

# Daniel Davis: Breaking News - Iran Reopens the Strait of Hormuz

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 Iran's announcement that it is reopening the Strait of Hormuz, yet the US decides to maintain the blockade on Iranian ports. While diplomatic developments are positive, the statements from the US and Iran do not correspond with each other. 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](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://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 again by Lieutenant Colonel Daniel Davis, a four-time combat veteran and host of the Daniel Davis Deep Dive YouTube show, which I'll link in the description. Thanks for coming back on. We're seeing a lot of developments—Iran has declared that the Strait of Hormuz is open, and Trump has apparently tweeted that it's open and will never be closed again, although he'll keep the blockade on Iran. So what exactly is happening? Is this peace, or might that be a bit premature?

## #Daniel Davis

Oh, it's way premature. There's a ton of things that still have to happen. Number one, Foreign Minister Abbas Ar-Rakshi this morning, when he announced that the Strait of Hormuz was back open again in accordance with the conditions set when they did the original ceasefire, said it was contingent on there now being a ceasefire in Lebanon. So they said, "OK, now that you did that, we're going to do this." And then he specified it was only for the period of the ceasefire, which expires, I think, U.S. time, midnight on Tuesday—Wednesday morning local time, I believe. So that only gives us a few days for it to be open. So nobody—none of these tankers, none of these companies, none of these countries—are going to just start sending tankers through the Gulf right now, I think.

Now, there could be some that are—probably ones that are already full and have just been floating around there. They'd probably love to get out. So you may get a few, but there's not exactly going to be a flood of people coming out, because none of the conditions have been met. Then you had, almost immediately, President Trump responding to an Axios report that said there's a deal on the table where the U.S. would pay twenty billion dollars for the reprocessed material. It wouldn't really

be characterized like that—it would be an unfreezing of Iranian assets in exchange for them delivering all of the four hundred-something kilograms of reprocessed sixty-percent material, and so on. Trump immediately put out another Truth Social statement saying, “Nope, no truth to that whatsoever.”

I'm going to get all of that reprocessed stuff. I will not give one dollar for it. We will not release any of the funds, and so on. That seems to take the oxygen right out of what could have been an opportunity, because the president had put a lot of pressure—he specifically pointed out that he put pressure on Israel to tell them to have this ceasefire. He said something like, “I told them to do it,” in all caps or something, and that they were just going to have to be quiet. I can't remember the exact phrase he used offhand, but he was definitely emphatic that he told Israel to do this, and then went out of his way to say it wasn't connected with the opening of the Strait of Hormuz.

I don't know if he just wants to take credit for it. They're like, “No, no, I did this on my own. It wasn't because of that.” I don't know. Abbas al-Rakshi said it was definitely because of that. In fact, the Iranian Foreign Ministry spokesman, Ibrahim al-Fakhar, said this is contingent upon the implementation of certain terms and conditions—that the ceasefire in Lebanon holds, and that if the naval blockade continues, it will be considered a violation of the ceasefire. So he's saying the U.S. can't keep its blockade open or it's going to be a violation. But President Trump said it would continue. He's saying the Strait of Hormuz is open for all the traffic we want out, but it's going to stay closed for Iranian traffic. So we'll wait and see how that's going to work out. But the Iranian side said even this is contingent upon three things.

He said, first, that the ships must be commercial and that passage of any military ship is prohibited, and that the ships and their cargo must not be linked to any belligerent states. So that's a pretty big limitation. The ships have to pass through the route designated by Iran, because apparently there are some mines there, and they want to make sure nothing gets hit. And then he said the ships must be coordinated with the Iranian forces responsible for that passage. As the U.S. Central Command confirmed before the war, the Iranian Revolutionary Guard Corps controls the Strait of Hormuz. So we'll see how this actually plays out, because both sides are saying very different things. Now, the oil market is thrilled—it dropped almost 12 percent immediately after these two announcements. But, you know, the devil's in the details, as they say, and these are pretty big devils.

## **#Glenn**

I agree. As always, it's sold us great optimism, and I think Trump is also good at talking down oil prices. But, as I said, it might be a bit premature. At the same time, we see that the Lebanon ceasefire is unlikely to hold, and there are also indications that the U.S. might be preparing for renewed hostilities. They're even talking now about a possible ground invasion. Do you think this is on hold now that, well, the negotiations seem to be moving forward? Or do you think this is, you know, just a little pause before we move on?

## **#Daniel Davis**

Everything is moving concurrently—there's movement in the diplomatic realm, there's movement in the political realm, and there's movement in the military realm. Everything is going forward as though none of the other efforts are going to succeed, and they'll execute whichever one seems to give their side the best chance. So there's no question—we've seen open-source reporting that the Iranian side has been doing all kinds of excavation. A lot of the tunnel systems we've hit, a lot of these mountainsides, a lot of these underground missile cities—they're doing reprocessing work.

They're also moving assets around, probably from one tunnel to another or something like that, to cross-level. They're getting ready for more. They're probably, as fast as they can, manufacturing more drones and more missiles—to the extent that they're able to. The U.S. is definitely doing the same thing. We've seen lots of air traffic, additional forces sent to the region, additional ships. So we're definitely continuing to build up, and every indication is— including the Secretary of War yesterday saying, "We are locked and loaded and ready to go when this ceasefire comes to an end." President Trump yesterday, in front of the White House, was specifically asked about what happens when the ceasefire period ends.

Are you going to resume hostilities? And without hesitation, he said, "Yes, definitely." Now, he's probably saying that to add negotiation pressure or whatever, but that's what he said. That's what the Secretary of War said, and this is what the U.S. military is doing. They've been rapidly and dramatically sending additional interceptor missiles and offensive missiles—whether that's the JASSMs, the Tomahawks, the SM-2s, or SM-3s. All kinds of weapon systems have been restocked so that, in the event the order is given, they'll reengage and continue the war from where it was. So everything has happened concurrently. And then, of course, the diplomats are hard at work.

Obviously, a lot of things have been going on behind the scenes. President Trump mentioned a number of Middle Eastern powers, thanking them this morning on Truth Social after he made that post, indicating that there's multilateral diplomacy going on—everybody's trying to find a way out of this. So the question is, which side is going to succeed? We've got such a narrow window. We're talking about four days before this comes to an end, unless the sides agree to extend it—which I think is probably a 75 percent probability, because both sides have some advantage in doing that, both in terms of more military preparation and more oxygen and space for negotiations.

But, I mean, again, when you see that the conditions being set by Trump and by the Iranian side on what it means for the Strait to be open are incompatible. So is one side going to give, or the other? Because otherwise the Strait isn't really open anymore if the two sides don't agree. And then, with the push and pull, we'll see on these trackers how many ships actually go out. Is there a flood of ships going out or not? I mean, so far, nothing is happening. But we've had a bunch of dueling social media posts, so we'll see what actually happens on the ground.

## **#Glenn**

But still, this contrast—and also this Truth Social post by Trump—they're being very explicit. Yeah, the Iranians have opened up: "We will not end our blockade." Again, it could just be a show of strength or an appeal to his own audience, because he really has to sell, more or less, a victory—that the U.S. is in the driver's seat. But in Iran, though, if they see this as a complete breach that doesn't fit within the wider agreement, do you expect them to follow through with this? Or why did the Iranians suddenly become so lenient, so ready to meet these demands?

## **#Daniel Davis**

Well, we'll see how lenient they are. I mean, that statement by their foreign ministry spokesman didn't sound very lenient—it sounded very limiting and very exacting. He said, "Either it's a two-way street or it's a no-way street." So that's why I say it's incompatible with what Trump said, because he said it's a one-way street—my way—and you're going to open up everything while I keep everything closed. But that's the opposite of what the Iranians are saying. So we'll see what actually transpires. Maybe it's not even open at all. Maybe this is just, like I said, dueling social media posts that don't translate to anything happening on the ground. That's a big problem here, because Trump has already been declared in.

Trump also said Iran promised they would never close the Strait of Hormuz again. He said they're definitely going to give us all of their "nuclear dust," as he calls it. No word on any of that from the Iranian side, so one has to wonder why. What is all of President Trump's confidence based on? Is he letting the cat out of the bag? Is he letting people know what's actually going on behind the scenes—and later on we'll find out that's true? Or is this just stuff he hopes is true, and he's trying to say, "If I say it enough, it'll become true"? Unfortunately, we've got experience with both of those kinds of things happening, so we don't know what that's going to mean either. Bottom line: there's a lot of verbal action, a lot of written words, but so far no physical action.

In fact, speaking of the U.S. blockade, I was looking this morning at one of those ship trackers that shows all the traffic going in and out of the Gulf. They did a kind of time-lapse of the last three days of the U.S. blockade, and it showed there were still a number of U.S.-sanctioned ships that had gone out of the Gulf. We claim that 13 or 14 ships had been turned back, but the graphic showed quite a few actually moving through the Gulf and out past the blockade line. So, I mean, you tell me—has it really been blockaded or not?

## **#Glenn**

I don't know. It's hard to tell. It's such a war of narratives that reality becomes difficult to see. But it does seem very unlikely that the Iranians would give up their nuclear material for nothing in return, because then they'd only leave themselves weaker and with a worse hand to play later on.

## **#Daniel Davis**

And, you know, I mean, I'll go so far as to say there's zero chance of that—that they're just going to hand that over. Unless they turn it over, there's going to be something substantial in return. I think the days are over when Iran just says, "All right, we'll do what we're told. We'll capitulate and submit in order to end the fighting here." I think what happened with Operation Midnight Hammer—the Israeli attack in 2025—and now this one has led them to conclude that it's pointless to ever trust the U.S. to do something willingly, or to think that by being self-restrained, that's going to restrain us. I think they now see it will only encourage us to do more later on, after we get more ammunition restocked or whatever.

So I don't think they're going to let that go. And it is a major problem—unless they get something pretty significant in return, something that has even a version of a security guarantee and some kind of reparation. So even when they're talking about opening up the Strait here, apparently that doesn't mean they're not going to be charging a toll, even for stuff they allow out. They still have to have that going on because they're going to try to make, you know, some revenue as well. But, you know, there are these signs and billboards all over buildings in Tehran—billboards showing a hand holding the Strait of Hormuz. And I think that's emerging as a symbol of their resistance and defiance, saying, "We have the leverage here."

And so the idea that they're just going to let that hand open and then stand back and go back to any version of what it was before is inconceivable to me. I just can't think there's any chance they're going to do that, because that—along with their missile force—has been the real demonstration that they have some real leverage here, and that they can't just be coerced anymore, because they've played that hand properly. I just don't think there's any chance they withdraw, though they'd be foolish to do so. And they haven't shown themselves to be foolish so far. So we'll see what they extract for any concept of giving away that reprocessed material.

## **#Glenn**

Well, it appears that the possibility of a ceasefire here—or prolonging it, or ending up with a permanent peace agreement—seems somewhat unlikely. I hope I'm wrong on this. I could be wrong. But if I'm not, we end up returning to these hostilities. What do you think that's going to look like? Because for a while, many people have said that a ground invasion of Iran seems like a foolish idea, given the geography, the size of the territory, and many other variables. But do you think a ground invasion could happen now?

## **#Daniel Davis**

No, there's no chance of it, because we don't have the capacity to do so. I mean, physically, we would need four or five hundred thousand total troops just to mount a credible possibility of a ground invasion—with the potential of taking those sites, taking the capital city, and so on. And the massive mountain ranges across the entire western part of the country make it about as close to a physical impossibility as you can get to have an army try to invade and move through. There are just

no routes you can come in from there. And even then, some have said, “Oh, see, this is why we shouldn’t have given up Afghanistan, because there are some plains and such—you could come in on the eastern side of the country.”

And you could roll toward the west. But even if you look at that, it's very constricted there—it would be like going through a gauntlet. It would be almost certain death to go through, because you'd be in a shooting gallery. They could hold the high ground on either side, so even that doesn't really hold up. Therefore, the only thing we have troops on the ground to do now is some kind of raid. Maybe you could take Kharg Island, but that would come at an extremely high cost and be tenuous at best. And I'd argue there would be no chance to hold it long term. It would be like when the Ukrainian side had that incursion into Kursk Oblast in Russia—they were able to do it for a period of time, and for, I think, seven months, they held some territory there.

But they were dead men walking from the beginning, because Russia—the whole country there—all they had to do was slowly squeeze the thing down. And that's exactly what they did. It would be the same thing here, even if we succeeded for the moment in taking Kharg or Bandar Abbas, for example, or any other point target anywhere on the coast. What would we have gained from that? Just like, what did the Ukrainian side gain from holding that piece of territory? It gained them nothing, and it cost them profoundly. It would be the same for us here. So yes, we have the capacity and the number of troops to conceivably try to take some territory, but it would be an ephemeral victory—not even a Pyrrhic victory. It would be a temporary tactical success that would breed a strategic failure. So there's no rational ground option at all for the United States here.

## **#Glenn**

So, given that this is the situation we're in, how do you see the possibility of actually ending this war, then?

## **#Daniel Davis**

Well, that is the problem, because as I see it, there are a few options that President Trump has, and all of them are bad. Once we embarked on this war, any kind of sane analysis would have shown, even in the concept phase, that there's no military solution here. There's no path by which you can compel compliance to get what you want—whether it's the assassination of the leader or a big shock-and-awe bombing campaign. The country is simply too big. As you've said numerous times, even on my show, it's about as large as a good portion of Western Europe, and the terrain is just terrible for an offensive there. So it was foolish from the beginning to think that you could.

But we did anyway. We went through with it, and now we are where we are. Whether we should or shouldn't have done it is no longer the question. The real question now is: what next? Because once you're already engaged and committed to a course of action, and you don't have a ground component to even threaten anything on the ground, the question becomes, what can we do now?

As I see it, there are three main possibilities. One is that Trump negotiates a settlement on terms that are minimally acceptable to the Iranian side. And, you know, their ten-point plan is the basis they're willing to talk from.

They're not going to get all ten of those. They don't have any illusions about that—it's their biggest wish list. But there are a few things on there that are probably non-negotiable. Control of the strait, or at least a "toll booth" kind of situation, is probably on the list. Some kind of security guarantees and reparations of some sort—whether that's unfreezing their assets or something else, like charging that toll—maybe those kinds of things. And keeping their missiles and their proxies. Those, I think, are going to be their non-negotiables, the things they have to get.

And Trump's going to have to agree to some version of that. He could dress it up any way he wants at home, but there aren't many people in his camp or in Israel who would stay quiet about it. I can imagine Israel doing whatever it took to sabotage things if he started moving down that path. The other option is that he could say, "All right, you know what, I'm going to double down." So when this period comes to an end—whether it's next Wednesday or they get an extension, whatever—at some point it's going to end. And then he says, "I'm going to double down, and I'm going to give you a firestorm like you've never seen before."

And I'm going to blow up everything—you know, all these targets, energy systems, infrastructure. We're going to rain down holy hell on you unless you comply with some version of our fifteen-point plan. And then he may say, "I'm going to try that, just to see if it works." Iran has been unequivocal about what they would do in that case. And so far, every time they've said something—since before this war started—that if you attack, we're going to do this, they've done exactly what they claimed. So there's no reason to think this wouldn't be the next one—that they'd respond in kind to the GCC countries, Israel, our assets in the region, and so on. It would be lights out for the oil industry for an extended period of time, regardless of whether the Strait of Hormuz is open or closed.

That's number two. And then I think maybe number three is he could say, "Let's just play the long game. I'm going to keep this blockade, and we're going to see who can suffer the longest. Can you suffer, because we're shutting down everything? We'll bring in new sanctions. We're going to have, as he called it, Operation Economic Fury. And then who can suffer the longest?" And he may calculate, "I think we can suffer longer than they can." That's a bad play. But as I see it, those are the three broad outlines. I don't see another viable alternative. And those are all bad for the United States. We could go into each one of them, but there's no good option. That's what we need to understand.

There's no good alternative—no victory narrative that can come out, no matter what words come out of President Trump's mouth. And they will, no matter what he does. But if he chooses, I think, option B or C, we're going to be in a world of hurt—and so is the world economically. So option A is the best of the ugly options. It gets things off the table and allows him to turn and focus back on the midterms. And, you know, like everything else, he'll eat a lot of crow here. He'll take a lot of

domestic heat, but there are so many other issues here in the U.S., and they'll turn to something else. He's good at changing the narrative anyway. That's what he should do. We'll see what he does.

## **#Glenn**

It does seem a bit strange to—well, given that you have a ceasefire in Lebanon as part of these negotiations, it essentially gives a veto right to the Israelis, because they can break it at any time and then the negotiations fall apart. But let's stay optimistic for a second. I hope that Trump picks a wise path and puts an end to this war. How much damage has already been done? Because the global energy situation is quite poor, and we're now seeing massive impacts around the world—and also with fertilizers. That's something that's really starting to worry me. I mean, how deep are we into these troubles?

## **#Daniel Davis**

Yeah, I had a former British commodore who's now an expert in the energy field since his retirement in the UK. He argued—and a number of economists have been saying this too, and we've shown some of them on our show recently—that Commodore Steve Jeremy said, "Listen, I think it's already baked in. Even if this ends next Wednesday and we have a miracle, a diplomatic miracle, we've already baked in, in his view, a recession because of the way the economic, energy, and fertilizer situations you mentioned all have compounding effects. Even if it does end next week, even if the strait completely opened up today, it's still going to hit us."

It's going to take months—at least a couple of months—to get all these tankers restarted and coming back. Five of the six GCC countries had already suspended or greatly reduced their oil production, physically stopping extraction because they ran out of storage space. So that has to be undone, and that's a much harder problem than it might seem. It's going to take some time for the flow to start again, even once the insurance companies say, "All right, we're willing to take the risk again," and the carriers themselves are ready to take the financial risk.

So there's a lot that has to happen, even once it's open, to finally get the flow back anywhere close to what it was on the 27th of February—many, many months into the future. That means all the problems already there are going to compound. I'm agreeing with you that the fertilizer issue may be one of the biggest ones, along with helium, because both have economic and food security impacts. People are planting right now—including in the United States, Asia, the Philippines, and Australia, from what I've seen—but they're doing it with less fertilizer than they need and at a higher cost.

And, of course, diesel too. All that's raising the cost of producing food. But then, when it comes time for harvesting in the fall, you're not going to get as much. So that's going to create a scarcity. And that scarcity will last until the next planting season. These are problems that are going to have effects many, many months from now—into next year, at least. And all of that together could cause

a potential economic recession, a global recession. If this doesn't get solved soon, we could even be facing the possibility of a depression.

## **#Glenn**

Yeah, no, it's—well, in retrospect, after this war is over, there'll be no way of looking back at it and considering any of it a success. But it's still worth being at least a little optimistic about the efforts being made.

## **#Daniel Davis**

Believe me, I want to be optimistic as well, because any diplomatic space that's been created here gives us a chance to get this over with so we don't face the worst of those consequences later on—and that should be enthusiastically supported. And I definitely do. But being realistic, we're still going to be in trouble. There's no good way out of this, and there's no way to escape it without some problems. The question is, how big will those problems be?

## **#Glenn**

Well put. That's what I was trying to say. Thank you so much for taking the time. I know you have to run, so thanks again.

## **#Daniel Davis**

I do, yeah. Thanks so much. I always appreciate you, Glenn Diesen. Thank you.