

HORMUZ, NIXON'S GHOST, AND  
PRESIDENT JACKSON'S OLD  
MACHINE

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*A Hormuz crisis arrives not as a fuel story alone but as a multi-input shock through fertilizer, sulfur, helium, LNG, shipping insurance, and crop calendars; and since repair time exceeds election time, the story must be repaired instead. Nixon supplies the temptation to suppress the price signal; Andrew Jackson supplies the older apparatus of bounded folk community righteous in its own eyes; Manifest Destiny supplies appetite sanctified as Providence. Trumpism joins the three: shortage becomes spectacle, spectacle becomes racialized blame, blame becomes administrative permission. There will be no formal price board because the enemies list will do much of the work. Racism in such a regime is not merely moral rot but a routing protocol—a low-dimensional projection of a high-dimensional failure onto a face the state can act against.*

I have been warning for some time that a real Hormuz crisis would not arrive only as a fuel story. Fuel is merely the part of the logistics apparatus that low-information voters can see from the roadside, with a price sign large enough to penetrate cable-news theatrical fog. The deeper failures come through fertilizer, sulfur, sulfuric acid, helium, LNG, naphtha, LPG, petrochemicals, shipping insurance, crop calendars, chip fabs, automotive modules, and the miserly little logistical details by which civilization proves that it is physical after all. But the political failure will not be physical. In America, shortage does not stay a neutral systems problem for long. It seeks a villain, and under Trumpism the villain will not merely be economic. It will be racialized, foreign-coded, urban-coded, border-coded, and made treason-adjacent. Some of the defenders against treason will wear Sam Browne belts, and others will hide their tat-

toos.

Nixon is the right ghost, but not the only one. Nixon gives us the example of temptation to suppress the price signal when the public becomes angry. President Andrew Jackson, in office from 1829 to 1837, gives us the older American apparatus: define the true people, define the obstructing alien, and turn coercion into restoration. Jacksonian politics is not simply rough populism in a homespun coat. It is the politics of a bounded folk community, righteous in its own eyes, injured by distant powers, betrayed by elites, and entitled to remove whatever stands between grievance and possession. In its original form that meant Indian removal, conquest, and the enlargement of white political belonging by shrinking the world of those outside it. In its later form it acquired the language of Manifest Destiny, that national hallucination by which appetite spoke as Providence. In its modern form it wears a suit, a flag pin, a combat-branded vocabulary, and a television producer's sense of lighting, but the operating grammar is recognizable enough.

I do not expect Nixon-style wage and price controls. There will be no grand national freeze with a clean label, a lectern, and a price board. That costume is too obvious, too historically incriminating, and too easy to mock. The more likely response is subtler and dirtier: controls by a thousand bricks, each brick presented as farmer protection, consumer protection, national security, anti-gouging enforcement, domestic resilience, or punishment of enemies. Nixon tried to command the price board. The modern version will command behavior, by subsidy, waiver, investigation, export restraint, reporting mandate, allocation order, patriotic jawboning, emergency permitting, margin scrutiny, and the staged discovery that the shortage was caused not by a damaged input web, but by enemies. This is how the wall gets built. Start expecting another and another and another brick added to the wall.

That list of enemies is not decorative. It is the control surface.

That is the cold engineering point; racism is not just moral rot, though it is that. It is also a simplifying algorithm. It reduces a high-dimensional failure into a low-dimensional target. Sulfur, helium, ammonia, LNG, naphtha, war-risk insurance, tankage, refinery slates, shipping contracts, and crop calendars become a face on television. Once the shortage has a face, the state can act against the face. Low-dimensionality is a proven working strategy for moving low-information voters.

The common mistake will be to call the whole phenomenon “inflation” and stop thinking. Classical demand inflation says too much money is chasing too few goods. A Hormuz-input shock is fundamentally different. It is not chiefly that consumers are too rich. It is that the dependency network is damaged. If urea is missing when farmers need nitrogen, cheaper urea in October does not repair the lost yield from the tortured spring planting. If sulfur supply tightens, the injury will appear as phosphate fertilizer trouble, copper-leaching constraint, nickel processing difficulty, battery-material delay, and defense-industrial brittleness. If helium is constrained, the public will ultimately see the effects of chip allocation, MRI service delays, fab scheduling trouble, automotive modules arriving late, and another sermon about supply chains from people who discovered logistics yesterday and are dimly becoming aware of where stuff comes from. The price is real, but it is not merely a monetary signal. It is a damage signal from a starved industrial metabolism. Starving animals metabolize their own muscles, and then start to flail at escape strategies.

This is where a cold-eyed engineer looks at the cybernetics. A society under stress is a feedback system with damaged sensors, delayed signals, noisy channels, panicked controllers, and actuators that do not always touch the thing they claim to regulate. Price is one signal.

Inventory is another. Insurance is another. Crop timing, port congestion, refinery slate, sulfuric acid availability, helium purity, and chip allocation are all signals too, but they are not equally visible to the public or equally useful to politicians. When the crude public gauge screams “prices,” politics reaches for the control lever nearest the gauge, even if the real fault lies three layers down in chemistry, routing, risk, and time. This is how governments become proud of adjusting the thermometer while the boiler cracks. Expect steam clouds, occluding clear vision.

Two broad Hormuz scenarios now seem most probable. In the first, the Strait remains a friction zone for months. It is not closed like a door, but poisoned like a well. Some vessels transit, while others wait. Convoys form, and experience losses, much like the Battle of the North Atlantic in WWII. War-risk premiums stay high, and are not acceptable in terms of business as usual. Crews, charterers, and underwriters hesitate and pause. Bypass infrastructure becomes a target class. A Western map with pipeline arrows says “workaround.” Iran reads the same map as a target list, and acts to choke off molecules in movement. In the second, the Strait “re-opens” as a managed permission system. Friendly, tolerated, Chinese-linked, humanitarian, or politically useful vessels move. U.S.-linked, Israeli-linked, and hard-allied traffic remains more expensive, delayed, exposed, damaged, and sometimes sunk. The waterway becomes less a neutral artery than a checkpoint, one with spreading oil slicks. This may look calmer on television than open closure, but it is strategically more corrosive. Freedom of navigation becomes conditional access. If Chinese-linked traffic moves more reliably than U.S.-aligned traffic, the United States may reopen the water and still lose the Strait, because the commercial rule-set has changed underneath the naval facts. This provokes tectonic economic shifts.

These two scenarios differ logistically, but they converge politi-

cally, in American political spectacle. In both cases, prices rise, goods fail to arrive in the right place at the right time, and the administration cannot manufacture urea, sulfur, helium, jet fuel, tankers, insurance, or crop time fast enough to satisfy the electoral calendar. So it will manufacture action. When action cannot repair the system quickly enough, it will manufacture enemies.

There is not one OODA loop here, but a nest of loops, coupled, delayed, and deliberately entangled. Boyd's OODA loop is usually summarized as Observe, Orient, Decide, Act, but that summary is too tidy. The crucial stage is orientation: the internal model by which an actor decides what the observations mean. If I can feed you misleading observations, slow your tempo, force you to look at the wrong signal, or make you interpret the right signal through the wrong story, I do not need to defeat every action you take. I can make your action arrive late, hit the wrong target, or strengthen my position by your misfortune.

That is the subtlety here. Iran observes naval deployments, insurer behavior, Gulf infrastructure vulnerability, Chinese demand, and American electoral pressure; it orients around the fact that commerce is easier to frighten than a destroyer is to sink; it acts just enough, by harassment, permission, denial, or secondary strike, to keep the commercial loop unstable. China observes the same system and orients not toward theatrical closure, but toward privileged access, discounted cargoes, diplomatic brokerage, and the quiet acquisition of leverage. U.S. firms observe scarcity, policy threat, and reputational danger, then orient toward hoarding, substitution, lobbying, rerouting, and compliance theater. The administration observes voter anger and campaign danger, then orients not only toward repair, but toward spectacle, coercion, and blame. Voters observe prices, delays, and edited images, then orient through fear, identity, and resentment. These loops are not independent. One actor's action be-

comes another actor's observation; one actor's propaganda becomes another actor's orientation; one actor's precaution becomes another actor's price signal. That is what I mean by entangled.

The real struggle is therefore not just military men theatrically straining muscles over the Strait. It is over minds and orientation, meaning over the public model of what the crisis is. Is this a coupled input shock, a maritime-insurance failure, a fertilizer calendar problem, a sulfuric-acid problem, a helium-and-chip problem, a managed-access problem, or a morality play about enemies robbing the true people? Once the public orientation is captured, decision follows. Once decision follows, action becomes administratively possible. Boyd would recognize the maneuver: collapse the opponent's understanding before the opponent can act coherently. In this case, the opponent is not merely another state. It is the American public's capacity to perceive the system as it actually works.

The true foreign adversaries are not difficult to name. Iran seeks leverage from geography, missiles, drones, ambiguity, and the fact that global commerce is allergic to uncertainty. It need not defeat the U.S. Navy in open battle if it can keep underwriters, charterers, and procurement officers disoriented. China seeks advantage from asymmetry: preferential access, commodity arbitrage, diplomatic brokerage, weakened U.S. credibility, and the conversion of maritime neutrality into political permission. Russia and other opportunists will enjoy any U.S. distraction, any inflationary pain, any allied fracture, any commodity-price distortion, and any spectacle that makes liberal democracies look ungovernable. These are adversaries in the ordinary strategic sense, though ordinary strategic sense is now a rare commodity, not yet subject to export control only because no one has found a way to mine it. Perhaps one day it can be taught, though the grant proposal would currently be rejected as too woke.

The domestic adversaries are more delicate to name, because some will be hidden inside legitimate institutions and some will be real firms responding rationally to bad incentives. There will be actual gougers, actual hoarders, actual political profiteers, actual executive cowards, actual middlemen exploiting opacity, actual campaign operators turning pain into racial theater, actual officials using emergency powers to build discretionary control, and actual media creatures who prefer villains to mechanisms because mechanisms are bad television. The danger is not that every accusation will be false. That would be easier. Politics feeds best on partial truth, because partial truth gives the lie a spine. A local villain becomes the rhetorical key by which the state unlocks general coercion.

This is the Jacksonian rhyme, and Manifest Destiny lurks in it as more than historical cologne. Jacksonian politics does not merely ask, "Who governs?" It asks, "Who belongs?" Manifest Destiny did not merely say the United States would expand; it said expansion was rightful, natural, providential, and obstructed by peoples whose removal became proof of progress. When I hear the Trumpist register, and especially the muscular, sanctified, martial cadence now fashionable among its warriors and television adjutants, I hear that old mechanism muttering underneath the modern words. The frontier has moved from land to supply chain, border, sea lane, port, university, refinery, data center, farm, and administrative state, but the claim is familiar: the true people are entitled to unimpeded possession, and whatever blocks possession is not a constraint to be understood, but an enemy to be cleared. Herrenvolk politics matter, even if the dear leader is not actually one of the true, but cosplays badly.

A Hormuz-driven shortage gives this grammar fresh material, historically. The names should not be elided. The rhetoric will not merely gesture vaguely at "outsiders." It will find Somalis when it needs a Black, Muslim, refugee-coded urban target; Latinos when it

needs a border, farm-labor, cartel, trucking, meatpacking, or welfare target; Jews when it needs financiers, media, universities, NGOs, “globalists,” commodity traders, or shadow networks without always saying the old word aloud. Arabs, Iranians, Chinese, South Asians, foreign students, African immigrants, and Black cities will be pulled into the same circuit as needed. The exact target will vary with the commodity and the news cycle, but the function will remain stable: turn an input shock into an alien presence, then turn policy violence against that presence into defense of the true people. Hats are available, manufactured by the lowest overseas bidder.

Fuel pain will be narrated as hostile foreigners, disloyal exporters, speculators, and treasonous elites who prefer lattes to drip. Fertilizer pain will be narrated as foreign control, chemical cartels, anti-farmer middlemen, environmental obstructionists, and leaders who let America depend on enemies. Food pain will be narrated as foreign-owned packers, migrant disorder, urban theft, grocery gougers, and corrupt middlemen. Chip and helium pain will be narrated as China, suspect universities, foreign students, disloyal engineers, AI billionaires, and companies feeding machines while hospitals and families wait. Metals and sulfuric acid pain will be narrated as China, green ideology, permitting saboteurs, and blue-state obstruction. Automotive delays will be narrated as globalist automakers, foreign chips, bad trade deals, offshoring, and executives who took subsidies while failing to serve Americans first.

In a shortage regime, racism is not only a prejudice. It is a routing protocol. It tells anger where to go, and it tells agencies where to look. It tells prosecutors whom to investigate, inspectors whom to raid, universities whom to suspect, companies whom to threaten, ports whom to scrutinize, and voters whom to forgive. It teaches the crowd that Somalis are not neighbors but invasion, that Latinos are not workers but cartel extension, that Jews are not citizens

but hidden coordination, that Chinese students are not students but espionage, and that Black cities are not polities but disorder. It sorts the world into the innocent folk community and the contaminating outside force. That is why this cannot be treated as a detachable moral outrage, as is common among liberals. It is part of the process by which scarcity becomes authority. Many progressives miss this because they treat racist rhetoric as expressive superstitions rather than operational politics. They hear the ugliness and respond morally, as they should, but then fail to ask the colder question: what work is the ugliness doing inside the system? How does it succeed? It is not merely making supporters feel superior. It is compressing causality, assigning blame, licensing selective coercion, and turning logistics failure into a loyalty test. And it directs effort, money, attention, and action in the polis. It matters whose supporters are bearing the pitchforks.

The midterm effect will therefore not arrive only as policy. It will arrive as spectacle. The explosions are the pilot episode: burning terminals, drone video, missile trails, convoys, ships waiting outside a dangerous Strait, and cable maps with red arrows, as if Hormuz were a board game for anxious adults. That spectacle explains why something bad happened elsewhere, but it does not yet tell voters whom to punish at home. For that, the showrunners need domestic characters.

These showrunners are not only campaign consultants, though they will cut the thirty-second spots. They are also the White House communications shop, friendly governors, USDA, DOJ, Commerce, Energy, Homeland Security, allied committees in Congress, Fox, talk radio, social-video propagandists, influencer pastors, commodity-trade spokesmen seeking protection, corporate lobbyists seeking exemption, and a swarm of lesser remoras who know that every crisis creates a stage. They will not all coordinate like a writers' room with a

corkboard. They will converge because the incentives point in the same direction. Pain must become story, story must become blame, and blame must become permission to hurt.

The first trope has already arrived, and it is the farmer. That is notable because the farmer did not appear in force at the first closure. The system needed almost two months for the input shock to migrate from maritime fact into agricultural grievance. I saw that coming at the first closure because fertilizer is not an optional consumer good; it is a crop-calendar input. But the spectacle could not begin with sulfur, urea, ammonia, or LNG feedstock. Those are not television characters. The white farmer is. He is the first serious domestic icon because he performs innocence, production, rootedness, masculinity, continuity, and national legitimacy in one image. The spot practically writes itself: cap, field, empty fertilizer bin, diesel receipt, family kitchen, flag, and a voice saying that foreign cartels and Washington elites are making it impossible for real Americans to feed the country. This came to screens in spring planting season.

The second trope, which will intensify through early and mid-summer, is the household injury: the mother at the grocery check-out, the family cancelling a trip because airfares are obscene, the rancher squeezed by feed and diesel, the small-town mechanic waiting on a part, the elderly patient whose MRI appointment is delayed because helium has become scarce. This trope is more useful than the farmer because it migrates the pain from “their farm” to “your house.” It turns fertilizer into groceries, jet fuel into cancelled travel, helium into medical delay, chips into repair failure, and petrochemicals into packaging weirdness. The viewer is not asked to understand the dependency map. The viewer is told to feel cheated.

The third trope, late summer into September, is the enemy montage. This is the dirtiest and most effective layer: Iranian missiles, Chinese ports, migrant crossings, Somali faces made to stand for

invasion, Latino workers made to stand for cartel reach, Jewish financiers and university donors made to stand for “globalist” coordination, Black city footage made to stand for disorder, suited executives, university gates, foreign flags, data centers, container ships, perhaps an environmental lawyer, perhaps a port crane, perhaps a refinery flare, perhaps a faceless trader’s screen. The montage will not prove causality, because proof is not its job. Its job is adjacency. It teaches the limbic system that the same enemy is everywhere: abroad, at the border, in the city, in the university, in the corporation, in the supply chain, and in the price on the shelf. This is the society of the spectacle in farm cap and combat boots: the real crisis is replaced by its governing image, and the image becomes more politically operative than the causal network.

The fourth trope, likely most intense from September to Election Day, is the fighter narrative: Trump, or candidates running under his sign, standing between the true people and the enemies who are starving them, overcharging them, delaying their cars, grounding their flights, and corrupting their country. By then the policy brickwork can be shown as action: investigations, subpoenas, waivers, emergency purchases, export scrutiny, allocation rules, farmer relief, refinery meetings, threats against “gougers,” and patriotic demands that American supply serve Americans first. None of this needs to be called price control. The spectacle will have taught the public to understand it as defense.

The likely political calendar is therefore plain enough. May and June are the farmer phase, with fertilizer relief, import waivers, domestic-production announcements, antitrust language, and the first serious ads built around the betrayed producer. This is the phase already visible, arriving almost two months after the first closure because the public had to be led from fuel into fertilizer. June and July are the household-injury phase, as fertilizer becomes food anx-

ity, jet fuel becomes travel pain, diesel becomes trucking and farm stress, and helium begins to acquire a medical and semiconductor face. August is the conversion phase, when separate shortages begin to be edited into one story of betrayal: China, Iran, foreign suppliers, corporate gougers, migrants, cities, universities, speculators, environmentalists, and elites. September and October are the full spectacle phase, when campaign advertising and official action converge. By then the administration will not merely be saying it is helping farmers. It will be naming enemies, staging enforcement, demanding loyalty, and presenting each control brick as a blow struck for the true people. Ham sandwiches will be indicted, along with white-collared men suddenly discovering the Bible and Jesus.

This calendar matters because repair time and election time are mismatched. A fertilizer plant promised twelve or eighteen months from now is not nitrogen in a May field. A permitting announcement does not put sulfur into an acid plant. A domestic-resilience speech does not move a cargo through an insured maritime corridor. A chip-fab allocation problem solved in procurement language does not repair a voter's truck in October. When the repair interval exceeds the election interval, the story must be repaired instead.

This is how reality gets manipulated without becoming wholly fictional. The real shortage is retained; the real pain is retained and amplified with sobs. The real bad actors are selectively retained; some will pay the bribes, and be sanctified. But the actual causal map will be a book burned in the public square. TV, YouTube, Instagram, X, and blog viewers are never to be shown the dependency network. The viewer is shown a face, then another face, then a flag, then a price, then a promise of punishment. Farmers really will be hurting. Fertilizer will be expensive, or unobtainium. Food prices will rise. Some markets really will concentrate into new monopolies. Some firms will gouge. Iran and China of course exploit the crisis. All

this will be true, but the manipulation lies in the edit, that dark art by which partial truth is arranged into political falsehood and then sold back to the injured as clarity.

Now the evolutionary correction. Under stress, systems do not merely compete; they cooperate, fuse, parasitize, scavenge, and invent new dependencies. Symbiosis is not niceness. It is survival under constraint. The Hormuz shock will produce new alliances because the environment is becoming less forgiving. China and Iran may deepen a practical symbiosis around transit, oil, fertilizer, sulfur, and diplomatic cover. Gulf states will cooperate uneasily with both Washington and Beijing. Farmers' cooperatives will become procurement organs. Hospitals, fabs, defense contractors, automakers, and industrial-gas suppliers all will form priority coalitions, with attempted exercise of monopoly powers. Federal agencies that usually pretend to have separate missions will begin to fuse agriculture, justice, commerce, defense, transportation, energy, homeland security, and intelligence into one emergency metabolism. These latter will careen as poorly as the usual clown cars of the Trump administration.

Some of this cooperation will be constructive. Shared inventory visibility, cargo coordination, substitution, repair triage, honest prioritization, and mutual aid can reduce damage. But stress also increases predation. Firms with stock will extract terms. States with chokepoints will demand obedience. Carriers with safe passage will charge rents. Political actors with frightened voters will harvest anger. Media systems will turn pain into attention. Administrators with emergency authority will accumulate discretion and exert abuses. Campaigns will turn attention into permission. The emergent thing is not the shortage itself; the shortage follows known physical dependencies. What is emergent is the new political ecology forming around it: cargo, insurance, identity, emergency authority, racial-

ized spectacle, and allocation power meshing into a permission regime. And new enemies, same as the old enemies.

What is not emergent is equally important. It is not emergent that politicians blame outsiders. It is not emergent that Americans racialize scarcity. It is not emergent that emergency power seeks enemies. It is not emergent that underwriters become invisible sovereigns when ships must move through war. It is not emergent that propaganda prefers a face to a feedback diagram. Those are old gears. What is emergent is their present coupling, their timing, and the way the Hormuz input shock lets Nixon's price-control temptation, Jackson's bounded folk community, Manifest Destiny's appetite sanctified as destiny, Debord's spectacle, Boyd's orientation fight, Wiener's damaged feedback loops, and Margulis's stressed symbioses all mesh in the same machine. If that sounds overdetermined, it is only because reality has the bad manners to be more complicated than punditry.

The policy follows the showrunners' edits. Once fertilizer firms are cast as starving American farmers, investigations and pressure become farmer protection. Once meatpackers and grocers are cast as stealing from families, margin scrutiny becomes justice. Once exporters are cast as shipping American abundance to foreigners, export controls become patriotism. Once underwriters and traders are cast as paper parasites, risk pricing becomes sabotage. Once chip-makers and AI firms are cast as feeding machines while hospitals wait, allocation becomes national morality. Once universities and foreign students are cast as suspect nodes in the China problem, visas and research restrictions become supply-chain security. Once migrants and cartels are folded into food, trucking, warehousing, and border trade, raids become economic policy. Once environmentalists are called saboteurs and terrorists, permitting shortcuts become survival. This is not a set of disconnected policies, but a cybernetic

conversion of grievance into administrative force. It is well begun.

That is the modern Nixonism: not a price board, but a permission regime. Not “wages and prices are frozen,” but “these are the people hurting you.” Not a formal freeze, but a politics in which the price tag, the cargo manifest, the visa, the contract, the export license, the fertilizer shipment, the chip allocation, and the grocery margin all become evidence in a loyalty trial. The price need not be formally controlled if every actor understands that the wrong price, wrong shipment, wrong customer, wrong margin, wrong nationality, wrong research partnership, or wrong public statement can put them on the screen next week.

I keep returning to Nixon, Jackson, and the enemies list. The list is not merely rhetoric. It is the bridge from spectacle to administration. Nixon reminds us that frightened governments are tempted to suppress the price signal when the public becomes angry. President Jackson reminds us that American populism, when it curdles, defines a true people and then searches for aliens, dependents, traitors, and obstructions to remove. Manifest Destiny reminds us how easily appetite hires Providence as counsel. Trumpism joins the three: it turns shortage into spectacle, spectacle into racialized blame, and blame into administrative permission.

There will be no formal price board, because the enemies list will do much of the work. Once fertilizer gougers, foreign-owned packers, exporter-profiters, paper speculators, AI chip hoarders, globalist automakers, environmental saboteurs, Chinese manipulators, Iranian aggressors, migrant criminals, urban parasites, disloyal universities, suspect engineers, Somali invaders, Latino cartel extensions, Jewish globalists, Black disorder, and whatever other racialized or foreign-coded villain the week requires have been marched across the screen, the policy instrument is already half-built. The accusation becomes the actuator. The missing molecules become treason-

adjacent. The price tag is not frozen by decree; it is ordered, by threat and spectacle, to stop embarrassing power.

Manifest Destiny taught appetite to speak as Providence. The modern version will teach coercion to speak as necessity. The Conestoga wagon has become the cargo manifest, the frontier has become the supply chain, and tribal removal has become allocation, investigation, deportation, waiver, and raid. This, they will tell us, is our destiny.