think NATO is dead.

I think it's done. I don't think it survives this. Even if the war in Iran somehow comes to a miraculous end really quickly and there's no further damage, I think the damage done by the Trump administration—making it clear that he views NATO as an extension of his own armed forces, that he can just give orders to and they're expected to take action against their own national interests—I think there's no reason for them to believe otherwise. So we're going to have to figure something else out. I don't think it'll happen overnight, but I think the pieces have been put in motion and that day is coming. I think it's ordained now. I don't see it going back. It should have happened a long time ago, in a coherent way.

I think now it could happen in a rupture, which would be kind of the worst of all circumstances. Obviously, it's going to be catastrophic for Ukraine. Boy, I bet they're really wishing they had taken that deal in Istanbul in 2022, or any of the other ones that were on the table, because they'll never get those terms again. And now they may just suffer an outright military defeat. There's almost nothing coming in from the United States anymore. Even the European states, like Poland, are saying, "Yeah, I'm not giving up any of my stuff because I might need it here." Especially as they see that the Patriots don't perform anywhere near as well as claimed on paper. So they want to keep as many of those interceptors as they can get their hands on, etc.

So it's kind of like... everybody's out for themselves right now. Meanwhile, the biggest victor of the Iran war so far is Russia. I mean, they're flush with cash, we've relieved some of the sanctions on them, and now Putin is coming out looking like a really reasonable guy. He released a statement—I think it was this morning—basically saying, "Hey, you know what, with all this chaos in the energy sector here in the Middle East, we provide some stability, and we're willing to do something that makes sense for everybody. We're not going to do what the United States is doing." And that's now an attractive alternative. And, you know, we could talk about China as well, but that's the big winner so far. So yeah, I think NATO's done.

#Glenn

Yeah, no, I used to have a similar opinion. That is, I preferred gradual reforms rather than very disruptive changes, because they destabilize the international system. So I thought NATO could

reform itself, you know, since it has the ability to accommodate both the United States and Europe, but also find a way to bring in Russia. But, you know, that never happened.

#Daniel Davis

I was for that.

#Glenn

Yeah, I'm kind of of the same opinion now. It can't be reformed. This is like the Soviet Union—it has to go, essentially. But I did see some other interesting comments on Trump's war speech, from Lindsey Graham of all people. He suggested in a tweet that the war objectives could have been met, even hinting that we might wind this war down. I've never heard Lindsey Graham ever call for winding any wars down. Do you read anything more into this, or do you think the panic is starting to set in? Yeah, that's it.

#Daniel Davis

That was in—at least I saw it in **The Hill** newspaper on the 30th. So that was two days before President Trump's comments. And then, after President Trump's comments, he was back to the normal Lindsey Graham you'd expect. He was absolutely cheerleading all this on, saying yes, we should keep going, the Iranians can't survive as a result of this, we've got to get them, and so on. You know, "Go, President Trump." So it seems he completely went back on what he'd been saying. I thought—and I interpreted it at the time, because I'd also seen a report in the **Times of Israel**—that the Israeli press, Benjamin Netanyahu, around that same time had said, "You know what, based on what's happened so far, we don't really see Iran as a threat to us right now."

And so I thought maybe those were signs that, OK, reality is starting to hit everybody. Now they're looking for a way to wind this down, trying to find any kind of off-ramp. But then it seemed to go right back up on the first. And now it's looking increasingly likely there's going to be some kind of ground operation or raid. You saw the Israelis assassinate—or at least attempt to assassinate—another diplomat, but they ended up killing his wife instead. Anybody who might be talking to the United States, anyone who might be willing to take a moderate view, just seems to, amazingly, die.

Anything that looks like it's moving toward a negotiated settlement—something blows up. And now President Trump seems to jump back on board. You have that attack in Tehran just now; more things are continuing to blow up. And of course, he threatens them with bombings—being bombed back into the Stone Age—completely eliminating any theoretical idea of diplomacy. Even though, in the same breath, he still says, "If they make a deal..." and of course, the only deal is if you abjectly surrender, walk away, do nothing, and let us come in and insert our person—like with Maduro in Venezuela.

I still think there's some fantastical hope there—this just unbased, unhinged idea that we can somehow twist this into a "Venezuela 2" operation, where we take control of their oil like we did in Venezuela and everything will be great. I don't know why they'd think that, but I think that's what they do. And therefore, I think the chances that we're going to keep ramping this up are pretty high. And, you know, based on what you just said, I agree that any military operation on the ground is going to be a bloody failure. That's going to send markets—the price of oil—through the roof, and it's going to send the prices of everything else through the roof too.

It's going to further damage our reputation as a military power, and definitely as a political entity that people should follow. And then—and I think I've said this before—my worry is that if it starts to look like it's going to be an abject military failure, and that even 100,000 or 500,000 troops won't rescue it, then President Trump, or Netanyahu, will consider the use of a so-called tactical nuclear weapon—which just means a small nuclear weapon. It's nuclear; there's no actual difference between a tactical and any other kind. You still have a mushroom cloud, and you have all the fallout that comes with it. So that's my bigger worry, even in the medium term.

#Glenn

Nuclear strike—yeah, no, we could be heading toward that. I mean, listen to some of Trump's rhetoric: "bomb them back to the Stone Age." He's made previous references like, "they shouldn't be able to recover as a nation." Pete Hegseth just tweeted, "back to the Stone Age." But when you hear this kind of language, it's so over the top and vile. You mentioned before that Putin comes off as the reasonable one. I also hear the speeches by the foreign minister of Iran—he's kind of making a point: "We don't have any problems with the American people; you have a political leadership that keeps attacking us." You know, it sounds very civilized and reasonable. I feel like the information war is being lost when one side goes so over the top with this very aggressive rhetoric.

It seems to backfire. But on the nuclear war issue—do you see that as Trump trying to push it further up the escalation ladder, hoping Iran won't be able to follow? Because Iran has nuclear material. I'm not sure how advanced their know-how is when it comes to producing a nuclear weapon. I spoke to Ted Postol, who made the point that they could probably put together a makeshift nuclear device—strapped to a missile, if it came to that. But again, there are a lot of uncertainties around this. So what do you think is the reason behind this strategy? They must know that if Israel or the United States were faced with a humiliating defeat, they could do something foolish and desperate.

#Daniel Davis

Yeah, I mean, it can't not be part of their calculation, which is why I think they're saying, "Listen, we're willing to stop this." Foreign Minister Araghchi said—the path, I'm sorry, no, it was Salehi—said the path to peace is open. "We still desire that." And so they're leaving the door for negotiations open, but on their terms, because I think they wouldn't have any premature withdrawals from their

current position here. And I think they're saying, "Yeah, we'll open the Strait of Hormuz." And by the way, it's already open—there are no mines, it hasn't been blocked per se.

We're just in control of who goes out of it. We'll continue to allow passage to everyone else, as long as they abide by our rules and we get some kind of security guarantees. So they're leaving a path that we can get out of, but it's one that would require a profound amount of humility to be accepted and swallowed by the United States—something we've never shown, in the last several decades, any real capacity for. So, you know, I worry about that. To answer your previous question, I don't think President Trump is really thinking this through and saying, "Here's my strategy. I want to ramp this up and see if I can out-escalate Iran."

That would imply he has forethought, that he's actually thinking things through like chess—two or three moves down the road. I don't think he's thinking anything beyond the end of his notes. I mean, I'm just being honest here. I think he's an action-reaction kind of guy: throw something on the wall, see if it sticks. If it doesn't, try something else. No thought to what would follow through, no thought to the ramifications, no thought to what the other side might do given your actions at all. He's kind of doing this mirror-image thing—"Well, if it was me, and somebody did this to me, and I was in the weaker position..."

I would probably do something like this. And I think he's ascribing that to the Iranians. I think he's attributing to the Iranians what the Venezuelans did, and he's thinking they're one and the same. So, it worked over here—why can't it work here? He mentioned Venezuela in his speech last night, which tells me it's still at the forefront of his mind. And that's a really dangerous place for that to be. But anyway, yeah, I worry a lot about this. And frankly, with a lot of the people he's got around him providing evidence and suggestions, it doesn't give me much hope that this is about to be wound down.

#Glenn

I spoke to Joe Kent, who said something similar—that the victory in Venezuela could have fueled some hubris in the White House and influenced some of the decision-making toward Iran. But just as a last question: Israel—if Trump wants to end it now or escalate, whatever he decides to do—what is Israel's interest at this moment? Because, you know, yes, they have a lot of censorship, and we don't know exactly what kind of hits they're taking. But do we know anything at all? I mean, what kind of situation are they in, and how does that translate into policy? Do they want to end this soon, or are they still waiting it out to see if they can break their opponents?

#Daniel Davis

You know, I don't see any evidence that the Israeli leadership has any doubts at all. I don't think they're wavering in the slightest. I think the punishment and the pain they're experiencing—they calculated that ahead of time. Whatever you may think of their morality, they're very intelligent, very

smart people. And they certainly knew what happened in the 2012 war. They knew that by starting this one, they were going to take a lot on the chin and that it would cause a lot of damage. I just think they factored that in, and they keep saying, "No, we can outlast the Iranians."

We can just put more pain and more pressure on them than they can on us, which seems kind of irrational to me. I mean, on the one hand, give them credit for being smart. But on the other hand, I'm going, seriously—a country of 93 million people with a lot of protected missile facilities, and you can't knock them down? Now, according to some Israeli press, as many as eight out of ten missiles are getting through the Iranians. You're this tiny little country of six million—do you really want to get into a war of attrition with the Iranians? So it seems kind of irrational to me, but I don't see rational reactions so far from the Israeli side. I think they're still saying, "No, we can get through it."

The fact that it's been just barely over a month—I just don't think they're willing to acknowledge reality or accede to it. So I suspect they're going to keep going, and therefore they'll keep putting pressure on Trump to do anything he can to not end this, because otherwise they'll say the sacrifice has been for nothing. "No, this is our chance, we've got to press harder." And I think that's why there's a very good chance you're going to see some kind of ground operation—just an unsubstantiated theory and hope that, well, that will put pressure on and then the Iranians will make a deal, etc. I mean, I don't see any evidence of it, but I think that's what they're thinking.

#Glenn

Sounds a bit like a strategy with Russia, but it's a strategy based on hope. Not a good strategy—but well, thank you for taking the time and sharing your insights.

#Daniel Davis

Always my pleasure, Glenn Diesen. Thanks for having me on.