

John Helmer: Iran's 5 Conditions for US Deal EXPOSED

Escalating US-Iran conflict analyzed: military strategy, Iran's decentralized defenses & decoy tactics vs. precision strikes. Strait of Hormuz closure risks disrupting 20% of global oil, triggering worldwide economic crisis. Explores potential Russian/Chinese support for Iran—mirroring Western aid to Ukraine—and escalation risks toward broader global confrontation. Historical parallels drawn to WWI /WWII aftermaths and potential restructuring of international institutions. Economic fallout discussed: stagflation, energy shortages, deindustrialization in Europe, and US fiscal strain from soaring military spending amid rising debt. Questions raised about NATO's relevance, European refugee concerns, and sustainability of unilateral US foreign policy. Dialogue examines whether domestic economic pressures could reshape political dynamics, and how the global South may respond to weaponized finance and trade. A sobering look at war, economics, and the future of international order.

#Nima

Donald Trump, yesterday, the way he was talking about war—he said that we are negotiating with the Iranians, which was rejected. Iranian officials said nothing of that sort is happening. And here's what Donald Trump was asked by reporters.

#John

Iran's foreign ministry says you're not telling the truth about having productive conversations to end the war.

#Speaker 03

Well, they're going to have to get themselves better public relations people. We've had very, very strong talks. We'll see where they lead. We have major points of agreement—almost all points of agreement, I'd say. Perhaps that hasn't been conveyed. The communication, as you know, has been blown to pieces; they're unable to talk to each other. But we've had very strong talks. Mr. Witkoff and Mr. Kushner had them—they went, I would say, perfectly. If they carry through with that, it'll end that problem, that conflict, and I think it'll end it very, very substantially. We have very much in mind our partners in the Middle East. We've had great relationships with a lot of them, as you know. A lot of them were surprisingly hit, and I was surprised to see it—and so was everyone else. But we have that very much in mind in the discussions. The discussions took place yesterday and went into the evening. They want very much to make a deal. We'd like to make a deal too.

#Nima

John, what do you make of what Donald Trump is doing?

#John

Well, the most important thing is that he's trying to rescue escalation control. You heard him say he was surprised that Iran hit the Arab states, the Gulf states. It's impossible for a president of the United States—given the kinds of intelligence briefings he gets, even if only weekly—to have been surprised. What we know, and what our colleagues on your program, and you yourself, have pointed out, is that there was no shortage of warnings for weeks and months. The real surprise was their failure—their inability to destroy Iran's capability to retaliate. Principally, their war aims—regime change, decapitation, replacement of leadership, chaos in the streets, failure of anti-aircraft defense, failure to retaliate with missiles—all of that has failed.

And as Ted Postol said a few hours ago, Israel's air defense is now simply non-functional. You can see that in the videos of the sky. So, what Trump is doing is trying to say, "I'm in control," and to reassert escalation control when they've already lost it. They've lost in several key areas, and we'll get to those. First, they've lost the Hormuz Strait regime. They've lost the ability to prevent Iran's retaliation—both against Israel and against the U.S. bases. The interesting part is, what is he talking about when he says that Witkoff and Kushner were having talks? The hint there, notwithstanding Iranian denials that there are direct negotiations—or negotiations "with quotes," as he put it, with the top man—that was an expression Trump used in that particular set of remarks.

I would say, on balance, they're indirect. They're indirect either through Pakistan—which now plays a very significant role, putting India completely in the shadows—or through Turkey, possibly Oman, possibly Egypt. Those are the four contenders. They've all had their hands up, as lots of people do, to make reputational gains, to make money gains. And as we were saying just before we came on, a few minutes ago, the Financial Times in London did the research showing that the speech and the tweet that triggered the so-called elimination of the 48-hour deadline led to nearly \$600 million worth of insider trading on the New York stock markets—both in oil futures and in the stock market index futures.

So Trump is talking to the markets—talking at the money—and the money's making money on what he says, as speculation about what happens next or what doesn't happen next. So escalation control here is a military aim, a political aim, and a money aim, and the money gets delivered to his supporters. His supporters put some of that money back into his election campaigns, and so the cycle goes. That's how I would read the first set of remarks. We can come to it in a minute, but the question is: who talks back at him? Iran, on the one hand; Russia, on the other hand; China, on the other hand. In what ways are they addressing what Trump said? And we can come to that in a minute.

#Nima

I think, John, you've mentioned Turkey, Egypt, and other countries that are trying to get involved. How do you see the way Russia views the conflict so far? What's the understanding from Russia's side—or maybe from China?

#John

Well, let's take them separately, because they're different—importantly different. Let's take Russia first, because it's complicated, but also easier. I know a bit more about Russia. What's emerging is a kind of two-track Russian policy. If I put it this way, the way to measure China and Russia is to start with what they know—what we all know—are Iran's terms for ending the war that was forced on it, yes? So if we go to Iran's terms, as spelled out very clearly by Muslim al-Khamenei and repeated in statements from the IRGC—let me just run through the main points. You know them very well, but just to remind our readers.

And let's then apply your question to what Russia is doing about, and saying about, those terms. So, what are Iran's terms for ending the war? First of all, no ceasefire. That's not the issue. It's what we've called, in the Ukraine–Russia negotiations, “root causes.” You've got to address the long-term danger to Iran of a genocidal, expansionist state—Israel—and the Jewish community worldwide that supports it, especially in the United States. Iran can't simply have an immediate ceasefire and then wait for the next round. That's not on. And right now, given the change in the balance of military force and the change in political power that Iran has enforced in the Middle East, let's say the first term is: no ceasefire; must address root causes.

Second, Mashdaba Khamenei's speech referred to reparations that must be paid for the damage inflicted on Iran. And if reparations aren't paid, then Iran will inflict damage equal to the damage done to it. That's basically a task for the Arab sheikhdoms to pay. They're capable of paying, and they're capable of suffering the destruction. But reparations or destruction—tit for tat—is the second major strategic aim of Iran in this case. It's implementing it tactically and operationally in a very careful way. You can see that for each attack by Israelis or Americans on targets in Iran, it then selects a comparable target in Israel or in the Arab states—U.S. bases or facilities, banks, and so on in the Arab states.

So, tit for tat—reparations or destruction—is number two. Number three, Khamenei said “revenge.” Now, that's very important. It's not often discussed. But obviously, revenge for the death of Ayatollah Khamenei—what's comparable to that? Well, possibly the removal of Netanyahu. And we talked last week about how Netanyahu had an enforced disappearance, lost control of the prime ministry, and still doesn't appear to be in control the way he was before. Now, in the Israeli parliament—he's not dead, that's clear. He's not even wounded, that's also clear. However, he may have lost power. Would removing Netanyahu through Israeli elections constitute an adequate term that Iran might accept?

There are Knesset elections in Israel that must occur by October of this year. We see elections in Ukraine as one of the terms in the Russian negotiations. So, is an electoral removal of Netanyahu one of the possibilities that would amount to something less than capital punishment for the third term? It has evolved from Mojtaba Khamenei's speech to now, and that's a new regime for operating the Strait of Hormuz. It can't be used against Iran, and Iran has the capability to use that strait—and possibly Bab el-Mandeb, which is controlled from Yemen—to bring the rest of the world that consumes energy products to an understanding that the root-cause solution for the Middle East cannot involve unbalanced support for Israel.

So, a new regime for Hormuz is the fourth term. And the fifth term—Moshe Bachman was very clear about this—it's the end of U.S. bases on Arab territory because they threaten Iran and unbalance the region. All right, so now, if we say there are five terms—no ceasefire, reparations, revenge, a new regime for Hormuz, and an end to U.S. bases—we go back to your question: what's Russia saying about these things? Then we'll come to China. Answer: next to nothing. Yesterday, there was a telephone call between Minister Arachi and Foreign Minister Lavrov, and in the communiqué—I'm looking down at the text so I get it right for you—

Lavrov—this is the Russian summary that was published around two o'clock yesterday afternoon—pointed to the, quote, "categorical unacceptability of U.S.-Israeli strikes on Iran's nuclear infrastructure, including Bushehr, which create unacceptable safety risks for Russian personnel—not just Russian personnel—and are fraught with catastrophic environmental consequences for all countries of the region." Well, yes, that's a warning to Israel and the United States: don't hit Bushehr, which was partially struck nearby the other day.

Then Lavrov says he noted—and this is the important part—the need for an immediate cessation of hostilities and a political settlement taking into account the legitimate interests of all parties involved, primarily Iran. Well, what does that mean? Does it mean Russia wants an immediate ceasefire? I'll come to that in a minute, but China seems to think so. Well, if Russia is saying something vague, it ought to sharpen up its terms. Iran's very clear on its terms—we just spelled them out. They couldn't be clearer. If Russia is responding at the ministerial level after a conversation with Arachi, why are we talking about an immediate cessation?

Immediate cessation without addressing the root causes is impossible for Iran. So what, then, is the phrase Lavrov has used—and he's used it before, and it's used by other Russian officials—"legitimate interests of all parties involved"? Does that mean Israel? Does that mean the United States? And what's a legitimate interest? Then the question becomes, we go back to the Iranian terms. They're not connected; they're vague assurances that aren't properly linked. Then the last point that Lavrov and Arachi made was that Arachi thanked the Russian leadership for significant diplomatic and other support provided to the Islamic Republic, including the supply of humanitarian assistance. Well, here's the two-track.

And Israel's already warned about it and attacked. The second—the first track is the president, the Kremlin's relatively noncommittal approach, leading the foreign minister to say things like this, which don't address the specifics of the Iranian terms. When Russia's negotiating with the United States, with Ukraine, and with the Europeans over the Ukraine war, the terms are specific. Why are we fuzzy now? The second track—that's a presidential idea, that's Putin's idea. Let's have ambiguity, because it's in Russia's interest, since it's at war with the United States and Ukraine, and a major offensive is coming up.

Let's note that—not to antagonize Trump so severely that the negotiation for peace in Ukraine would be damaged. That's a Russian interest. So let's call the first track fuzzy diplomatic language, unclearly addressing Iran's terms. The second track is military, intelligence, and secret. It involves resupply down the Caspian. That's why Israel attacked Bandar Anzali, the Iranian port on the north shore of Iran, on the Caspian Sea. That port has been used by Iran to ship drones and other military equipment to Russia for the war against the United States and Ukraine.

The possibility is more than likely that the flow has been reversed and Russian military supplies are going south along that route through the port. Israel attacked the port. Zelensky has publicly said that the route has been reversed. But let's just say it remains entirely secret—and should remain secret—that Russia is not only aiding Iran for humanitarian reasons, which is clear. There have also been airplane shipments through the Ministry of Emergencies, intelligence sharing, and the sharing of live data related to detecting incoming Israeli and American attacks, and assisting Iran in retaliation.

That's the second track. It's not discussed, but we can discuss it here. It's best not to exaggerate it—but we don't have to exaggerate it either. The Israelis just put a very clear cross over their "T" on that matter. They think Bandar Anzali is a significant element of Iran's capability to fight back, and that depends partly on Russia. Of course, there are land corridors—through Turkmenistan, through Tajikistan—against which the U.S. is working actively to block those governments from cooperating. That's a secret element. I'm not able to talk about it. So where are we then? The answer to your question is: what's Russia doing on Iran's terms?

It's assisting secretly on that second track—helping to reinforce Iran's ability to negotiate. That's crucial. It's adding to the strategic balance that makes negotiations viable and serves as a deterrent for the long run. But on the first track—presidential statements, whether from Putin himself, Dmitry Peskov his spokesman, or, better put, from Lavrov—they're ambiguous. They don't say, they do not say, why any negotiation with Iran must address the root causes. Easy to say, but... It's said about the Russia-Ukraine negotiations, but not here. So we have ambiguous talk that can mean everything or nothing. Now, shall I go on to how China responds to this, or would you prefer to ask?

#Nima

Yeah, go ahead—talk about China. It's good to connect both Russia and China, to know what's going on.

#John

So, just to repeat, we've got Iran's five-point terms. Would we agree? Does our audience agree? Do you agree? They're clear—they couldn't be clearer, right? So... Then I went through the Chinese Foreign Ministry's daily press briefing by Lin Jian. I'll just tell you quickly: he was asked about Trump's 48-hour deadline for reopening the "Homeless Street," and asked, what's China's comment on that? And then Lin Jian—I'll read it to you, because the language is important to understand for what it means and what it doesn't mean—said: "The conflict in the Middle East," I'm quoting, "is still spreading and spilling over. If the conflict continues to expand and the situation once again escalates, the whole region will be plunged into chaos."

Force will only lead to vicious circles. China strongly calls on all parties to the conflict to immediately stop military operations, return to dialogue and negotiation, and not continue a war that should never have happened. Now, that was said yesterday. I can tell you that Lin Jian repeats himself day in, day out. Let me just go through some of that language. The Chinese position, as stated by the Foreign Ministry, often refers to the region being plunged into chaos. Force will only lead to a vicious circle. Now, this is China speaking. Chaos is not the outcome of the use of force. Do the Chinese remember Mao's famous expression, "Power comes out of the barrel of a gun"? Meaning, force changes the balance of power. The balance of power is decisive.

Changes in the balance of power—revolutions, wars—do not produce chaos. They produce winners and losers. I invite any Chinese expert, if there is one in the audience, to explain to me why the Chinese official statements keep referring to "chaos," which is a very non-Maoist term. Second, you'll notice they're addressing the Iranian terms by calling on the parties to the conflict to immediately stop military operations. That sounds like an immediate ceasefire. It sounds like the antithesis of Iran's terms. Now, we know that China also has a two-track approach. It is assisting Iran in all sorts of ways—in secret, militarily, infrastructurally, and financially. Yes, exactly how? We don't exactly know. But why is the diplomatic statement, as it were, so contrary to the Iranian terms?

I can't tell you why, but that's the most important element I can see in the Chinese response. So let's leave out India, the third founding member of BRICS, because India has totally compromised itself by aligning with Israel and the United States. We've talked about that before. India is incapable of acting as a mediator any longer. It is not neutral. And worse, India has, behind the scenes, blocked a collective BRICS resolution condemning the attack on Iran. Remember, India's a member of BRICS, Iran's a member of BRICS, but India, behind the scenes, is blocking collective condemnation from BRICS of the attack. So India is not neutral; it's on the Israel-U.S. attacker side. So Russia and China are the principals supporting Iran, and we have this two-track approach, as I've just explained.

