

Larry Johnson: GENEVA DEAL: Breakthrough or Illusion?

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The new statement from Hezbollah in Lebanon—because last night when we were talking, many people were arguing about what was the main reason that Iran decided not to retaliate against the Israeli attack on Lebanon. And as Professor Malandi said last night, there is some sort of concession in this new text between Iran and the United States that may benefit Lebanon in the long run. And the statement today by Hezbollah—I think, before going to the statement, we had Lebanese people going to the southern part of Lebanon. They're so happy right now because they're getting back to their homes.

Israelis are still there, but it seems that they cannot do much about it because a huge crowd is going to the southern part, in those cities—Nabatieh, Tyre—those cities in the southern part of Lebanon which were bombed by the Israelis. But the new statement of Hezbollah, I think what is so important, it says it welcomes the Iran-U.S. agreement and ceasefire. It says Hezbollah congratulates Iran for reaching a memorandum of understanding with the United States. It describes the agreement as a major achievement that has resulted in a comprehensive ceasefire across multiple fronts, including Lebanon. Then it talks about the leadership in Iran, the people in Iran, how they sacrificed everything for the acts of resistance, how they helped Lebanon.

And to the Iranian Supreme Leader, former Iranian Supreme Leader, and the new Supreme Leader, to the Iranian President. And they said they support Hezbollah. It expresses gratitude for Iran's political and strategic support to Lebanon and the resistance movement. It highlights Iran's insistence that Lebanon's interests be included in any ceasefire agreement, and that Iran is going to consider all the concerns on the part of Hezbollah and the Lebanese people. And the other point in this is the call for Lebanese unity, which is so important. Hezbollah argues that Lebanon should use the current international and regional support to strengthen its sovereignty. It urges the Lebanese government and political factions to adopt a unified national position.

I think what's going on with this term, what's important, is the way that Syria, with the new leadership in Syria, the head of HTS, is talking about their negotiations, their experience with Israel. We had the Syrian so-called president saying to the Lebanese prime minister that there is no point in

negotiating with the Israelis. We did that, but nothing positive came out of those negotiations. On the other hand, we had the United States talking about maybe Syria can join Israel in that fight in the southern part of Lebanon, to which the Syrian advisor to the president of Syria said, no, we're not going to be part of this. I think that's the point with the case of the Lebanese and the different political factions in Lebanon, that they're getting to the point of understanding.

I think the argument would be they have to understand there is no way to negotiate with the occupier in Lebanon. This is the point that Hezbollah is mentioning in this case. And the other points and the goal for the future, he says, are the complete liberation of Lebanese territory, the return of Lebanese prisoners in Israel, the return of displaced residents to their homes in the southern part of Lebanon, and the reconstruction of areas damaged during the conflict. These are the goals of Hezbollah that were mentioned in this. And this is the whole point, and they're talking about the acts of resistance, how they have to bring everybody together to deal.

They know that the conflict is not over, and they don't want to be too optimistic about what's going on, but this is the new reality. There is some sort of MOU happening between the two sides. Maybe Hezbollah would benefit and Lebanon would benefit, maybe Iran and the United States would benefit from that. This is the understanding on the part of Hezbollah, Larry. And I think there is good coordination between Iran and Lebanon in terms of understanding what's at stake right now, what the future will be, and what the challenges are considering the Israeli occupation of Lebanon. Go ahead with your understanding of the position of Hezbollah.

#Larry

Well, look, think of it this way. When the Lebanese civil war started 51 years ago, the people who were the young activists in that war, they're 75, 80 years old now. So they're really old people if they survived. And that means that people who are 55 years of age and younger, they have no memory. All they've known is civil war. That's all they've known. The invasion of southern Lebanon in 1982, which initially the Shia welcomed the Israelis, I'm told. And then the Israelis, being the Israelis, certainly quickly wore out their welcome. But the situation that has changed is during the 1970s, or let's say the 1980s, Lebanon was very much a pawn.

#Larry

It was a ping-pong ball. It was caught between the Israeli efforts to control it. The father of Bashar al-Assad and his support for Amal played an important role in meddling in the politics of Lebanon. And, you know, I think back then the tensions between the Sunnis and the Shia were higher because of, you know, the previous massacre that Hafez al-Assad had carried out. And Israel wasn't quite as, I don't know if you want to say it was as strong back then, but Iran was just, you know, Iran was new. It was just barely getting on its feet, trying to figure out what to do. It was not, you know, flush with resources.

So where we are right now is, for the first, you know, really the first time since Iran's establishment in '79, it has committed to fighting on behalf of and in coordination with Hezbollah. And the Lebanese government is too weak to take on Hezbollah. The Lebanese army, at least 40% of the soldiers are Shia Muslims, with relatives that are tied into Hezbollah. So there's not a military solution in Lebanon. It's not a matter of saying, okay, we're going to restart the civil war and expand that. Okay. So, you know, Israel is once again caught by, you know, thinking that it can militarily change Lebanon, create, you know, eliminate Hezbollah — not going to happen. Get control of the government of Lebanon — not going to happen.

And I did see a report before coming on with you that the Galilee Brigade is withdrawing. They're taking a break, they're going on R&R, but they're essentially withdrawing from Lebanon. So we're starting to see that maybe this MOU that is supposed to be signed on Friday may actually have some teeth to it, because the Iranians affirm that it says immediate and permanent ceasefire, which effectively means Israel's got to pull out of southern Lebanon. And I think that's fully the expectation on the part of Iran and Hezbollah. So if that doesn't happen, then that unravels this agreement right off the start. That's why it doesn't even get a—it's stillborn. It's dead in the crib, so to speak. So, well, you know, that's one thing we're monitoring this week, monitoring today.

Is there any sign that the Israelis are moving out, or are they continuing to attack? And by tomorrow, they most definitely should be moving and disengaging, Israel. But I suspect that they won't do that because there's not political support in Israel for that move, unless Donald Trump really pulls the plug on support for Israel, which he has the power to do, but I don't know if he has the political will to do it. I doubt he has the political will to do it. So that's why I call this agreement, this MOU, I call it the IOU MOU. We'll see. It's because it's not guaranteed that it's going to be signed, and we don't even have clarity yet to look at what the document the United States has and what the document Iran has. Let's see them both. Put them out there. Let's compare them side by side, because we're hearing different things from the United States' side.

As you mentioned, J.D. Vance is saying something completely different from what the Iranian version says. And whether it's, you know, that Iran—you know, the U.S. says Iran can't charge tolls, Iran says, hell yes, we're charging tolls. They just don't use the word "toll" immediately. This withdrawal out of Lebanon—immediate, permanent—from the Iranian standpoint, that's what their document says. No sign the United States is enforcing that. \$12 billion up front, and the United States says, oh, hell no, no, no, they don't get that up front. Immediate sanction relief—no, no, no, no, there's not immediate. So I said the two sides are just sort of engaged in self-delusion, I think. They're telling themselves what they want to hear instead of stepping back and saying, okay, what does it actually say, and what's the other side actually doing?

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We've learned from both sides—J.D. Vance today and Iran's foreign ministry spokesman, Ismail Baghaei. He said the same thing, that they're going to release the document on Friday. As they sign

it, they're going to release the document for everybody to see and read. The points—14 points in that MOU. And here is what the Iranian side said today: according to the MOU, Iran will be responsible for managing passage through the Strait of Hormuz in coordination with Oman. Iran is not seeking to impose tolls.

However, in return for navigation services, environmental protection, insurance, and other maritime services, Iran will collect the necessary fees. It seems, Larry, not only is it going to be in the hands of Iran and Oman, but they're still willing or open to talk with other Arab nations, GCC countries in the region, in order to calm down the situation, to reduce the friction that exists among these countries. And this is the agenda on their part. If I'm not mistaken, in the first 60 days of the agreement, there would be no fee or there would be no toll in the Strait of Hormuz, if I'm not mistaken.

#Larry

It wasn't mentioned by... Again, that's confusing because for 60 days they're not going to charge, but they say they are going to charge. So again, if Iran—I think, frankly, if Iran has agreed to not charge for the first 60 days, they're insane. Haven't they learned a goddamn thing in the course of the last two years? You do not trust the United States. I mean, it's ridiculous. Make them pay. That is their leverage. That is Iran's leverage.

#Nima

I don't know. This is the rumor. I haven't heard it from the United States. I haven't heard it from the Iranian officials. None of them talk about it. The only thing that the Iranian side said today was that they're going to charge the fee, and it's going to be decided between Iran and Oman. There's not going to be any other player. Let's see what the outcome of that is. Larry, we had J.D. Vance talking with MSNBC. He had an interview on MSNBC. The way he's talking about the deal, he's so optimistic.

I don't know where that comes from. He says, we have the connection. We are talking to the reformists, to the hardliners, to the right, to the middle. We have connections with all parts of the government in Iran, and the negotiations, the talks, are happening. And he says that he's not talking about back channels, he's talking about direct talks, direct negotiations between the two sides. I haven't seen any sort of evidence to support that. I think I agree, I agree. No, I agree.

#Larry

Um, you know, let me put it this way. If it's true, then that's a welcome development. But, you know, Iran's got to have some clear benchmarks of what is going to happen on Friday. You know, the minute they sign on Friday, does Israel magically withdraw from Lebanon? No, they've got to be

on the way out before then. You know, Iran, frankly, looking at this deal overall, I think, you know, the more I look at it, the more—and I'm basing this upon what Esmail Baghaei said—it's a terrible deal. It doesn't serve Iran's interests. I mean, frankly, it's naive, right?

#Nima

What did he say?

#Larry

Well, he said the release of Iran's frozen assets and compensation for war damages are two key priorities. Of course they are. And the United States is committed to implementing them. Excuse me, but fuck that. What's the date? When? Specific. That by Friday, the United States is going to lift sanctions. But they don't do that. So, you know, it goes on to say Iran considers access to assets a legal right and continues to firmly demand compensation for this unlawful war. Demand all you want. Put it in the specifics that Iran is submitting a bill for, say, \$300 billion, and the United States agrees that that will be funded and paid. You don't get that. You know, under this memorandum, the United States is obliged. How are they obliged?

They're not obliged. They don't have a gun to their head yet. This is to lift all primary and secondary sanctions. You know, it's like, for God's sake. I mean, is the Iranian delegation really this damn naive? Oh, the United States promised. They're obliged. They're not obliged by anything. They have no obligation. There's not a legal obligation. You don't have their troops trapped where they're saying, okay, yeah, we'll let our troops go and we'll give you these things. So that's what I said. The more these details come out, I think that that one conservative member of the Iranian parliament, I think he's exactly right. You know, I think, you know, frankly, Araqchi probably ought to be removed from office over this.

#Nima

Yeah. Yet we don't know exactly what's going on in that document. Because if you look at what J.D. Vance just moments ago said on CNBC, he said that we don't have to give Iranians anything if they don't make the commitments that we want long-term on the nuclear program. I don't know what's the issue with the nuclear program. The nuclear program, they have just the issue that that's part of the MOU, if I'm not mistaken. Iran has declared that they're not pursuing nuclear weapons, and they're not going to produce it or buy it from somewhere else, and that's the whole point on the part of the Iranians. So if that's not the issue, what else do they want from the Iranian side?

#Larry

Yeah, yeah, surrender. That's what they want. They want surrender. You know, the Iranian foreign ministry is really, you know, they've been, I guess they're trying to accommodate the Pakistanis who

have been pushing for this broad agreement. And, you know, just the language where he keeps saying the United States is obligated to do this or it's obligated to do that or it's committed to do this. Okay, how? How are they obligated? All you've got is their promise that they're going to do this, but they don't give a specific date and time for doing it.

And it's like, didn't Iran learn anything under the JCPOA? They had all these promises and assurances there, and then when it was convenient for Trump, he just tore it up because it had no legal standing. This MOU has no legal standing. It's just a promise between two people to say, you know, it's two different groups giving assurances to the other side, oh yeah, we're serious about this. Well, one side is lying. Let me put it this way: one side is lying, and that's the United States.

#Nima

It seems that upon signing the document on Friday, they're going to release half of Iran's frozen assets.

#Larry

No, they're not. No, they're not. That's what the Iranians think is going to happen, but the United States has made it clear: we're not releasing a goddamn thing.

#Nima

I think there is a lot to be learned about this document. There are a lot of questions.

#Larry

Yeah, I mean, that's why I say the United States needs to release its document, Iran needs to release its document. Let's put them side by side and see—do they say the same thing? I bet you they don't.

#Nima

I suppose that they have the same document. They don't need to release it separately. No, my understanding is that if they sign it, it's going to be a unique document. It's not going to be two different versions.

#Larry

But you're not understanding me. What I'm telling you is, right now they're claiming they have an agreement. But they don't have the same documents. So each side thinks, oh, I've got an

agreement on this. Like Iran, oh, we're going to get \$12 billion up front. And the United States is saying, hell no, they're not getting \$12 billion. They can go pound sand. That's not going to happen. So that's still being worked out. That's why I say I think this thing will be derailed by Friday.

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Could be, could be. Israel is just doing everything. Smotrich, just moments ago, said that they have never experienced such international pressure on Israel, basically on Benjamin Netanyahu. This is a new level of pressure on Israelis. And J.D. Vance, in the interview, said that Israel has to come to the table. It means that I don't know how serious that is. Let's see what happens. I think J.D. Vance's record is not positive. What J.D.

#Larry

Vance said so far. Yeah, I was just—but look, Donald Trump does hold the power over Israel if he is willing to use it. And the question, the big issue is, is he willing to use it? Israel depends right now on U.S. air refuelers in order to carry out strikes on Iran. So if Israel wants to reengage and attack Iran, they need U.S. air refuelers. Now, without that, they can't. So here's, you know, Trump has it in his power to say, okay, we're calling all those back, ordering all U.S. assets to return immediately to the United States. That would send one message to Israel.