

Back to Bombs or Driving to a Deal? Assessing the U.S.-Iran State of Play

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Brief Analysis

Three experts discuss the fallout from the latest military strikes, along with the potential contours and implications of a newly announced agreement to halt the fighting and reopen the Strait of Hormuz.

On June 11, The Washington Institute held a virtual Policy Forum with Dana Stroul, Robert Satloff, and Michael Singh. Stroul, the Institute's director of research and Kassen Senior Fellow, formerly served as deputy assistant defense secretary for the Middle East. Satloff is the Institute's Segal Executive Director and Howard P. Berkowitz Chair in U.S. Middle East Policy. Singh, the Institute's managing director and Steven D. Levy Senior Fellow, formerly served as senior director for Middle East affairs at the National Security Council. The following is a rapporteurs' summary of their remarks.

Dana Stroul

The nominal ceasefire between the United States and Iran has been characterized by continued military activity rather than a true cessation of hostilities. U.S. Central Command has maintained an elevated posture across the Middle East, implementing robust force protection measures, escorting commercial vessels through the Strait of Hormuz, conducting battlefield damage assessments in case there is a return to war, and enforcing a naval blockade on all Iranian imports and exports, including oil. For its part, Tehran continues to challenge freedom of navigation through the strait with drones, mines, and other residual asymmetric capabilities. It also downed a U.S. military helicopter that was likely involved in commercial escorts. U.S. forces responded to the latter incident with renewed strikes, sending an important signal that attacks on American assets will draw a forceful response.

In addition, the Trump administration is once again publicly threatening to seize Kharg Island, and recent strikes have likely reinforced President Trump's perception that military pressure is working. Yet this idea would carry substantial risks for U.S. forces. Although Operation Epic Fury degraded Iran's conventional capabilities, analysts disagree on the extent of the damage, and Iran could still threaten any U.S. forces holding Kharg Island with irregular maritime forces as well as rocket and drone launches from the mainland. Moreover, the practical value of seizing the island may be limited—Iran's oil exports are already severely constrained by the naval blockade, and the regime has repeatedly demonstrated its ability to withstand heavy economic pressure.

Regarding the diplomatic track, the latest exchange of strikes has not altered the core parameters of the negotiations. Previously, discussions focused on restoring freedom of navigation in the Strait of Hormuz, setting the stage for future talks on Iran's nuclear program, and considering the possibility of limited sanctions relief. Although communication with Iran's leadership has become more difficult due to security concerns and internal regime dynamics, recent strikes have not significantly changed the underlying issues.

Beyond Iran, other regional security challenges remain unresolved. In Lebanon, government forces have the operational capability to disarm Hezbollah but face significant political and economic constraints. The central obstacle remains political will, as many Lebanese leaders fear that trying to seize the group's weapons could trigger a civil war. Any serious disarmament effort will require the international community to sustain major financial and political support. Verification of the military's progress on this mission will be critical as well—though policymakers should be wary of any calls for U.S. deployments into the proposed "pilot zones" in south Lebanon, since this would expose American forces to attacks by Hezbollah and introduce serious operational challenges for the Israel Defense Forces, who are still under fire.

In the Gulf states, the prospect of renewed war remains deeply concerning. Although their missile interception rates have been high throughout the conflict, the few projectiles that did penetrate their defenses caused substantial damage. Gulf economies built on stability, open trade, and secure investment environments remain quite vulnerable to prolonged conflict. As a result, these partners favor a deal that reopens the strait and avoids a return to large-scale hostilities.

Looking ahead, Iranian leaders have now seen that the United States is willing and able to use ample force if necessary. Yet the challenges raised by prolonged deployments, rising energy costs, and competing global priorities will make it difficult to maintain the current posture. The war's ultimate outcome will depend on sustained U.S. military pressure and diplomatic engagement. If regional partners lose confidence in Washington's long-term commitment to the region, they may hedge by pursuing accommodations with Tehran.

Robert Satloff

Before the latest exchange of direct strikes, Lebanon was the battleground where Iran tried to drive a wedge between Washington and Jerusalem, redefine the rules of engagement governing Hezbollah and Israel, and gain diplomatic advantages toward a new U.S.-Iran deal. Two factors made Lebanon an especially attractive target for Tehran: President Trump's on-again/off-again support for separating the Lebanon-Israel and U.S.-Iran tracks, and his apparent anxiety that Israeli military responses to Hezbollah attacks could derail his Iran diplomacy. Tehran's latest escalation began by tasking Hezbollah with attacking northern Israel, then evolved into direct Iranian ballistic missile attacks. President Trump publicly urged restraint; Israel's response was noticeably scaled down but firm enough to convince Tehran to back down.

Notably, the limited nature of Iran's latest attack on Israel—just eleven missiles—underscored its current weakness when compared to the hundreds of missiles it was able to fire in previous rounds. Moreover, Israel's strong response—coupled in the end with U.S. support for keeping the Lebanon track independent—stymied Iran's plan.

As observers wait for details on the purported new deal between Washington and Tehran, few expect it to reflect previous objectives articulated by the Trump administration. Clearly, the outcome is neither "unconditional surrender" nor "regime change." And it remains to be seen whether the agreement addresses such important issues as Iran's missile program, nuclear program, support for violent proxies, and pressure to include the Lebanon track. In all likelihood, the deal will amount to an extension of the current ceasefire, with the important addition of resolving the Strait of Hormuz issue. If this minimalist outcome does in fact come to pass, it will strike fear among Israel's leaders, since such a deal would leave many critical issues unresolved and pose a huge political problem for Prime Minister Binyamin Netanyahu.

Michael Singh

To assess the prospects of the newly announced deal with Iran, one must acknowledge both the current state of play and the historical context. As President Trump himself has noted, Middle East ceasefires often reflect a statement of intent rather than a halt to all violence. Iran and the United States have held successive rounds of talks over the years, often featuring the same Iranian negotiators facing multiple American administrations. As such, Tehran has developed a consistent set of diplomatic tactics, one of which is to drive a wedge between the United States and Israel. President Trump will face criticism for any deal he signs, and it will be in Iran's interest to undermine his relationship with the most strident critics, particularly Prime Minister Netanyahu.

Tehran and Washington are broadly following similar playbooks—that is, maintaining the option of escalation to ensure that the status quo is militarily and economically unbearable, and pressuring their adversary into negotiations. War is negotiation by other means, and vice versa, so the eventual outcome of this crisis will depend not only on military edge, but also on each population's ability to endure hardship. Both sides believe time is on their side. Tehran believes the upcoming midterm elections will exert political pressure on the Trump administration, and that the United States cannot bear economic pain; Washington is speculating that the blockaded regime is on the brink of economic collapse.

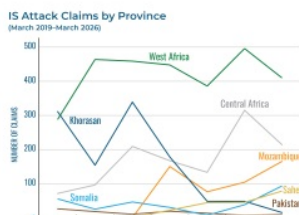
In his previous efforts to break the stalemate, President Trump issued bombastic threats against power plants, bridges, and other civilian infrastructure, which Tehran did not appear to view as credible. Over the past forty-eight hours, however, he has begun to apply increasing military pressure, which Iran has seemingly taken more seriously than his earlier bluster.

The new agreement likely rests on a central trade-off: Iran opening the Strait of Hormuz in exchange for the United States lifting its blockade of Iranian ports. It probably does not address missiles and drones. Nor is it likely to include more than a statement of intent regarding the nuclear issue and a window of thirty to ninety days for further negotiations on that file. The answers to other key questions remain uncertain: Will traffic through the strait face tolls? Will the United States lift sanctions on Iranian oil?

President Trump will face criticism domestically if the actual deal resembles these contours, since Iran will have seemingly extracted significant concessions in exchange for opening a waterway that was open before the war. In reality, however, the United States is in a much stronger position now than when the war began. Iran is no longer in a position to enrich uranium or access its stockpile of already enriched material, meaning the most urgent aspects of the nuclear threat were effectively addressed in the conflict's early days. Once the pressure caused by the Hormuz closure is eased, there will be time for the Trump administration to fully address the nuclear issue and other important matters, from negotiating on Iranian missiles, drones, and proxies to rebuilding the Lebanese state. The message from Washington should be that this has been a limited engagement rather than an endless war, which was in line with the administration's intent. At the same time, the U.S. military should remain present and ready, either to ensure that the strait reopens smoothly or in case the broader negotiations fail and conflict resumes.

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