

Has Trump surrendered?

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We woke up to talk of a ceasefire this morning. According [to The Guardian](#):

The US and Iran agreed to a two-week conditional ceasefire on Tuesday evening, which included a temporary reopening of the strait of Hormuz, after a last-minute diplomatic intervention led by Pakistan, canceling an ultimatum from Donald Trump for Iran to surrender or face widespread destruction.

[They also noted:](#)

According to state media, Iran will only accept the war's conclusion once details are finalised in line with a 10-point peace plan reportedly submitted to the White House via Pakistani intermediaries.

The main elements of the 10-point plan, based on my reading of the Guardian, New York Times, FT, Wall Street Journal, and Indian media is as follows:

1. Full ceasefire and end to hostilities

- * Immediate halt to all military action across the region
- * Includes linked conflicts (e.g. Lebanon front)

2. US guarantee of non-aggression

- * A binding commitment that the US (and allies) will not attack Iran again

3. Lifting of all US sanctions

- * Removal of both primary and secondary sanctions
- * Restoration of Iran's access to global trade and finance

4. Release of frozen Iranian assets

- * Return of funds held abroad, especially in Western jurisdictions

5. Acceptance of Iran's nuclear programme

- * **Recognition of its right to enrich uranium**
- * **An end to international restrictions on enrichment**

6. End of UN and IAEA restrictions

- * **Termination of monitoring or sanctions regimes targeting Iran's nuclear activity**

7. US military withdrawal from the region

- * Removal of US combat forces from the Middle East

8. Control over the Strait of Hormuz

- * Iran retains strategic control or oversight of this key shipping route
- * In some versions, Iran and Oman could charge transit fees, which may be linked to the next point

9. Compensation / reparations

- * US to pay for war damage and reconstruction costs

10. Formal international agreement

- * A binding UN-backed resolution guaranteeing the terms
- * Long-term security framework for the region

I should note that there is considerable uncertainty around points five and six. The English-language versions of the plan do not include these points, but apparently the Farsi versions do. Given that uncertainty, the above list is most definitely an approximation, but it appears to be a fair representation of what is in the media this morning.

Interpretation

In that case there is one overwhelming point in note, which is that this appears to record a resounding victory for Iran in this war. Interpretation of the plans suggests a number of key points.

Firstly, point 2 makes clear that the US has not only backed down, but has effectively withdrawn from the Gulf, which is reiterated in point 7. It would appear that the US has agreed to withdraw all its bases in the Gulf states, which is an enormous change in direction for US policy and leaves Iran as the dominant Gulf power.

Secondly, points three and four make clear that the previous economic sanctions against Iran have been withdrawn, freeing its oil trade and ensuring that it can control its own economic future. This is a massive victory for the Iranian authorities and will provide it with the economic power to deliver stability in Iran in the future. In that case, the likelihood of the people of Iran overthrowing the government, which appeared to be Trump's reason for this war, will probably disappear. Populations facing enhanced economic prospects do not overthrow their governments.

Thirdly, this is reiterated in points eight and nine. There is some ambiguity in this area, but if Iran continues to control the Strait of Hormuz and is granted the right to charge for passage, then the immediate demand Donald Trump made for its reopening on an unconditional basis has been forgotten by his administration. The fees charged will ensure that reparations can be made for the war. If the US has agreed to contribute to these reparations, that is an admission of guilt.

Fourthly, points one and 10 are linked. The ceasefire is, according to this list, meant to be universal and cover Lebanon. It already appears that Israel does not agree. The long-term security that .10 refers to would appear to require its cooperation. There remains considerable doubt as to whether it will be provided.

Finally, whether clauses five and six actually exist in the form noted is unknown at present. There must be a reference to nuclear issues in the list, but what precisely has been agreed is not at all clear, but given that it seems likely that Iran's nuclear capacity was destroyed in 2025, as the US claims, the issue has never been justification for this war.

Reaction

So, what is the appropriate reaction to this proposed ceasefire, because as I note, it is not apparent that it is in place as yet, given that Israel does not appear to have agreed to it, and attacks on Iran did take place after the supposed announcement of the agreement?

Firstly, there is immediate relief, but I will comment upon that in a separate post, soon. The relief is decidedly limited because of what has happened over the last few days.

Secondly, the overwhelming sense is of US surrender. This sentiment cannot be put in any other way. This 10-point plan appears to give the US nothing as a consequence of this war. It does most definitely enhance the power and regional influence of Iran, whilst appearing to severely constrain Israel in ways previously unimaginable.

Thirdly, the regional consequences of this are hard to imagine. If this interpretation of the plan is correct, the US is withdrawing from the Gulf states, all of which will now live in the shadow of Iran, even if they continue to be armed by the USA. This may, of course, create regional stability, but that ignores the tensions between these states, which suggest that this outcome is unlikely.

Fourthly, we might be very unwise to think that any plan of this sort is going to be enacted. That hope might be incredibly naive. Instead, what we might have is the excuse that Trump wanted to back down from the ultimatum that he had presented, and he has no real intention of delivering on this plan at all. Forgive my cynicism, but I think that this is the most likely development that we will witness over the next few days. Israeli refusal to cooperate with the plan will be used as an excuse for him to renege on it.

Fifthly, even if that is the case, the appearance within this plan that Trump has lost on just about all fronts in this war will not go away. Trump's belief that he could start a war without a strategic goal and impose regime change by the use of air power alone, without stating that to be his aim, has been proven to be totally misplaced. Everything that has happened since has revealed his weakness, and not his strength. My point is that, as [**I said in a video and post yesterday**](#), **everything will change as a result of this war, and whilst I am not very confident that this ceasefire will last, I am sure this observation is correct.**

In summary

Trump threatened heiniously yesterday, before backing down last night in a humiliating indication of perhaps the biggest US military defeat in its history if this peace deal does last and is confirmed. Whilst the immediate reaction is relief, the position remains profoundly uncertain, and Israel's reaction is utterly unpredictable, suggesting this relief might be short-lived. The likelihood is that this war and its consequences are a long way from being over.