

# WEEKLY ANALYSIS

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## UNITED STATES–IRAN NEGOTIATIONS: OUTCOMES AND FUTURE SCENARIOS

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Weekly Analysis is one of the CSRS publications analyzing significant weekly political, social, economic, and security events in Afghanistan and the region. The prime motive behind this is to provide strategic insights and policy solutions to decision-making institutions and individuals in order to help them design better policies. Weekly Analysis is published in Pashto, Dari, English and Arabic languages.



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## UNITED STATES–IRAN NEGOTIATIONS: OUTCOMES AND FUTURE SCENARIOS

### Introduction

The first round of negotiations between the United States and Iran over the Iranian nuclear issue reached an impasse after several rounds of talks. These discussions were accompanied by a two-month deadline set by President Donald Trump on 5 March 2025. The proposal was formally rejected by Iran's Supreme Leader on 12 March 2025, effectively bringing the diplomatic process to a halt.

Concurrently with the expiration of the U.S. deadline, Israel initiated extensive airstrikes against targets inside Iran. Tehran responded with reciprocal missile attacks against Israel. After several days of escalating hostilities between Israel and Iran, the United States entered the conflict, conducting air operations against three Iranian nuclear facilities—Fordow, Natanz, and Isfahan, while announcing the destruction of these sites and subsequently declaring a ceasefire.

Several months after the twelve-day confrontation, President Trump once again raised the nuclear dispute, deploying the aircraft carrier *Abraham Lincoln* to the Arabian Sea and threatening renewed military action in an effort to compel Iran to return to the negotiating table. Ultimately, Tehran agreed last week to resume discussions, and the first round of renewed talks was held in Muscat, the capital of Oman.

Against this backdrop, several central questions arise: What factors compelled Iran to accept renewed negotiations? Can these talks lead to a sustainable agreement, or is a repetition of prior military escalation likely? Finally, in the event of either agreement or failure, what scenarios can be envisioned for the future trajectory of this process? Possible outcomes include a limited agreement, a comprehensive accord, the continuation of a suspended status quo, or a renewed cycle of military confrontation.

### WHY TEHRAN RETURNED TO THE NEGOTIATING TABLE

Iran's decision to return to negotiations reflects a fundamental shift in Tehran's strategic calculations. This change appears to be driven by several interrelated factors: the erosion of military deterrence, weakening domestic legitimacy, mounting economic pressures, growing strategic isolation, and the credible threat of direct U.S. military action.

**1. Erosion of Iran's Deterrence Capacity:** For years, the Islamic Republic's security doctrine rested on the assumption that its regional network of proxy groups, expanding missile capabilities, and ability to threaten U.S. and Israeli interests constituted an effective deterrent. On paper—and reinforced by sustained official rhetoric—these multidimensional capabilities



were presented as imposing prohibitive costs on any actor contemplating direct military action against Iran.

However, developments over recent months have seriously challenged this assumption. Repeated Israeli strikes against Iranian-affiliated forces in the region significantly weakened their operational capacity. The collapse of the Assad regime in Syria, long regarded as Iran's most important regional ally, resulted in the loss of Syrian territory as a forward line of defense and a strategic corridor.

The subsequent twelve-day confrontation on Iranian soil marked a decisive turning point. In that conflict, senior military commanders and prominent nuclear scientists were killed, and substantial damage was inflicted on Iran's nuclear infrastructure and military facilities. These events disrupted previous strategic equations and shifted the balance of power markedly against Tehran. Most importantly, they demonstrated that Iran's deterrence posture had failed to prevent large-scale direct attacks.

The situation escalated further when the United States directly entered the conflict and targeted Iranian nuclear facilities. This move reinforced the perception that President Donald Trump, like other U.S. presidents before him, was prepared to authorize direct strikes on Iranian territory if deemed necessary.

Equally significant was the realization that no major power, neither Russia nor China, was willing to stand alongside Iran in a meaningful way during the crisis. While Iran demonstrated its capacity to retaliate, including missile strikes against Israeli territory and U.S. military installations in the region, the broader outcome exposed the limits of its strategic leverage. Collectively, these developments undermined the foundations of Iran's prior security calculations and revealed that its deterrence strategy had lost much of its effectiveness.

**2. Weakening Domestic Support and Social Cohesion:** Alongside external pressures, internal dynamics further constrained Tehran's options. Several weeks after the twelve-day war, widespread and violent protests erupted in multiple Iranian cities. Although Iranian officials attributed these demonstrations to "foreign incitement and organization," the protests nevertheless exposed a deepening gap between the state and society.

The emergence of large-scale unrest during a period of external military confrontation suggested that the government lacked cohesive and reliable domestic support. For a political system facing potential confrontation with major powers, the absence of political and social unity represents a serious structural vulnerability.

Moreover, the severe suppression of protests did not resolve underlying grievances. Instead, it highlighted the fragility of domestic stability. Iranian leaders appear to have recognized that



continued escalation could lead not only to infrastructure destruction but also to intensified internal unrest and gradual erosion of regime authority. In this sense, internal instability played a role comparable to external military pressure in reshaping Tehran's strategic assessment.

**3. Economic Strain and Structural Vulnerability:** Simultaneously, economic pressures reached critical levels. Comprehensive sanctions, declining oil revenues, persistent inflation, and widespread public dissatisfaction have placed the Iranian economy in a fragile condition. Under such circumstances, the prospect of further military escalation carries the risk of deepening economic and social breakdown.

For a government already facing domestic protests and diminishing public confidence, entering a full-scale war would represent an exceptionally costly and potentially destabilizing choice. The cumulative economic strain thus significantly increased the perceived costs of sustained confrontation.

**4. Strategic Isolation:** Beyond domestic and economic factors, Iran confronted the reality of strategic isolation. At the height of the crisis, no major power provided direct or practical support to Tehran. Neither Russia nor China appeared willing to risk confrontation with the United States or Israel on Iran's behalf.

This isolation carried a clear implication: in the event of continued escalation, Iran would likely bear the burden of conflict largely alone. Given the asymmetry in economic and military capabilities, such a scenario would present profound risks.

Iran's return to negotiations should therefore be understood as the product of converging pressures rather than a single decisive factor. The weakening of military deterrence, the partial collapse of its regional axis, international isolation, severe economic strain, domestic unrest, and credible U.S. military threats collectively reshaped Tehran's cost-benefit calculations.

When President Trump deployed a major aircraft carrier to the region and signaled the possibility of renewed military action, the prospect of a far larger and more destructive war became increasingly tangible. The potential costs of continued confrontation rose to an unprecedented level. Under these circumstances, diplomacy emerged not as a preferred choice but as a strategic necessity.

In this context, Tehran's return to the negotiating table can be seen less as a concession and more as a recalibration, a pragmatic response to shifting structural realities and escalating risks.



## TRUMP'S DEMANDS FROM IRAN

To assess the probable outcome of negotiations between Iran and the United States, it is first necessary to understand the nature and scope of the demands articulated by President Donald Trump and senior U.S. officials. The agenda presented by Trump extends well beyond a narrowly defined nuclear agreement. Rather, it constitutes a broad package of demands that collectively aim not merely to constrain Iran's nuclear activities but to redefine Iran's regional role and strategic posture.

These demands include the complete dismantlement of Iran's nuclear program; severe restrictions on its missile capabilities, limiting their range to a maximum of 500 kilometers; the termination of support for proxy groups across the Middle East; and even changes in the Iranian government's domestic conduct toward its own citizens. Taken together, this framework suggests a comprehensive transformation of Iran's security doctrine and regional behavior, rather than the resolution of a single technical dispute.

**1. The Demand for Complete Dismantlement of the Nuclear Program:** The first and most central demand concerns the total dismantlement of Iran's nuclear infrastructure. From Washington's perspective, as long as Iran retains enrichment capabilities and the technical infrastructure necessary for nuclear development, it preserves the potential to rapidly approach the threshold of nuclear weapons capability. Thus, the U.S. position reflects a logic of irreversible rollback rather than temporary limitation.

From Tehran's perspective, however, the nuclear program is not merely a scientific or economic project. It is framed domestically as a symbol of national sovereignty, technological advancement, and legal entitlement under international law. Over the past two decades, Iran has borne high political, economic, and security costs to sustain this program. Consequently, accepting its "complete dismantlement" would likely be interpreted internally as a formal acknowledgment of strategic defeat.

A more realistic assessment suggests that Iran might agree to substantial limitations—such as reducing enrichment levels, accepting intrusive inspections, suspending certain activities, or freezing elements of the program. However, full elimination of nuclear infrastructure appears highly improbable, as it would carry profound political and symbolic consequences for the regime.

**2. Missile Restrictions and Strategic Red Lines:** Trump's second major demand—reducing Iran's missile range to 500 kilometers—is arguably even more sensitive than the nuclear issue. Missile capabilities represent, in the eyes of Iranian policymakers, the final pillar of deterrence



against Israel and the United States, particularly in light of the weakening of Iran's regional proxy network.

Limiting missile range to 500 kilometers would effectively deprive Iran of long-range retaliatory capability and significantly erode its strategic deterrent. For Tehran, such a concession would amount to strategic disarmament. It is therefore highly unlikely that Iran would accept such a sweeping restriction.

At most, Iran might consider partial concessions, such as increased transparency, limits on missile testing, suspension of development of specific advanced systems, or commitments not to transfer missile technology to non-state actors. However, a fundamental reduction in missile range would likely be viewed as crossing a core strategic red line.

**3. Ending Support for Proxy Groups:** The third pillar of U.S. demands—the termination of Iranian support for regional proxy groups—presents a comparatively more negotiable domain. Field realities indicate that many of these networks have lost a substantial portion of their former operational capacity, while the financial and political costs of sustaining them have increased.

In this context, Tehran may be more willing to scale back financial and military assistance, restrict the transfer of advanced weaponry, or reduce direct involvement in certain regional arenas. Compared to the nuclear and missile issues, this area aligns more closely with evolving regional realities and could represent a primary zone of potential compromise.

**4. Domestic Political Behavior:** The fourth U.S. demand—changes in Iran's internal governance and treatment of its citizens—introduces a fundamentally political and ideological dimension that extends beyond traditional security negotiations. The Islamic Republic would almost certainly interpret such a demand as overt interference in domestic affairs and reject it in formal terms.

At most, Tehran might implement limited or tactical adjustments aimed at reducing international pressure. Structural or enduring political reforms, however, remain unlikely within the framework of external negotiation.

Taken together, these considerations suggest that the prospects for achieving the maximalist, comprehensive agreement envisioned by Trump appear limited. While selective compromises may be possible—particularly in areas such as regional proxy engagement or partial nuclear restrictions—the structural and symbolic importance of Iran's nuclear and missile capabilities significantly constrains the scope of potential concessions.





As a result, the most plausible outcome of negotiations would likely fall short of a transformative grand bargain. Instead, any agreement—if reached—would probably reflect calibrated mutual adjustments rather than wholesale strategic redefinition.

### WHAT OUTCOME IS MOST LIKELY?

Given the far-reaching nature of U.S. demands—demands that, from Tehran’s perspective, could be interpreted as tantamount to strategic capitulation—it is highly unlikely that Iran would fully comply. This raises a critical question: if negotiations fail and neither side moderates its position, what would be the next course of action for the United States?

In light of prior developments, including the deployment of the aircraft carrier *Abraham Lincoln* to the Arabian Sea and President Donald Trump’s stated intention to dispatch an additional carrier strike group to the region, it appears that the phase of mere rhetorical escalation and incremental sanctions may have been surpassed. The United States would then face the need to calculate its next move within a narrowed strategic space.

**Limited Military Strikes: The Most Probable Escalatory Step** The least severe option would involve limited, targeted strikes against sensitive sites within Iran. This approach would align with the established U.S. behavioral pattern: avoiding the initiation of a full-scale war while employing calibrated military force to compel Tehran to retreat and return to negotiations. Such an option is plausible because it balances coercive pressure with strategic restraint. The objective would not be regime change or territorial occupation, but rather the weakening of specific capabilities and the extraction of political concessions.

**The Possibility of Full-Scale War** At the opposite end of the spectrum lies the possibility of a comprehensive military confrontation. Although Iran retains options—including the potential closure of the Strait of Hormuz and the use of advanced missile systems capable of targeting U.S. bases and possibly naval assets—the overall balance of power remains asymmetrical.

The United States possesses substantial operational advantages: the forward deployment of carrier strike groups in the Arabian Sea; extensive military infrastructure across Qatar, Bahrain, the United Arab Emirates, and Iraq; overwhelming air and naval superiority; and close coordination with Israel, which has demonstrated readiness to act in parallel. Furthermore, Iran’s strategic position has been weakened by recent setbacks. From a technical and operational standpoint, therefore, there appear to be few insurmountable obstacles to a large-scale strike campaign.

Should Trump refuse to scale back his demands, and should Tehran remain unwilling to concede, a broader campaign aimed at degrading Iran’s military and economic infrastructure cannot be entirely ruled out—particularly given reported encouragement from Israeli Prime





Minister Benjamin Netanyahu. However, such a decision would require careful consideration of substantial risks: regional destabilization, disruption of global energy markets, sharp increases in oil prices, the prospect of a prolonged and attritional conflict, and the potential involvement of additional regional or international actors. Even if alternative energy supplies—such as Venezuelan oil—mitigate some market pressures, the broader geopolitical consequences would remain significant.

Absent a willingness to absorb these systemic risks, the more probable pattern would resemble previous episodes: phased, precise, and limited strikes designed to weaken Iran's capabilities and compel negotiation, rather than to overthrow the regime or occupy the country.

**Likely Iranian Responses** In the event of military action, Iran would almost certainly respond. However, the scale and intensity of its retaliation would likely be calibrated to the magnitude of the initial strike.

If subjected to a comprehensive and destructive campaign, Tehran could employ the full spectrum of available options, including attacks on U.S. bases, naval vessels, Israeli territory, and potentially the disruption of maritime traffic in the Strait of Hormuz. Although Iran lacks parity with the combined military power of the United States and Israel and currently faces serious operational constraints, a scenario perceived as existential could prompt maximalist responses. When confronting a perceived boundary between survival and collapse, states often mobilize all remaining capacities.

Conversely, in response to limited and targeted U.S. strikes, Iran's retaliation would likely be symbolic, controlled, and deterrent-oriented—similar to previous episodes. Tehran would aim to demonstrate resolve and preserve credibility without triggering an uncontrollable escalation, particularly actions such as directly sinking a U.S. aircraft carrier, which would almost certainly provoke a disproportionate response.

In sum, while a full-scale war cannot be categorically dismissed, the most plausible trajectory—if negotiations fail—would involve controlled military escalation rather than total war. Both Washington and Tehran appear constrained by structural realities: the United States by the systemic risks of regional conflagration, and Iran by asymmetry of power and internal vulnerabilities. As a result, any confrontation is more likely to remain bounded and instrumental, designed to reshape bargaining positions rather than to produce decisive military victory.

## POSSIBLE SCENARIOS

**Scenario One: A Limited and Phased Agreement:** Given that a military solution would likely impose costs exceeding potential benefits for both parties, the most rational and probable



outcome is a limited, phased, and incremental agreement. Under such an arrangement, Iran would agree to restrict portions of its nuclear program and reduce regional tensions, while the United States would reciprocate through the partial lifting or suspension of sanctions.

Such an agreement would allow both sides to claim strategic gains. President Donald Trump could present it domestically and internationally as a successful containment of Iran's nuclear ambitions, while Tehran could frame it as a breakthrough in alleviating economic pressure and breaking what it characterizes as economic encirclement. This scenario reflects a pragmatic compromise: neither a comprehensive settlement nor a return to full confrontation, but a managed stabilization of tensions.

**Scenario Two: A Comprehensive “Grand Bargain”:** A second scenario involves the conclusion of a comprehensive agreement that fulfills the full spectrum of Trump's demands. In theory, such an outcome is conceivable. In practice, however, it appears highly unlikely.

A sweeping agreement would require a fundamental transformation in the behavioral orientation and strategic doctrine of the Islamic Republic. It would entail deep concessions not only on nuclear and missile capabilities, but also on regional policy and possibly domestic governance. Such structural changes would challenge entrenched power configurations within Iran and run counter to the regime's survival logic and perceived national interests. As a result, while analytically possible, this scenario lacks strong practical feasibility.

**Scenario Three: Collapse of Negotiations and Managed Escalation:** A third scenario involves the breakdown of negotiations and a return to cyclical confrontation. If the United States persists in maximalist demands and Iran refuses substantive concessions, talks could collapse, followed by renewed economic pressure and calibrated military escalation.

Even under these conditions, however, a permanent rupture may be unlikely. The structural costs of a large-scale war—particularly for Iran, but also to a considerable extent for the United States—would likely exceed the costs of selective compromise. Therefore, even if negotiations fail temporarily, the probability of renewed diplomatic engagement at a later stage remains significant. In this sense, confrontation and negotiation may alternate in a cyclical pattern rather than culminate in decisive rupture.

**Scenario Four: Full-Scale War and Regime-Targeted Campaign:** The fourth scenario represents an intensified version of the third: the complete collapse of diplomacy followed by a comprehensive military campaign against Iran. This scenario gains plausibility if recent developments are interpreted as sequential steps in a broader strategic design.

From this perspective, prior actions—such as the weakening of Iran's proxy networks, the twelve-day confrontation that tested Iran's military capacity, the securing of alternative oil



supplies (including from Venezuela) to manage potential energy market disruptions, and the emergence of domestic unrest within Iran—could be viewed as preparatory measures that reduce the risks of a decisive strike. Within this framework, the articulation of maximalist and arguably unattainable demands could also be interpreted not merely as negotiation tactics, but as the construction of a political rationale for war.

Under this scenario, President Trump—potentially in coordination with Israeli Prime Minister Benjamin Netanyahu—could authorize a large-scale military operation aimed not only at degrading Iran's military infrastructure but potentially at destabilizing or overthrowing the regime. It is also conceivable that simultaneous internal unrest could emerge during such a campaign, particularly if military strikes severely weaken state security institutions.

While all four scenarios remain analytically possible, their relative probabilities differ significantly. A limited and incremental agreement appears the most structurally rational outcome, whereas a comprehensive grand bargain remains improbable. Cyclical escalation followed by renewed negotiation represents a realistic fallback pattern. A full-scale war, though not inconceivable, would require a convergence of strategic calculations that justify the acceptance of far-reaching regional and global risks.

Ultimately, the trajectory will depend not only on stated demands but on how each side evaluates the balance between coercion and compromise, risk and restraint, and survival and strategic ambition.

## CONCLUSION

Iran's return to negotiations with the United States does not merely reflect a tactical adjustment; rather, it appears to be the result of a broader erosion in Tehran's deterrence-based strategic calculations. The weakening of proxy networks, the attrition of military capacity, increasing international isolation, and the widening state–society divide have collectively raised the costs of sustained confrontation beyond what the Iranian system can comfortably absorb. In this context, renewed diplomacy represents a recalibration driven by structural pressures rather than voluntary strategic transformation.

At the same time, the maximalist nature of President Donald Trump's demands—ranging from the dismantlement of Iran's nuclear program and missile disarmament to the termination of regional alliances and changes in domestic governance—extends far beyond the nuclear issue itself. Such demands are perceived in Tehran as implying strategic capitulation rather than negotiated compromise. Having already endured direct military pressure from the United States and Israel, Iran now faces a narrowed set of choices: acquiescence to sweeping concessions or resistance grounded in its remaining military and strategic capabilities.



The most rational outcome would involve mutual adjustment. A durable agreement would likely require both parties to moderate portions of their demands and positions. There is a possibility that the United States has advanced expansive demands as a negotiation strategy—articulating maximal objectives to secure a more focused and limited nuclear settlement. In colloquial terms, this resembles demanding “the worst” to settle for “the lesser.”

Nevertheless, the complexity of the issues and the fluidity of regional dynamics create significant room for strategic maneuvering by both sides. Under such conditions, the most plausible outcome may not be a comprehensive settlement nor an all-out war, but rather a fragile and incremental agreement—one that temporarily stabilizes tensions while leaving core disagreements unresolved. This would replicate a familiar cycle: neither transformative peace nor decisive conflict, but managed confrontation punctuated by partial accords.

The worst-case scenario—a comprehensive war aimed at regime change in Iran—remains structurally constrained yet not entirely inconceivable. On the one hand, Iran retains significant missile capabilities and the capacity to impose substantial costs on the United States and its allies, which serves as a deterrent against large-scale invasion. On the other hand, the presence of pretext-based escalation narratives and the unpredictability associated with Trump’s decision-making style mean that such an outcome cannot be categorically excluded.

#### **POLICY RECOMMENDATIONS FOR AFGHANISTAN**

In light of the foregoing analysis, several recommendations may be advanced for the Afghan authorities:

1. The Islamic Emirate of Afghanistan should conduct careful scenario-based assessments and prepare contingency measures to mitigate the political, economic, and security repercussions associated with each possible outcome.
2. Consistent with its current posture, Afghanistan should continue to avoid entanglement in any confrontation between Iran and the United States, maintaining strategic neutrality and minimizing exposure to external conflict dynamics.

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