

# WEEKLY ANALYSIS

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## THE CONFRONTATION BETWEEN THE UNITED STATES, ISRAEL, AND IRAN: DRIVERS AND PROSPECTS

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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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Center for Strategic and Regional Studies (CSRS)



## THE CONFRONTATION BETWEEN THE UNITED STATES, ISRAEL, AND IRAN: DRIVERS AND PROSPECTS

With mediation reportedly facilitated by Pakistan, the armed confrontation between the United States, Israel, and Iran—after nearly forty days of hostilities—has been temporarily halted through a two-week ceasefire. What is clear, however, is that this ceasefire merely pauses the conflict rather than resolving its underlying causes. The central question, therefore, is what lies ahead: can the current ceasefire mark a durable end to the confrontation, or is a resumption of hostilities more likely? A meaningful answer requires examining the root causes of the conflict, assessing how it has unfolded, and evaluating whether the core demands of the parties involved can be met.

### CAUSES OF THE CONFLICT

The military actions undertaken by the United States and Israel against Iran—reportedly in two phases—are rooted in several key issues. The foremost among these is Iran’s nuclear program. Over the past two decades, Iran has sought to join the ranks of countries possessing advanced nuclear technology. While Tehran has consistently maintained that its nuclear program is peaceful in nature, both the United States and Israel believe that Iran is pursuing nuclear weapons capabilities under the guise of civilian development.

This concern led the International Atomic Energy Agency (IAEA) to refer the matter to the United Nations Security Council, resulting in the imposition of international sanctions on Iran. After multiple rounds of negotiations between Iran and the P5+1 countries, the Joint Comprehensive Plan of Action (JCPOA) was signed in 2016. Although this agreement was endorsed by the Obama administration, the United States unilaterally withdrew from it in 2018 under President Donald Trump. Trump argued—largely in alignment with Israeli concerns—that allowing Iran to continue uranium enrichment could enable it to covertly advance toward nuclear weapons capability.

Beyond the nuclear issue, the lifting of sanctions under the JCPOA was expected to facilitate Iran’s economic growth. Critics, particularly within the Trump administration, feared that a stronger Iranian economy would enable Tehran to expand its missile program and strengthen allied groups across the Middle East. Consequently, the nuclear issue was used as a basis to maintain and intensify sanctions. In response, Iran accelerated and expanded its nuclear activities. Following Trump’s return to power, a strategy combining sanctions, threats, negotiations, and ultimately military action was pursued against Iran.

A second major point of contention is Iran’s missile program. The development of advanced missile capabilities is viewed by the United States and Israel as a direct threat—both to Israel’s



security and to American interests in the region. Although this issue has been repeatedly raised by U.S. and Israeli officials, it has not been formally incorporated into negotiation frameworks. Nevertheless, during past talks, some U.S. officials proposed limiting Iran's missile range to approximately 500 kilometers. Iran has firmly rejected such proposals, and this refusal may be considered another contributing factor to the outbreak of hostilities.

A third critical issue is Iran's support for non-state armed groups across the Middle East. Organizations such as Hezbollah in Lebanon, the Popular Mobilization Forces in Iraq, and the Houthis in Yemen—collectively referred to by Iran as the “Axis of Resistance”—are widely believed to receive direct support from Tehran. These groups have increasingly challenged both Israeli security and U.S. interests in the region. This has been a source of significant concern, particularly for Donald Trump, who has argued that countering these groups requires targeting their principal source of support—Iran itself. This approach is often described in political discourse as “striking the head of the snake.”

#### **ASSESSMENT OF THE COURSE OF THE WAR**

Given that Iran refused to accept any of President Trump's demands across all three major areas—its nuclear program, missile development, and support for regional allied groups—the United States faced two broad options: either continue applying economic pressure without achieving meaningful results, or attempt to resolve the issue through military means. As events showed, Trump ultimately chose the military option as the decisive tool.

The first phase of the conflict consisted of a twelve-day war initiated by Israel, during which the United States carried out a limited operation targeting three Iranian nuclear sites. The second phase, however, evolved into a broader and more sustained campaign lasting over a month, conducted jointly by the United States and Israel. Throughout both phases, Iran was subjected to extensive airstrikes launched from land and sea. These attacks inflicted significant damage and reportedly resulted in the loss of key figures within Iran's leadership structure—including senior military commanders, members of the National Security Council, and advisors to the Supreme Leader.

The apparent objective behind targeting Iran's leadership was to weaken its military capacity while simultaneously destabilizing the political system. The underlying assumption was that removing top decision-makers would lead to internal disintegration and possibly the collapse of the government. However, this expectation did not materialize. On the contrary, despite these losses, Iran maintained operational continuity without visible signs of institutional breakdown. It responded across multiple fronts by deploying its extensive arsenal of drones and missiles, targeting both Israeli positions and U.S. military bases across the region.



Beyond the military stalemate, a key development that shifted the dynamics of the conflict in Iran's favor was the closure of the Strait of Hormuz. This move provided Iran with several strategic advantages. First, it pushed the global energy market toward a potential crisis, thereby increasing pressure on the United States. Second, it discouraged other U.S. allies—particularly within NATO—from becoming directly involved in the conflict. Third, it created a source of revenue for Iran through the imposition of transit-related measures. Fourth, it compelled the United States to ease certain oil-related sanctions to mitigate the risk of a broader energy crisis.

As a result, while Iran was able to continue exporting its oil through the strait, other actors faced restrictions, and the United States found itself with limited immediate options to alter the situation. The combination of a military stalemate and the economic consequences of the Strait's closure ultimately led Trump to issue a series of ultimatums demanding its reopening.

In his final warning, Trump threatened that if Iran did not reopen the Strait and agree to enter negotiations—hosted by Pakistan—the United States would target critical infrastructure across Iran, including energy facilities, rail networks, and bridges. Before this, a major bridge near Karaj, reportedly one of the largest in the Middle East, had already been struck and destroyed. In response, Iran's Islamic Revolutionary Guard Corps warned that any attack on its energy infrastructure would trigger widespread retaliation against energy systems throughout the Middle East, potentially causing long-term regional disruption.

In the final hours before the expiration of the ultimatum, Tehran announced its acceptance of a two-week ceasefire and agreed to reopen the Strait of Hormuz to all maritime traffic during this period.

### **THE PAKISTAN NEGOTIATIONS**

Shortly after the ceasefire was declared, direct and intensive negotiations began in Pakistan. The U.S. delegation was led by Vice President J.D. Vance, while Iran's delegation was headed by Mohammad Bagher Ghalibaf. Despite several hours of discussions, the talks ended without any agreement.

It became evident that these negotiations—and likely any future ones—would face serious obstacles due to the fundamental differences in the parties' positions. Washington seeks an Iran that is entirely free of nuclear capabilities and long-range missile systems. In contrast, Tehran considers both uranium enrichment and the development of long-range missile capabilities to be its sovereign and non-negotiable rights.

From the perspective of the United States and Israel, an Iran equipped with such capabilities represents a direct and potentially existential threat. For Iran, however, these same capabilities



are viewed as essential for national survival and long-term development. This creates a zero-sum dynamic in which any concession by one side would carry high strategic costs: for Israel, the prospect of living under constant threat from a hostile power; for the United States, the risk to its critical regional interests; and for Iran, concerns over its very survival.

Under these conditions, negotiations appear unlikely to produce meaningful results. At the same time, the conflict has demonstrated that even military force—used as a last resort—has not been able to decisively resolve the dispute. This leads to a critical question: what does the future hold?

### **FUTURE OUTLOOK OF THE CURRENT SITUATION**

In response to the question posed above, and in light of the dynamics already discussed, several broad scenarios can be identified regarding the future trajectory of the conflict:

The first scenario is that the United States and Israel may once again resort to large-scale military action. In such a case, they could employ significantly greater force, potentially including the use of tactical nuclear weapons, with the aim of either destroying Iran's capabilities or compelling it to submit to their demands. Although the United States and Israel possess considerable military strength, as well as the economic and logistical capacity to sustain an extended campaign, this option faces serious limitations that undermine its overall feasibility.

First, Iran demonstrated during the roughly forty-day conflict that its political system is resilient and unlikely to collapse under external pressure. Moreover, it showed a substantial القدرة to retaliate at scale. While Iran may lack the ability to directly strike the U.S. mainland, it retains the capacity to target Israel and critical American interests across the Middle East. Second, Iran's control over the Strait of Hormuz gives it the ability to disrupt the global economy, creating an energy crisis that would also significantly harm the United States. Third, the previous military campaign failed to produce decisive results; repeating the same approach would likely lead to a costly and ineffective cycle. If Iran continues to enhance its defensive capabilities—particularly in air defense, as suggested by its reported downing of advanced aircraft near the end of the conflict—the outcome could even turn against its adversaries.

The second scenario involves a hybrid strategy combining intensified economic pressure with limited, long-range, and intermittent military strikes. Under this approach, the United States would seek to draw Iran into a prolonged war of attrition, aiming to weaken it gradually until its government either collapses or is forced to concede. However, this option also carries significant drawbacks. A protracted conflict could have a “boomerang effect,” meaning that the costs and pressures of sustained engagement would also weigh heavily on the United



States. For instance, continued disruption of the Strait of Hormuz and the resulting economic consequences could generate reverse pressure on Washington itself.

The third scenario, which has also been discussed, is the imposition of a naval blockade on Iran. This strategy would aim to further isolate Iran economically by preventing ships from accessing its ports. Yet, this option appears counterproductive. The central challenge already facing the United States is the disruption of the Strait of Hormuz. A naval blockade would likely exacerbate this problem, deepening the very crisis Washington is attempting to resolve—namely, the restoration of stable maritime and energy flows.

Another possible option would be for the United States to declare victory and disengage. While this might have served as a face-saving measure before the negotiations, it has become less viable following the failure of diplomatic talks. Such a move would likely be interpreted both as a retreat from the battlefield and a withdrawal from the negotiating table, signaling concession rather than success.

Despite the limitations associated with all of these scenarios, it is important to recognize that, given their strategic objectives, the United States and Israel are unlikely to abandon their broader approach toward Iran. It is possible that they may continue to pursue their goals at considerable cost. At the same time, there remains the risk that, rather than Iran, they themselves could ultimately bear the consequences of an escalating conflict.

In contrast to these largely zero-sum scenarios, a final and more constructive option would involve a shift toward a “win-win” approach. This would require both sides to move beyond maximalist demands—where one side’s gain is perceived as the other’s loss—and instead engage in pragmatic negotiations based on mutual concessions. This scenario appears both desirable and increasingly plausible for several reasons.

First, the military option has effectively reached a deadlock, and any renewed reliance on it would likely result in significant destruction for all parties involved. Second, both the closure of the Strait of Hormuz by Iran and the prospect of a naval blockade by the United States carry severe economic consequences for both sides. Third, a unilateral declaration of victory would neither justify the immense human and material costs of the conflict nor address its root causes.

Importantly, recent developments suggest a degree of mutual restraint. For example, following the failure of the initial round of negotiations in Pakistan, the United States refrained from launching further attacks on Iran’s energy infrastructure. This indicates a growing recognition on both sides that a sustainable resolution is unlikely to be achieved through military means alone, and that diplomacy remains the most viable path forward.



## CONCLUSION

The confrontation between the United States, Israel, and Iran—now paused under a fragile ceasefire and accompanied by inconclusive negotiations—stems from a fundamentally zero-sum strategic dynamic. The United States and Israel seek a “neutralized” Iran: one without nuclear technological capacity, deprived of advanced long-range weapons, and with minimal regional influence. From Iran’s perspective, however, accepting such conditions would amount to the dismantling of its technological, military, and political capabilities, ultimately placing the state on a path toward strategic vulnerability and possible collapse.

In principle, diplomacy and negotiation—grounded in mutual understanding and a win-win logic—are designed to resolve conflicts. Yet in a context defined by zero-sum calculations, their effectiveness becomes limited. It is for this reason that military force emerged as the preferred instrument of resolution. The strategic assessment in Washington and Tel Aviv appears to have been that targeting Iran’s leadership and command structure, alongside the destruction of its military and economic infrastructure, would lead to systemic collapse. However, despite the loss of senior leadership figures and high-ranking commanders, this outcome did not materialize. Instead, Iran demonstrated institutional resilience and responded rapidly and forcefully with significant military retaliation.

In addition to the military stalemate, the closure of the Strait of Hormuz has further complicated the situation, rendering conventional policy options increasingly ineffective. While several scenarios remain conceivable—including renewed military campaigns (short of unconventional escalation), intensified sanctions, or expanded naval restrictions—none appear capable of breaking the current deadlock in a sustainable manner.

Therefore, the most viable path forward lies in a return to diplomacy, grounded not in maximalist demands, but in a pragmatic, win-win framework. Only such an approach offers a realistic opportunity to de-escalate tensions, address core concerns on both sides, and prevent further destabilization at both the regional and global levels.

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