

# John Helmer: Netanyahu's Videos: STAGED?

The interview argues that recent videos of Benjamin Netanyahu look staged or manipulated, raising doubts not just about his visibility but about whether he still controls events behind the scenes. It frames Israel as strategically weakened, unable to achieve its war goals against Iran, while the U.S. is portrayed as seeking a fast negotiated end to avoid a wider energy and military crisis. The discussion also claims Iran now holds major leverage through Hormuz, while NATO and Europe appear divided, hesitant, and unable to shape the conflict decisively.

## #Nima

There are rumors about Benjamin Netanyahu. It seems that recently he hasn't been participating in security briefings in Israel. Then we saw two or three videos of him, and most people are saying those are AI-generated videos, not real ones. What's your understanding of the situation around Benjamin Netanyahu?

## #John

It's very important. Speaking from a Russian point of view, you know, when an individual like Mikhail Gorbachev is subject to detention or arrest, and there's a putsch going on in the capital, the first thing you do is make sure he's still alive—and you do that by telephone, among other things. That was a long time ago, when the putsch was attempted against Gorbachev, to verify that he was alive and talking. Second, with respect to Netanyahu, there have been three video clips intended to show he's alive. The first was the so-called "six-finger" video, where he makes a speech, and the AI analysis shows all sorts of manipulations.

Because that failed to be convincing—either that he was alive or in command, and we'll come back to the difference between those two things in a minute, because they're strategically significant—he did the coffee cup video. The coffee cup, or coffee shop, video has been analyzed. I've seen it. Millions of people have now seen it. You've seen it. It shows several AI fabrications. And speaking from a Russian point of view, we're used to fabrications. Yeltsin's features were often fabricated with cuts—you could see the cuts. And in this particular case, you can see cuts. First, when he drinks from the coffee cup, you see that he doesn't swallow. You can't drink coffee and not swallow it.

And you see a cut in the clip between the moment he sips and the moment he swallows. It's a fabrication. Second, as many people have noticed, the surface of the coffee and the design of the cappuccino don't change even after he's begun drinking from it. That's the second one, and it's suspect. The third one is—let's call it the "girly video." That's where he goes to a site and begins talking to girls, to several women. You see a couple of bodyguards around him and so forth. Again, the object is to show he's alive. However, if you look carefully, you see he's wearing the very same

jacket he wore in the coffee shop video, which was screened a day before—more than 24 hours before—if you look at it very exactly.

## **#Nima**

John, do you want me to play it for you? I don't know.

## **#John**

I think everybody's sick of them. And I want to come to a bigger point. What you can see is that the zipper on his jacket is in the same position as it was in the coffee shop a day later. Not possible. It's not normal. Now, what do these things show you? It may show you he's still alive. It definitely shows you that Netanyahu wants to show the world that he's alive. But what he doesn't show you—and that's the point you began with—is that he's no longer in command of Israel. Prime ministers don't show that they're in command of a war, let alone an economy. The normal prime ministerial operations, he's not showing. Why do you show a coffee cup and two girls when you are really in command? Now, what does it mean if he's alive but not in command?

This is a very interesting problem, and Netanyahu's videos—whether they're AI fakes or not—show he's not in command. Therefore, the question arises: has there been, or is there ongoing, a form of putsch in Israel? This is a very serious development. And I can't add much from what my Russian sources say, because those who know aren't talking, and there's more suspicion and guesswork than reality. But let's step back a minute and look at the strategic issue. Why would there be a putsch now against Netanyahu? Or why would he be afraid of one and aim to show, at this point, that he's walking around freely and therefore in command when he's not? Answer: in many respects, as your colleagues and my colleagues show, Israel is now defenseless. As Ted Postol explained on your program last week, it's unable to achieve its principal war aim against Iran.

Let's say it's genocidal against Iran, but in military terms it means that Israel's principal war aim is to prevent Iran from ever having not only nuclear warheads but also conventional warheads on ballistic missiles with the precision to destroy Israel. Ted Postol's data really convinced me—and should convince us all—that, without exaggeration, Iran's retaliatory capacity, something we've been talking about for months, is surviving. It survives to the extent that Israel loses its war aims. The U.S. is different, and I disagree with those who think that Israel is running Trump or running this war. It's always the other way around, but it suits many administrations, for election and other purposes, to make it appear that Israel comes first. And it's reasonable for the Iranian foreign minister and others to deride U.S. policy as "Israel first."

But now what we have is a serious turning point, in which the U.S. is facing a longer war than anticipated. Israel is facing a war that cannot—cannot—end the existential threat it faces from Iran. In fact, it now faces a stronger threat than Israel has ever faced before. What's to do? Answer: we've talked about this before, I've written about it in *\*Dances with Bears\**, and others are seeing it

too. Israel will reach for tactical nuclear weapons if it runs out of all other alternatives. And from the way he behaves, the way he thinks, the way he speaks, Netanyahu is an advocate of tactical nuclear warfare against Iran.

The question is: is the United States—the Trump administration, the “Israel firsters” around Trump, the Pentagon and the Joint Chiefs of Staff, the CIA, and the so-called deep state—are they all in consensus on whether the U.S. wants Israel to use tactical nuclear weapons? I’d say, on balance, the U.S. does not want Israel to try that, and is now looking for ways first to shorten the war. Let me add a few points about the timing—there’s not much time. Let’s just go to the question of time, if you don’t mind, and stop me if I’m wandering away from your question. We know, from two bits of evidence, that the Americans want this war to be over in approximately two weeks. Why do we know that?

Because Trump told Steven Mnuchin, the Treasury Secretary, to work out yesterday in Paris with the Chinese that he will not be going to Beijing for a really important summit meeting scheduled for March 31st to April 3rd, because he has to stay home to run the war. But this wasn’t what the Chinese had agreed he would do a few days ago. Remember last week, we talked about the Chinese foreign minister, Wang Yi, endorsing Trump to show up on March 31st in the middle of a war. We thought that was disadvantageous, to say the least, from a PR point of view for the Chinese—to be welcoming a war-maker at that time. But it’s Trump who wants to be in Washington on March 31st. So that’s two weeks away from today. He thinks he might be needed in Washington to run the war.

No, it’s to run the negotiations to end the war, with a larger group of advisers than could fit on a plane to China—or could be securely involved in discussions if Trump were in China. Second, Scott Bessent, in yesterday’s interview after meeting with Pei Li-Feng and Li Chenggang, the two Chinese negotiators, gave a very interesting press conference. First, he explained that the Chinese and the Americans failed to reach any significant tariff agreements in Paris that they could present to President Xi and President Trump for approval at a summit. That’s one issue. Second, Bessent—and I’m looking down at my notes to get this right—was asked, how much oil is there in supply?

How quickly are you prepared to give sanctions waivers to the Russians? What do you see as the timing of the oil supply? Now, Bessent—it’s worth understanding—laid out some of the obvious arithmetic. Twenty million barrels of oil come out of Hormuz; if nothing comes out, only a small amount can be diverted by the Saudis to Yanbu and shipped through the Red Sea. That’s if the Gerald Ford can protect the Red Sea, and that’s if the Houthis don’t start closing Bab el-Mandab, which they might do if Iran and the Houthis agree on that point. So what Bessent says is, and I’m reading here, it looks like the deficit is about 10 to 14 million barrels a day—and that’s before any of the ships start coming out of the straits.

Then, if you think about the Russian oil, he’s talking about the floating Russian oil—oil in tanker storage offshore: offshore India, offshore China, offshore many places. That’s been given a waiver to sell and unload until April 12. That’s said to be between nine to twelve days of supply without the

market moving. Then he talks about the additional strategic reserves. What he's being pressed to answer is: how much oil do you think can be supplied to the market before there's a strategic disruption? And therefore, how long can the world put up with the closure of the Hormuz Strait? The assumption for everyone is that Trump's notion of opening the Hormuz Strait against Iran has failed.

It has failed before it started, and it fails without minds. Iran has become the gatekeeper of the world order—the global oil supply. This is really important. Gatekeeper, folks—that's the phrase, a word to remember. So Bessent is telling the world, we think we've got about 14 more days of surplus at sea. Beyond that, he knows Russia can produce about 500,000 more barrels a day into the market. A certain amount can come out of Venezuela. But from what Bessent says, he thinks the oil shortage will last only another two weeks. That means he thinks the U.S. will be able to negotiate with Iran the terms of an end to the war, which will reopen Hormuz—which means, to corroborate Trump's travel plan, the Americans think the war will last another two weeks.

Now, let's suppose that's right. Nobody has to believe me—that's what they say. Let's suppose they're right. If they are, we now have two weeks in which the Americans are looking to negotiate in order to hold those openings. On the other hand, the Israelis want to destroy Iran within two weeks, and it can't be done—at least, they think, not without nuclear weapons. So who is pushing against the American idea of reopening Hormuz and ending the war by March 31st, or thereabouts? The answer—who's pushing against the Americans? It's Netanyahu. Netanyahu. What do the Americans think then? I believe it's reasonable for our audience—for you, for the Iranian side, and for everybody else—to figure that Netanyahu makes a very convenient scapegoat for an American-negotiated end to the war.

## **#Nima**

Why?

## **#John**

First of all, he's already the leader of the Israeli war faction. And many Jewish communities who oppose the war but remain Jewish want to say that Netanyahu is the rotten apple in the barrel. Let's leave aside that we don't agree with that—that's what they say. We can also pick up, I'm reaching for it, Ayatollah Moshe Chabaz Khamenei's speech. There are three main points that are, let's call them, end-of-war terms. One is revenge for Khamenei's death. That point could be met by the removal of Netanyahu—dead or alive—but finished, Khamenei. It's one possibility. Removing Netanyahu would change the Iranian perception; it would change the world's perception. Who could remove him? Only the Israeli military. Only the Israeli military—it would be a military putsch.

There's been a precedent between Pakistan and India, when Pakistan was reaching for its nuclear weapons last April. During Operation Sindor—which Pakistan lost to India when the war began between them—Pakistan reached for its nukes. When India detected that, they launched a massive

air and missile attack, destroying Pakistan's command and control and leaving Pakistan as defenseless as Israel is now. At that point, the Pakistani military, who run the country, telephoned Vice President J.D. Vance and said, "We want a ceasefire." That's how the war ended. The Indian officers who've described what happened talked about the relative rationality they shared with the Pakistani military to avoid the nuclear escalation step. It's happened before, it could happen again, and it meets the Ayatollah's first point.

The second point in the Ayatollah's end-of-war terms is that Iran must receive reparations from the enemy. If those reparations are refused, the Iranian side will destroy Arab property as well as U.S. bases to an equal value. Also, there are Iranian bank reserves stolen by the British—they're scattered around, but they could be restored. So there is a way of meeting the reparations term. And finally—and this is a crucial difference between Israel and the United States—the Ayatollah said the U.S. bases must be closed immediately. Now, the Iranian side, as we know, and your colleagues have done a terrific job of showing us how much destruction there's been, beginning with the loss of the big AN radars in Qatar, Saudi Arabia (if I'm not mistaken), and Jordan, on which all of Israel's and the U.S. air defense depends.

The U.S. could withdraw from the bases and not rebuild them, at least for the foreseeable future. They don't, in fact, need them. Why don't they need them? Because the U.S. can walk away with the idea that it has brought Pakistan and India into a U.S. strategic embrace. And we can come back to where India stands in this war—but it's certainly not with Iran; it's against Iran. If the U.S. calculates that its principal enemy is China, and it cannot cope with the unpredictability of tactical nuclear warfare against Iran—which would trigger a dead-hand retaliation—then Israel would be destroyed by that automatic response.

If the U.S. side decides, at the military level and the CIA level, that it can cope with the loss of bases, then it will gain a strategic combination—against Iran in the west, Afghanistan in the west, and against China in the east. So I can see, and I think we should be anticipating now, that the U.S. can walk away not with Trump's "win-win, total obliteration of Iran," but—well, not win-win and not obliteration—without the obliteration of Israel. So that's a theory. It's potentially wrong. However, I'm working from the basis that the U.S. needs and wants a short war and has to come to negotiation with the Iranian side on the Ayatollah's terms, not on the coffin cushions.

## **#Nima**

John, you mentioned the Strait of Formosa. I think one of the main questions, one of the main difficulties the Trump administration is facing right now is the Strait of Formosa. How did you find the reactions of the NATO countries? Donald Trump said that NATO without the United States is nothing, and then he comes out somehow begging them to help him in the Strait of Formosa.

## **#John**

Yes.

## **#Nima**

Who are these NATO countries, and how did you find their reaction to Donald Trump's request?

## **#John**

Well, I think the important point—and you implied it, and our audience understands it—is that the Europeans have broken into pieces. They see things differently. We know from the reporting, though it's a bit unclear, that the French and the Italians have tried to negotiate directly with Iran for an exit from Hormuz. Again, this is such a war winner. Iran is now the gatekeeper of the Persian Gulf. Not since Darius, 2,500 years ago, has Iran been so powerful despite its weakness. This is insufferable to the Jewish-Zionist-Israeli war plan, but there it is. So Europe acknowledges Iran as the gatekeeper and tries to negotiate an exit.

We've seen India, which declared war on Iran in the Knesset when Prime Minister Modi shouted, "I'm Israel, hi," forty-eight hours before he knew the war would start. There's a lot we can say that indicates there are military objections in India to Modi's behavior. In the meantime, we can see that Foreign Minister Jaishankar has been busy traveling to Europe, pleading for an Indian role to mediate a settlement between the Europeans and the Iranians—as if Iran needs India as an intermediary. So we know that the French and the Italians took the view: we'll negotiate with the gatekeeper. We no longer believe the castle can be destroyed; we'll go up to the gate and negotiate with the gatekeeper.

That's one thing. Merz, the German—the mini chancellor—and Starmer, the mini government leader of the UK, have taken a different line. They're mainly focused on continuing the war in Ukraine against Russia. They see Russia as their principal enemy. They don't want a war that drags on and gives Russia more and more economic leverage through energy supply. So it's unclear to me what Merz's actual policy toward Iran is. I don't see that he's at all confident about anything regarding Iran. We've seen the Belgian prime minister announce that Europe must normalize its relations with Russia because of the current war.

So we have a breakup of the NATO countries here, reflecting quite well their sensitivity—their political sensitivity and their political weakness if energy prices shoot up. And basically, Trump's as sensitive as they are; they're no more sensitive than the U.S. president is. So I think what we can see happening now is a total failure on the part of the Europeans to offer any form of joining the war. They don't want to join the war. The most Starmer can do, plus the French, a few Spanish weapons, the Greek Navy, and the Cyprus Navy, is throw a few things into the defense of the British sovereign base at Akrotiri in Cyprus, after two hits on the Akrotiri base there.

This is for show. They all combined and failed, as you know very well, to open the Red Sea against the Houthis. The Houthis took terrible punishment during that episode, but they won, establishing themselves as the gatekeepers of Bab el-Mandeb, right? They did. But compared to them, the Iranian achievement is even greater. And I think the answer to your question is that NATO and the United States are in the same boat—and that boat is either locked into the Persian Gulf, where it's a sitting duck, or locked out, where it can't open the energy spigot. And that energy spigot must open to a certain extent for the market to normalize after two weeks.