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Part -1

The US-Iran Memorandum of Understanding: A Tactical Pause or the Beginning of a New Regional Order? A Geopolitical Analysis

Introduction

Reports of a possible Memorandum of Understanding (MoU) between the United States and the Islamic Republic of Iran have generated considerable international interest and widespread speculation regarding the future of one of the Middle East's most enduring geopolitical rivalries. Whether such an understanding ultimately materialises or remains a temporary diplomatic initiative, it raises important questions extending far beyond bilateral relations. Its implications touch upon regional security, global energy markets, maritime trade, the future of sanctions, the role of regional allies, and the evolving balance of power in an increasingly multipolar international system.

This article does not seek to predict the outcome of the reported negotiations or advocate the position of any government. Rather, it examines the broader strategic environment within which these developments are taking place. Drawing upon publicly available reports, historical experience and contemporary geopolitical analysis, it argues that any Memorandum of Understanding, if concluded, should be viewed not as an isolated diplomatic event but as one element within a far more complex regional and international landscape. Lasting stability will depend not merely upon agreements between Washington and Tehran, but upon whether the wider political, security and humanitarian challenges that have shaped the Middle East for decades are addressed through genuine diplomacy and an inclusive regional framework.

I – The Strategic Context

The prospect of a Memorandum of Understanding (MoU) between the United States and the Islamic Republic of Iran has once again focused international attention on one of the world's most consequential geopolitical rivalries. Whether such an understanding ultimately materializes or remains an exercise in diplomatic exploration, the very existence of negotiations reflects an important strategic reality: neither prolonged confrontation nor military escalation has succeeded in producing a decisive outcome acceptable to either side.

For more than four decades, relations between Washington and Tehran have been characterized by mutual distrust, economic sanctions, proxy conflicts, diplomatic isolation, and periodic military crises. Yet despite repeated predictions of imminent confrontation or regime collapse, the Islamic Republic has endured. Likewise, successive American administrations have found that maximum pressure, while imposing significant economic costs on Iran, has not fundamentally altered Tehran's strategic posture.

Recent reports suggesting that the United States and Iran have explored a new Memorandum of Understanding should therefore be viewed within this broader historical context rather than as an isolated diplomatic event. If accurate, such discussions may represent less a dramatic reconciliation than an attempt by both sides to reduce immediate risks while preserving their long-term strategic positions.

One of the recurring assumptions in international commentary has been that sustained military pressure, economic sanctions, or political isolation would eventually produce a fundamental transformation of Iran's political system. Some observers even suggested that external military intervention could facilitate regime change and pave the way for a government more closely aligned with Western interests.

Such expectations, however, have consistently underestimated several enduring characteristics of the Iranian state and society.

Iran possesses one of the oldest continuous civilisations in the world. Throughout its long history, the country has experienced foreign invasions, imperial competition, revolutions, and prolonged wars while preserving a strong sense of national identity. Modern Iranian political divisions are often intense, but external pressure has frequently strengthened rather than weakened nationalist sentiment across diverse segments of society.

This historical resilience has been reinforced by decades of economic sanctions and strategic isolation. Rather than eliminating Iran's capacity to act, these pressures encouraged significant investment in domestic industries, indigenous military production, missile technology, and asymmetric defence capabilities. Although sanctions have undoubtedly imposed severe economic hardship on ordinary Iranians, they have also accelerated efforts to reduce dependence on external suppliers in several strategic sectors.

These developments do not imply that Iran has become immune to economic or political challenges. Rather, they suggest that expectations of a rapid political transformation through external pressure alone have not been borne out by events.

At the same time, the United States has also confronted changing strategic realities. Washington's foreign policy priorities have evolved considerably over the past decade. Great-power competition with China, the continuing conflict in Ukraine, domestic political divisions, fiscal pressures, and growing public fatigue with prolonged military engagements abroad have all influenced American strategic calculations.

Within this broader context, reducing the risk of another major military conflict in the Middle East may serve important American interests irrespective of which political party occupies the White House.

This does not necessarily indicate a fundamental change in American objectives. Rather, it may reflect a reassessment of the costs associated with continued escalation compared with the potential benefits of limited diplomatic engagement.

An equally important factor concerns the broader regional balance of power.

The Middle East has undergone profound changes over the past decade. Several regional powers have diversified their diplomatic partnerships, expanded economic cooperation with emerging global actors, and pursued more independent foreign policies than in previous decades. These shifts have gradually reduced the effectiveness of traditional zero-sum approaches to regional security.

Against this backdrop, any understanding between Washington and Tehran would likely be motivated by practical considerations rather than ideological convergence. Diplomatic agreements between adversaries are often born not from mutual trust but from mutual recognition that uncontrolled escalation serves neither side's long-term interests.

This distinction is important because it helps explain why many analysts remain cautious.

A Memorandum of Understanding differs fundamentally from a comprehensive peace treaty. An MoU generally establishes principles for cooperation, confidence-building measures, or temporary arrangements without resolving the deeper political disputes that divide the parties. It may reduce immediate tensions, create channels of communication, or establish mechanisms for crisis management, yet it rarely settles the underlying strategic disagreements.

Consequently, even if an agreement were to be signed, it should not automatically be interpreted as the end of regional competition between the United States and Iran.

The nuclear question, economic sanctions, regional security arrangements, proxy conflicts, and competing strategic visions would all remain subjects of continuing negotiation and disagreement.

This distinction between conflict management and conflict resolution may ultimately prove to be one of the most important themes in understanding the present diplomatic moment.

The apparent willingness of both governments to explore dialogue may therefore represent a recognition that stability, even if temporary, offers greater immediate advantages than continued escalation. Such calculations are not uncommon in international relations. History contains numerous examples of rival powers reaching limited understandings to prevent crises from spiralling beyond their control while leaving their broader strategic competition unresolved.

Whether the current diplomatic efforts represent such a tactical pause or the first stage of a more durable regional realignment remains uncertain.

That uncertainty becomes even more significant when one considers that the negotiations involve more actors than those formally seated at the negotiating table. Regional allies, non-state armed groups, domestic political institutions, and external powers all possess the capacity to influence whether any agreement succeeds or fails.

Moreover, even if a Memorandum of Understanding were successfully concluded between Washington and Tehran, it would not by itself resolve the wider crises that continue to shape the strategic landscape of the Middle East. The future of the Palestinian people, the humanitarian devastation in Gaza, the future of economic sanctions on Iran, the security concerns surrounding Yemen and Hezbollah, and the evolving political situation in Syria all remain interconnected

issues. Whether or not they form part of the immediate negotiations, they will inevitably influence the durability of any regional settlement. A lasting peace is unlikely to emerge unless these underlying questions are addressed through sustained diplomacy and a broader regional framework.

It is precisely this wider strategic environment that will determine whether a Memorandum of Understanding can evolve into lasting stability or merely postpone another cycle of confrontation.

In the next part of this series, we examine the role of the principal regional actor not formally participating in the reported negotiations—Israel—and explore why developments in Lebanon, military operations against Hezbollah, and Israel's independent security doctrine may ultimately prove decisive in determining the future of any US-Iran diplomatic understanding.

II-Israel, Lebanon and the Challenge to Regional Diplomacy

If the reported negotiations between the United States and Iran represent an attempt to reduce regional tensions, one critical question immediately arises: can such an understanding succeed without the active participation of one of the region's most influential security actors?

This question lies at the heart of the current diplomatic landscape.

Although Israel is not reported to be a direct participant in any negotiations between Washington and Tehran, its security policies, military capabilities and strategic calculations remain central to the prospects for any lasting regional settlement. In modern geopolitics, agreements are often shaped not only by those who sign them but also by those whose actions can determine whether they endure.

For decades, Israel has maintained that it reserves the right to act independently whenever it perceives threats to its national security. This principle has been reflected in successive governments' policies and has remained largely unchanged regardless of political leadership. Military operations against organisations such as Hezbollah have therefore been viewed in Israel as matters of national defence rather than subjects requiring international approval.

Whether one agrees with this doctrine or not, its practical implications are significant.

A bilateral understanding between Washington and Tehran cannot by itself prevent military developments elsewhere in the region from altering the strategic

environment. Events on the ground frequently move more rapidly than diplomatic negotiations, and military realities often influence political calculations more profoundly than carefully negotiated communiqués.

This dynamic has become particularly evident in Lebanon.

Recent military operations, exchanges of fire across the Israeli-Lebanese border, and continuing tensions involving Hezbollah demonstrate that regional security remains highly interconnected. Each military action has the potential to trigger responses extending well beyond the immediate theatre of operations. Consequently, developments in Lebanon cannot be viewed in isolation from wider diplomatic efforts involving the United States and Iran. As long as Israel is benefitted from US support politically, militarily and financially the conflict will continue to an unknown period.

Many analysts argue that as long as Israel continues to receive substantial political, military, and financial support from the United States, the incentives for a fundamental change in the regional security dynamic may remain limited. Consequently, the conflict could persist for an extended and uncertain period unless broader political solutions accompany military and diplomatic initiatives.

Some analysts have argued that these parallel developments reveal an important contradiction. On one hand, diplomacy seeks to reduce tensions between Washington and Tehran. On the other, military activity involving regional actors continues to generate new risks of escalation. If these two trajectories move in opposite directions, the durability of any diplomatic understanding may become increasingly uncertain.

Among the commentators advancing this argument is geopolitical analyst Clearance Frame, who has suggested that developments in Lebanon may ultimately prove as significant as the formal negotiations themselves. In this view, the principal challenge is not simply whether an agreement can be reached, but whether conditions on the ground will permit such an agreement to survive.

This distinction deserves careful consideration.

History demonstrates that diplomatic agreements do not exist in isolation. They operate within broader political and military environments that can either reinforce or undermine their implementation. A ceasefire, memorandum, or political declaration may reduce immediate tensions, but it cannot automatically eliminate the strategic rivalries that gave rise to the conflict in the first place.

For this reason, many observers distinguish between conflict management and conflict resolution.

Conflict management seeks to reduce violence, prevent escalation, and create opportunities for dialogue. Conflict resolution, by contrast, requires addressing the underlying political disputes that sustain instability. The two concepts are related, but they are not synonymous.

If current diplomatic efforts result in a Memorandum of Understanding, they may represent an important achievement in conflict management. Yet such an outcome should not necessarily be interpreted as the resolution of the broader strategic competition shaping the Middle East.

Another important consideration concerns the diversity of interests among America's regional partners.

Although the United States and Israel have maintained a close strategic relationship for decades, their immediate priorities do not always coincide. Governments facing different domestic political pressures, security assessments and regional objectives may adopt different approaches to managing common challenges.

Such differences should not automatically be interpreted as evidence of strategic division. Rather, they reflect the reality that allies often pursue shared long-term objectives through different tactical approaches.

Iran likewise operates within a complex regional environment.

Its relationships with Hezbollah, regional armed groups, neighbouring governments and allied political movements have evolved over many years. These relationships form part of Iran's broader regional security strategy and influence how Tehran assesses both military risks and diplomatic opportunities.

Consequently, any understanding between Washington and Tehran inevitably extends beyond bilateral relations. It touches upon a wider network of regional actors whose decisions may significantly influence the success or failure of diplomatic initiatives.

The humanitarian dimension should also not be overlooked.

The continuing suffering of civilians in Gaza, the displacement of populations affected by conflict, instability in Lebanon, and the humanitarian consequences of prolonged regional confrontation all underscore the human cost of geopolitical rivalry. Durable peace ultimately depends not only upon strategic deterrence but also upon addressing the conditions that perpetuate instability and human suffering.

For this reason, many analysts argue that sustainable regional stability cannot rest exclusively upon military deterrence or temporary political understandings. It requires broader diplomatic engagement capable of addressing multiple interconnected disputes simultaneously.

This broader perspective returns us to the central question posed at the beginning of this analysis.

Can a bilateral understanding between Washington and Tehran provide the foundation for wider regional stability, or will it merely pause one dimension of a far more complex geopolitical competition?

The answer will depend not solely upon the text of any Memorandum of Understanding, but upon whether regional actors choose to reinforce diplomatic momentum or allow continuing military confrontations to overshadow it.

In the next part of this series, we examine the strategic importance of the Strait of Hormuz, the global economic implications of regional stability, and the domestic political calculations in Washington, Tehran and Jerusalem that may ultimately determine whether diplomacy can outlast confrontation. **(to be continued)**