



**OPEN NUCLEAR
NETWORK**

Nuclear Risks Matter

Project
Loop

SPECIAL MONITORING REPORT

IRAN



The Iran War

Stakeholder Positions and Prospects
for a Future Nuclear Agreement

Benjamin Ashraf

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Executive Summary

BOTTOM LINE: A comprehensive, JCPOA-style agreement between the United States and Iran **remains unlikely** by the end of 2026. A more plausible near-term outcome is a narrow, unstable arrangement to reduce immediate nuclear and maritime risks: limiting the risk of further Iranian disengagement from NPT-related commitments, establishing minimal IAEA access and verification arrangements, and reducing disruption to commercial and energy shipping through the Strait of Hormuz.

Broader disputes over sanctions, regional security, missile capabilities, force posture, and Iran's nuclear programme are more likely to be managed temporarily than resolved. Without a credible, implementable diplomatic framework, **episodic or gradual escalation** is more likely than stable deadlock.

MOST CREDIBLE NEAR-TERM RISK: Further disruption to shipping through the Strait of Hormuz could trigger reciprocal attacks on military, energy, and other strategic infrastructure, increasing the risk of an escalatory cycle. A renewed US strike on Iranian nuclear-related infrastructure, including reported facilities or material associated with Pickaxe Mountain, an uninspected underground site, should be treated as a high-impact contingency rather than the baseline expectation.

ASSESSED UNLIKELY: Neither the United States nor Iran seeks an open-ended expansion of the conflict beyond coercive bargaining over the Strait of Hormuz and related political-security demands. Both sides have shown a willingness to impose costs and accept escalation risks, but that is not the same as an appetite for full-scale war. Nor has the existing diplomatic framework generated sufficient reciprocal confidence, implementation, or momentum for either side to rely on it as a durable basis for de-escalation. The result is continued zero-sum bargaining in which limited tactical understandings remain possible, but a wider political settlement does not.

CONFIDENCE & BIAS: Medium confidence, reflecting continuous monitoring, open-source reporting, ONN Project Loop forecasting exercises, and expert input from ONN's Advisory Council.

KEY FINDINGS

United States

The United States **narrowed its immediate military and negotiating objectives** relative to broader early-war rhetoric, including support among some US political actors for regime change. From February to July, Washington's stated priorities softened to include durable and verifiable limits on Iranian enrichment and other nuclear activities, reduced threats to regional security and commercial shipping through the Strait of Hormuz, and credible assurance that Iran is not acquiring a nuclear weapon. This shift was reflected in the June 2026 Islamabad MoU, which dropped earlier demands for full export of Iran's enriched stockpile of highly enriched uranium in favour of in-country dilution under IAEA monitoring. However, this flexibility has since reversed.

The US initially signalled openness to whether zero enrichment would be permanent or time-limited, and later accepted deferring the final enrichment arrangement to follow-on negotiations; however, it did not publicly accept an ongoing Iranian enrichment programme. This was never finalised and, after the breakdown of the June MoU, the US position on Iran's nuclear program has since hardened: the US has since pushed the IAEA Board to report Iran's non-compliance to the UNSC for the first time in 20 years, with talks stalled and significant US naval and air presence in the region. Treat any "compromise" framing as a negotiating window rather than the current US posture on an Iran nuclear agreement.

Iran

Iran has likely converted battlefield and regime survival into a negotiating position stronger than its military and economic circumstances alone would suggest. Emad Kiyaei, Director of the Middle East Treaty Organisation, told ONN that the war has "fundamentally changed how the region is, how the region will be;" it has fragmented the pre-war "power structures."

This leverage derives in part from Iran's ability to retain influence over escalation dynamics and preserve bargaining options despite substantial pressure. However, it does not remove Iran's underlying military and economic vulnerabilities. Kiyaei framed this as a pattern of reaction rather than need, which he attributed to repeated US bad faith in negotiations: "It's not that Iran needs a deal...whatever the US does coercively, Iran will respond." He noted that Iran waited a year after the US left the JCPOA, while remaining within the deal, before increasing its centrifuge numbers and enrichment levels.

Tehran is therefore likely to treat the terms of the collapsed Islamabad MoU as its negotiating floor, seeking to revive them rather than accept a renegotiated baseline. It is likely to resist arrangements that permanently fix enrichment limits, stockpile custody, or long-term verification before it receives concrete reciprocal commitments, including defined sanctions relief and security-related assurances, as reflected in its reported 10-point plan, four publicly stated preconditions, and Azizi's 12 September warning against returning to talks without prior US concessions.

ONN Advisory Council member Laura Rockwood suggested that Iran would likely first test what Washington is prepared to offer up front, and that two items are likely to feature along the nuclear file: a cessation of violence in Lebanon and Gaza, given how central it was to the Islamabad MoU,

and sanctions relief, which was key under the JCPOA and remains so. She added that Tehran also understands that decisions regarding the latter do not rest with one person, and that in the US durable sanctions relief ultimately involves Congress.

Iran's flexibility may be greater on implementation modalities than on the substantive limits it is prepared to accept, and growing parliamentary momentum toward NPT withdrawal compounds this posture, with 130 lawmakers petitioning on 14 September to begin the legal exit process. Kiyaei told ONN that this momentum is genuine, not purely tactical, reflecting a lack of trust in both the NPT and the IAEA's behaviour.

Kiyaei argued that the only workable formula is a bilateral US–Iran negotiation "within the framework of multilateralism," backed by the P5, with any nuclear terms tabled and enforced through a UN Security Council resolution. He linked this to low Iran–US trust. This is one expert's prescription, not a stated Iranian position, and it implies a guarantor role for the Council that differs from the current reporting, which Tehran has framed as pressure.

Israel

Israel ended the monitoring period with meaningful operational effects – degraded Iranian air defences and senior military/nuclear leadership losses, but without a clearly established route to convert them into a durable outcome fully aligned with its publicly stated objectives. Given Washington's narrowed near-term agenda and Tehran's retained bargaining leverage, Israel faces a harder political and strategic conversion problem. This is an analytic assessment, not a comparative measure of whether any actor has "won" the conflict.

Israel's inferred red line of full dismantlement of enrichment and reprocessing infrastructure, alongside a retained military option against reconstitution, creates a significant acceptance and implementation risk. However, the Lebanon framework shows Israel will accept phased sequencing for security gains (no proof it would extend to permanent dismantlement of Iran's nuclear or missile programmes), and the upcoming October 27 election may result in a change in calculus.

Gulf States

Gulf hedging is increasingly shaped by divergent tracks running alongside the Iran negotiation. Saudi Arabia is pursuing greater strategic autonomy, including a 30-year US-Saudi civil nuclear agreement signed on 22 July that opens a pathway to domestic uranium enrichment, alongside the 7 August Makkah Defence Alliance. The UAE continues engagement with Israel, including deepened wartime military and intelligence cooperation, although regional conflict and political sensitivities constrain its public profile. Meanwhile, a second maritime front has opened at Bab al-Mandeb, where Ansar Allah has seized strategic cities and islands. Preliminary Kpler data showed daily crossings fell by roughly half by 11 September, adding another Iran-aligned source of pressure on regional shipping.

Some Gulf states have sought a formal seat in the negotiations themselves, not just favourable terms, and some of their demands extend beyond nuclear limits to include dismantlement of Iran's missile and drone production capacity and an end to proxy support. Regional civil nuclear ambitions will continue to generate independent incentives for strategic hedging, proliferation-sensitive capability development, and escalation regardless of how US-Iran talks resolve.

A regional expert told ONN that the Gulf's priority is "non-nuclear": securing the Strait of Hormuz and stopping Iranian attacks. The same source argued that the US-Saudi civil nuclear agreement "undercuts the US position," presumably because it omits the requirement for Saudi Arabia to adopt the IAEA Additional Protocol (AP) — widely considered the international gold standard for enhanced inspections and verifying the absence of undeclared nuclear activities — thereby weakening Washington's case for requiring Tehran to ratify the AP.

Zone of Possible Agreement

Where Interests Converge

- 1) **Restored, credible IAEA verification** is a stated or inferred requirement for the US, Israel, and the Gulf states. However, the current trajectory, reporting to the UNSC and new sectoral sanctions, is coercive, and Iranian officials have linked this isolation to renewed calls to leave the NPT. This suggests that the shared destination is not currently matched by an effective path toward it, and further isolation could harden Iranian resistance rather than restore access. As a regional expert told ONN, "Trust between Iran and the IAEA remains low, but it can be overcome. The Iranians would like to reach an understanding on modalities, for example, to inspect bombed facilities because such protocols do not exist. The IAEA has developed some ideas for this, but the Iranians want an agreement worked out on how to proceed."
- 2) **Sequencing over immediate substance:** Both the US and Iran prefer arrangements that defer the hardest questions (enrichment ceilings, final stockpile disposition) to later phases, rather than resolving them in a single comprehensive agreement. This is a convergence of process preference, not of substantive position. The two sides still disagree sharply on where sanctions relief sits in that sequence. However, the preference for phasing is exactly the kind of overlap a phased agreement could build around.
- 3) **No coercive control of Hormuz** is now a shared red line for the Gulf states, the US, China, and implicitly the EU (via its energy exposure).

Where Interests Diverge

- 1) **Israel's substantive red lines** (zero enrichment, physical dismantlement, removal of material from Iranian territory) are structurally incompatible with Iran's floor (retained domestic enrichment, no forced stockpile surrender). This is a central obstacle not a gap to be negotiated around. ONN Advisory Council member Laura Rockwood shares this assessment, and another member argues that any deal would "need to override the Israeli position."
- 2) **Iran's negotiating authority** is less settled than its negotiating position: the succession to Mojtaba Khamenei means the institutional split between pragmatists, leadership-aligned conservatives and hardliners is not just a domestic constraint but a live uncertainty about whose commitments would bind Tehran in a final agreement. Any engagement premised on Iran's stated position should treat that position as provisional, pending clearer signals specifically from the Supreme Leader's office, not from the negotiating team alone.

Origins of This Inquiry

ONN's monitoring team flagged the Iran nuclear file for a dedicated stakeholder assessment after the conflict's main parties and regional stakeholders showed at times unclear, diverging objectives for a future nuclear arrangement.

This sharpened into a concrete Project Loop's forecasting question: "Will Iran agree by 3 November 2026 to restrict uranium enrichment for at least six months?"

The answer bears on weaponisation risk, the prospect of renewed US-Israel military action, Strait of Hormuz security and regional escalation, squarely within ONN's nuclear-risk reduction mandate.

This report maps the minimum requirements, constraints, and flexibility of the US, Iran, Israel, Gulf states, European actors, and regional facilitators to identify a zone of possible agreement and serve as the first stage of a project that will identify engagement questions for diplomatic missions and interlocutors.

Timeline of Key Events:

Date	Event	Why it matters
June 2025	US-Israeli strikes damaged Iranian nuclear and enrichment infrastructure at Natanz, Isfahan, and Fordow.	Created the continuing verification and reconstruction problem rather than resolving Iran's nuclear file.
28 February 2026	Renewed US-Israeli military campaign against Iran began.	Brought Iranian nuclear, missile, maritime, and proxy capabilities to the centre of the conflict.
10–11 June 2026	IAEA Board called for Iranian cooperation on enriched-uranium stocks and access; Hormuz security deteriorated.	Linked nuclear verification directly to maritime security, Gulf infrastructure, and energy risk.
17 June 2026	United States and Iran signed the Islamabad MoU, with Pakistan as witness and mediator.	Created a 60-day process for a final agreement while leaving enrichment, stockpiles, verification, sanctions, and enforcement unresolved.
10 July 2026	IAEA: "lost continuity of knowledge" across declared Iranian nuclear facilities, apart from Bushehr.	A serious verification gap, making it difficult to determine whether enriched material has been moved, diverted, or weaponised.
July 2026	The MoU unravelled; maritime insecurity and regional attacks resume.	A pivot from diplomacy to intransigence and a hardening of US and Iranian positions.
22 July 2026	US-Saudi civil-nuclear agreement signed.	Could open a pathway to domestic uranium enrichment, a capability historically restricted to prevent Middle East proliferation.
9-10 August 2026	Khamenei confirmed Ahmed Vahidi as IRGC commander-in-chief and Hossein Taeb as Basij chief, alongside Mohsen Rezaei as Supreme National Security Council secretary.	Consolidated entire wartime security apparatus under IRGC-aligned hardliners in one coordinated slate.
9 September 2026	IAEA reports Iran's nuclear program to the UNSC.	First UNSC reporting in 20 years. Formally escalated the safeguards dispute to the Security Council, opening the way to further Security Council consideration or action.
14 September 2026	130 Iranian lawmakers petitioned for NPT withdrawal.	Should a withdrawal bill be formally submitted by the Majlis, this would be the most severe step short of a weapons test. If followed by formal withdrawal under Article X, this would constitute a major escalation in

	Iran's safeguards and non-proliferation posture.
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Methodology and Sourcing Notes

This report draws on continuous real-time monitoring by Benjamin Ashraf of the Open Nuclear Network from 26 May to 17 September 2026. The report uses four source categories: official statements and rhetoric in English, Farsi, Arabic, and Hebrew; OSINT, including satellite imagery and geolocated social media content; wire and specialist outlet reporting; and expert input from ONN's roster and advisory council, used to stress-test assessments rather than as primary sourcing.

Claims lacking cross-category corroboration remain explicitly attributed and are not treated as independently established. Confidence is conveyed throughout using standard estimative language, applied consistently as relative judgements about outcome rather than predictions.

The Negotiating Problem

US-Israeli Interests

Despite an initial convergence around removing the “imminent” and “existential” threat of a nuclear-armed Iran, the war increasingly **produced distinct US and Israeli priorities**.^{1 2}

Washington entered the conflict with objectives beyond non-proliferation, including maritime security and protecting US bases and regional partners. Episodes in which Israel was seen to have breached US confidence, or US collapse in supporting a reportedly US-backed, Israeli-planned Kurdish insurgency plan, combined with disruption at the Strait of Hormuz, widened the gap between the allies' immediate priorities.³

For Trump, restoring maritime access became an urgent diplomatic and military objective: the emerging US-Iranian framework focused on reopening the Strait and ending reciprocal blockades while deferring substantive nuclear negotiations.

Washington nevertheless sought to convert military pressure into a negotiated, verifiable nuclear restraint arrangement, building on a maximalist case Secretary of State Marco Rubio had made even before the war began: in May 2025, he argued Iran did not need domestic enrichment for civilian power because fuel could be imported under safeguards, warning that “it only takes a few weeks to get to 20% [from 3.67%], then 60%, and then the 80% and 90% you need for a weapon.”⁴ Behind this rhetoric, the monitored US position by the time of the June 17 Islamabad MoU was

¹ The White House, “Peace Through Strength: President Trump Launches Operation Epic Fury to Crush Iranian Regime, End Nuclear Threat,” 1 March 2026.

<https://www.whitehouse.gov/releases/2026/03/peace-through-strength-president-trump-launches-operation-epic-fury-to-crush-iranian-regime-end-nuclear-threat/>

² Prime Minister's Office of Israel, “Statement by Prime Minister Netanyahu,” 28 February 2026.

<https://www.gov.il/en/pages/statement-by-prime-minister-netanyahu-28-feb-2026>

³ Firing Line with Margaret Hoover, PBS, Tamir Hayman, Full Episode. 29 May 2026.

<https://www.youtube.com/watch?v=gnRHWkeNZqA>

⁴ Reuters, “Iran Must 'Walk Away' from All Uranium Enrichment, Rubio Says,” 2 May 2025.

<https://www.reuters.com/world/iran-must-walk-away-all-uranium-enrichment-rubio-says-2025-05-02/>

reportedly a 20-year enrichment moratorium with additional unspecified restrictions, rather than immediate permanent dismantlement.⁵

The central disputes at the time of the June MoU remained: **1) duration of enrichment restrictions; 2) the fate of Iran's approximately 440kg stockpile of uranium enriched to 60%; 3) sanctions relief; and 4) restoration of IAEA verification.** Washington's proposed incentives were largely bilateral: oil waivers, unfreezing Iranian funds, and a planned reconstruction and economic-development package of at least \$300 billion involving regional partners, rather than a new UN "snapback" threat.

However, this approach did not survive the MoU's collapse, and by September the US had abandoned the MoU-era flexibility, pursuing enforcement instead. Washington has therefore increasingly supplemented stalled bilateral incentives with multilateral pressure, a hardening reflected in Energy Secretary Wright's 6 September statement that the US "may not" reach a nuclear agreement at all.⁶ ⁷ Seven days later, in a separate interview with Bloomberg, Wright floated the idea of Iran receiving nuclear fuel in exchange for zero enrichment capability — a strikingly similar proposition to the one Rubio had made sixteen months earlier.⁸

At the time of writing, an ONN Advisory Council member told ONN that for Trump an Iran deal has "dropped down his list of priorities," with the economy and midterms taking precedence. The same source assessed that he wants out of the war "one way or the other." The US posture should therefore be read less as a commitment to a harder line than as indifference to the terms on which the war ends.

Meanwhile Israel's position on an Iran nuclear deal has been substantially broader and less reversible than Washington's and has hardened as the war has progressed. Prior to the war, in the lead-up to the second round of the Geneva nuclear talks on 15 February, Netanyahu set out Israel's conditions for any US-Iran deal: 1) all enriched uranium had to leave Iranian territory; 2) Iran's enrichment "equipment and infrastructure" had to be dismantled; and 3) the inspection regime had to include real-time, no-notice access.⁹

On 19 March, Knesset Foreign Affairs and Defence Committee Chair Boaz Bismuth said the campaign sought not only to eliminate Iran's nuclear and ballistic missile capabilities but to

⁵ Barak Ravid, "U.S. Asked Iran to Freeze Uranium Enrichment for 20 Years, Sources Say," *Axios*, 13 April 2026. <https://www.axios.com/2026/04/13/iran-uranium-enrichment-moratorium-talks-vance>

⁶ Al Jazeera, "IAEA Board Resolves to Report Iran to Security Council over Nuclear Program," 9 September 2026.

<https://www.aljazeera.com/news/2026/9/9/iaea-board-resolves-to-report-iran-to-security-council-over-nuclear-program>

⁷ Maya Yang, "Energy Secretary Says US Might Not Reach Nuclear Agreement with Iran," *The Guardian*, 6 September 2026. <https://www.theguardian.com/world/2026/sep/06/us-iran-nuclear-agreement-chris-wright>

⁸ Jonathan Tirone, "Wright Warns Oil Markets against Expecting Iran-Hormuz Breakthrough," *Bloomberg*, via *WorldOil*, 13 September 2026. <https://www.worldoil.com/news/2026/9/13/wright-warns-oil-markets-against-expecting-iran-hormuz-breakthrough/>

⁹ Reuters, "Netanyahu: Deal with Iran Must Dismantle Nuclear Infrastructure, Not Just Stop Enrichment," 15 February 2026. <https://www.reuters.com/world/middle-east/netanyahu-deal-with-iran-must-dismantle-nuclear-infrastructure-not-just-stop-2026-02-15/>

weaken the regime sufficiently for Iranians to “take fate into their own hands.”¹⁰ This was consistent with Netanyahu’s own position: on 28 February, in his address announcing the joint operation, he told Iranians to “take your destiny into your own hands,” while on 17 March he said Israel was seeking to “weaken” the regime and give Iranians an “opportunity to remove it.”¹¹

As of September, this maximalism has not lessened: on 5 September, Netanyahu told i24NEWS Israel had completed “80-90% of the work” against Iran with the remainder still to finish; on 10 September, at the Western Wall, he vowed, “As long as I am prime minister, Iran will not have nuclear weapons.”^{12 13}

Israel therefore **treated indigenous enrichment, advanced centrifuges and deeply buried infrastructure as an unacceptable latent weapons capability.** Its implied requirements were: 1) zero enrichment; 2) physical dismantlement; 3) removal of enriched uranium from Iranian territory; 4) unrestricted verification including undeclared sites; and 5) a freedom to strike future violations.

Hardened Iranian Position

Iran’s position hardened as diplomacy gave way to military escalation. The killing of Ali Khamenei in the opening strikes of Operation Epic Fury and Mojtaba Khamenei’s subsequent appointment introduced an important qualification: final authority over war, peace and nuclear policy now rests with a Supreme Leader whose hardline background offers no established record on enrichment or negotiations specifically, with the exception of US intelligence reported by the New York Times on 24 July, which found the new Supreme Leader is “far more” inclined to seek the development of nuclear weapons.¹⁴

Iran’s core pre-war red line remained an enrichment capability. Before the war, Deputy Foreign Minister Majid Takht-Ravanchi warned that talks would fail if Washington demanded “zero enrichment,” Ali Khamenei called that demand “excessive and outrageous.”^{15 16} President Masoud Pezeshkian maintained that Iran “did not seek nuclear weapons” but would not relinquish enrichment for peaceful purposes.¹⁷ Tehran therefore distinguished weaponisation,

¹⁰ The Knesset. “Foreign Affairs and Defense Committee Chair MK Boaz Bismuth Gives Online Briefing to Ambassadors of EU States in Israel,” 19 March 2026. <https://main.knesset.gov.il/en/news/pressreleases/pages/press193260.aspx>

¹¹ Iran International, “Netanyahu Says Israel Weakening Iran Regime to Give People ‘Opportunity’ to Remove It,” 17 March 2026. <https://www.iranintl.com/en/202603175051>

¹² i24NEWS, cited in Iran International, “Netanyahu Says Israel Must Finish Remaining ‘Work’ on Iran,” 5 September 2026. <https://www.iranintl.com/en/202609053855>

¹³ Ynetnews, “Netanyahu: Iran Is Trying to Rebuild Its Nuclear Weapons Capability,” 10 September 2026. <https://www.ynetnews.com/article/rjwxldxkme>

¹⁴ Julian E. Barnes, “Iran’s New Leader Is More Open to Pursuing a Nuclear Weapon, U.S. Officials Say,” *The New York Times*, 24 July 2026. <https://www.nytimes.com/2026/07/24/us/politics/iran-nuclear-weapon.html>

¹⁵ Iran International, “Calling for Zero Enrichment Will Collapse Nuclear Talks, Iran’s Deputy FM Says,” 19 May 2025. <https://www.iranintl.com/en/202505190836>

¹⁶ Associated Press, “Iran’s Supreme Leader Rejects US Stance on Uranium Enrichment,” 20 May 2025. <https://apnews.com/article/bad3bcd548ea6e06872fd15287062718>

¹⁷ Susannah George, “Iranian Officials Warn Nuclear Talks in Peril Without Uranium Compromise,” *The Washington Post*, 21 May 2025. <https://www.washingtonpost.com/world/2025/05/21/iran-nuclear-talks-uranium-enrichment/>

which it officially rejected, from enrichment, which it treated as a sovereign and treaty-based right.

That distinction leaves room for negotiation. Emad Kiyaei, Director of the Middle East Treaty Organisation, told ONN that “Iran will not stop enrichment...but what it will stop is the level of enrichment.” He added: “That level *can* be negotiated. As we have seen historically, movement in negotiations becomes possible once the US shifts from zero enrichment to limited enrichment.”

By May 2026, **Iran’s positions had crystallised into four explicit red lines**, as parliament’s National Security Committee then-chair Ebrahim Azizi framed them: 1) “the right to enrich uranium;” 2) continued possession of enriched uranium; 3) authority over the Strait of Hormuz; and 4) sanctions removal.¹⁸

Iran’s enriched stockpile was as much bargaining leverage as technical material. Iran reportedly explored third-country custody according to Saudi media, including transfer to China, but Azizi himself denied any agreed transfer, insisting Iran had no intention of moving the material “to a third country, a mediator, or any other place;” the initial report relied on informal sources and should therefore be seen as low confidence.^{19 20}

Tehran’s operative position was control over the sequencing and reciprocal benefits of any dilution or transfer, not necessarily permanent possession of every kilogram. Iran also made verification conditional. It allowed inspection at Bushehr but withheld cooperation on the enriched stockpile.

Meanwhile, **debate over NPT withdrawal entered parliamentary rhetoric, extending beyond the parliamentary security establishment.** The National Security and Foreign Policy Committee (NSFPC) spokesperson Ebrahim Rezaei called continued NPT membership “meaningless,” when fellow principalist Malek Shariati introduced legislation proposing withdrawal on 28-29 March.²¹ The NSFPC has the ability to draft and table bills regarding the NPT in the Iranian Parliament, despite not having the type of policy influence of the Supreme National Security Council (SNSC). By July, a package reportedly carrying 180 parliamentary signatures incorporated conditional withdrawal.²²

Throughout August and September, momentum for questioning the NPT intensified further. NSC secretary Mohsen Rezaei argued that US attacks on Iran demonstrate that NPT membership and IAEA safeguards do not protect states from military action and asked why Iran should refrain

¹⁸ Mehr News Agency, “Iran Not to Back Down from Its Redlines: Senior Lawmaker,” Mehr News, 28 May 2026. <https://en.mehrnews.com/news/244846/Iran-not-to-back-down-from-its-redlines-Senior-lawmaker>

¹⁹ Iran International, “Iran Will Not Back Down from Nuclear, Hormuz ‘Red Lines,’ MP Says,” 27 May 2026. <https://www.iranintl.com/en/202605275199>

²⁰ Iran International, “Iran Ready to Ship Out Enriched Uranium If Sent to China – Al Hadath,” 25 May 2026.: <https://www.iranintl.com/en/202605257831>

²¹ WANA News Agency, “Iran Lawmaker: Continued Membership in NPT Is Meaningless; Time to Withdraw,” 27 March 2026. <https://wanaen.com/iran-lawmaker-continued-membership-in-npt-is-meaningless-time-to-withdraw/>

²² Fararu, “MPs Two-Urgency Proposal to Prohibit Negotiations with the United States” [in Persian], 19 July 2026. [طرح 2 فوریتی نمایندگان مجلس برای ممنوعیت مذاکره با آمریکا](#)

from pursuing nuclear weapons.²³ Although he stopped short of announcing a weapons decision, his remarks represent unusually explicit nuclear-weapons signalling by a senior Iranian security official and intensify concerns that Tehran's deterrence calculus is shifting, an assumption bolstered by the 14 September statement **from 130 Iranian lawmakers urging the Majlis leadership to initiate the legal process for withdrawal from the NPT**. Formal passage and subsequent withdrawal would constitute a major escalation in safeguards and non-proliferation terms.²⁴

Verification as a Technical Barrier

Verification deteriorated before the 2026 war and has since become a central obstacle to any renewed nuclear agreement. Iran stopped provisionally applying the Additional Protocol and modified Code 3.1 in February 2021, ending the IAEA's complementary access and early provision of design information. Its pre-war safeguards file already includes unresolved questions over undeclared material and nuclear-related activity at multiple locations; in June 2025, the Board of Governors found Iran in non-compliance and concluded that the Agency could not verify the non-diversion of material.²⁵

The June 2025 attacks created a second, more immediate verification gap, which persisted through the 2026 war. Iran did not provide post-attack reports, declarations or access for facilities containing nuclear material, including the Fuel Enrichment Plant and Pilot Fuel Enrichment Plant at Natanz, and the Uranium Conversion Facilities, Fuel Plate Fabrication Plant and Enrichment UO₂ Powder Plant at Isfahan. The IAEA noted regular vehicle activity around the Isfahan tunnel complex, but Iran declined the requested design-information examination.^{26 27}

Apart from an inspection at Bushehr on 1–3 June, **the Agency had no in-field access the other declared 21 nuclear facilities or the location outside facilities.**²⁸

²³ Mehr News Agency, "General Rezaei: IAEA Actions Push Countries Towards Withdrawal from the NPT" [in Persian], 10 September 2026. [سوق می‌دهد NPT سردار رضایی: اقدامات اژانس، کشورها را به سمت خروج از](https://www.mehrnews.com/news/1494444) | [Mehrs News Agency](https://www.mehrnews.com/news/1494444) | [خبرگزاری مهر](https://www.mehrnews.com/news/1494444) | [اخبار ایران و جهان](https://www.mehrnews.com/news/1494444)

²⁴ Tasnim News Agency, "Statement by A Group of Mps on Reconsidering Iran's NPT Membership" [in Persian], 14 September 2026. [تسنیم - «NPT» بیانیہ جمعی از نمایندگان مجلس درباره تجدیدنظر عضویت ایران در](https://www.tasnimnews.com/Persian/News/1494444)

²⁵ IAEA, "NPT Safeguards Agreement with the Islamic Republic of Iran," GOV/2025/38, resolution adopted 12 June 2025 during the Board of Governors' 1769th session. Vienna: International Atomic Energy Agency. <https://www.iaea.org/sites/default/files/25/06/gov2025-38.pdf>

²⁶ United Nations Security Council, "UN Watchdog Lost Continuity of Knowledge' on Iran Nuclear Programme, Security Council Told amid Dispute over Sanctions," 10 July 2026. <https://press.un.org/en/blog/sc16409>

²⁷ Institute for Science and International Security (ISIS), "Analysis of IAEA Iran Verification and Monitoring and NPT Safeguards Reports," Washington, DC: ISIS-Online, 9 June 2026. <https://isis-online.org/isis-reports/analysis-of-iaea-iran-verification-and-monitoring-and-npt-safeguards-reports-june-2026>

²⁸ Associated Press, "UN nuclear watchdog says it's unable to work in Iran," AP News, 4 June 2026. Available at: <https://apnews.com/article/iran-nuclear-material-enrichment-bushehr-power-plant-28da35ab9a372494337a471fb0fa6048>

On 8 June 2026, IAEA Director General Grossi called on Iran to “re-engage” with nuclear talks and stressed the need for access to Iranian facilities.²⁹ Two days later, the IAEA’s 35-member Board of Governors adopted a Quad-tabled resolution by a vote of 21 to 3, with 10 abstentions; Russia, China, and Niger opposed.³⁰ The resolution required Iran to report the locations, quantities, chemical forms and enrichment levels of its uranium stocks, account for centrifuge inventories and provide inspectors access “without delay.”³¹ Iran rejected the Board’s approach as political. Its Foreign Ministry accused the IAEA of undermining its credibility, while Iran’s mission in Vienna said safeguards “must not be instrumentalised” for political purposes.³²

The dispute intensified in September. On 1 September, the IAEA separately warned that the lack of access to key Iranian sites “must be addressed with utmost urgency,” having been unable to verify Iran’s uranium stocks since June 2025. By 7 September, Grossi told the Board of Governors it had been “more than a year since the Agency lost continuity of knowledge” over Iran’s previously declared LEU and 60%-enriched HEU inventories.³³ ³⁴ Iran responded the same day: Foreign Ministry spokesperson Esmail Baghaei dismissed the push for a new resolution, while Iran’s Permanent Mission in Vienna declared unconditional safeguards “meaningless” in the “current hazardous situation” and accused the Agency of “politically influenced reporting.”³⁵ ³⁶

Meanwhile, satellite imagery recorded repair and hardening activity at Taleghan 2, while continued construction and movement were observed at Pickaxe Mountain, an uninspected underground complex. Open-source estimates place the facility 80-100 metres below the ridge, although such estimates remain uncertain.³⁷ ³⁸ Grossi separately confirmed indications of movement around the site on 10 September, telling Bloomberg that remote imagery showed

²⁹ Al Jazeera, “UN Watchdog, Western Nations Call on Iran to Restart Nuclear Cooperation,” 8 June 2026. <https://www.aljazeera.com/news/2026/6/8/un-watchdog-western-nations-call-on-iran-to-restart-nuclear-cooperation>

³⁰ Reuters, “IAEA Board Passes Resolution Demanding Iran Report Uranium Stocks, Diplomats Say,” 10 June 2026. <https://www.reuters.com/world/europe/iaea-board-passes-resolution-demanding-iran-report-uranium-stocks-diplomats-say-2026-06-10/>

³¹ Ibid.

³² Permanent Mission of the Islamic Republic of Iran to the United Nations and International Organizations in Vienna (@PMIRAN_Vienna), Post on X, 8 June 2026. https://x.com/PMIRAN_Vienna/status/2063904497332568362

³³ IAEA, “IAEA Director General’s Introductory Statement to the Board of Governors,” 7 September 2026. Vienna: International Atomic Energy Agency.

³⁴ IAEA, “NPT Safeguards Agreement with the Islamic Republic of Iran,” GOV/2026/50, report by the Director General, 1 September 2026. Vienna: International Atomic Energy Agency.

³⁵ Tasnim News Agency, “Iran Dismisses Push to Refer Nuclear File to UNSC,” 7 September 2026. <https://www.tasnimnews.ir/en/news/2026/09/07/3690892/iran-dismisses-push-to-refer-nuclear-file-to-unscc>

³⁶ IRNA, “Iran: Calls for Unconditional IAEA Safeguards Compliance ‘Meaningless,’” 8 September 2026. [Iran: Calls for unconditional IAEA Safeguards compliance meaningless - IRNA English](https://www.iranica24.com/en/news/iran-calls-for-unconditional-iaea-safeguards-compliance-meaningless-irna-english)

³⁷ David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, “Repair and Rehabilitation Activity Identified at Taleghan 2,” Institute for Science and International Security, 10 July 2026. <https://isis-online.org/isis-reports/repair-and-rehabilitation-activity-identified-at-taleghan-2>

³⁸ Joseph Rodgers, Douglas Comstock, and Joseph S. Bermudez Jr., “New Satellite Imagery Analysis Reveals an Uptick in 2026 Construction Activity at Pickaxe Mountain,” Center for Strategic and International Studies, 9 September 2026. <https://www.csis.org/analysis/satellite-imagery-pickaxe-mountain>

“some indications that there is movement around this construction site,” while cautioning that the Agency has “no concrete information as to activities that may be taking place there.”³⁹ Imagery could document damage, repair and construction, but could not establish whether these sites contained uranium, centrifuges, conventional military infrastructure, or weapons-related work.

A separate ISIS analysis published in late August identified a previously unknown, partially underground bunkered structure at Natanz, assessed as likely intended for uranium hexafluoride storage, undamaged by either the 2025 or 2026 strikes, adding another unresolved question about nuclear-related infrastructure.⁴⁰

The verification barrier therefore combines three uncertainties: an unaccounted-for material inventory; unknown residual enrichment and centrifuge capability; and the absence of legal and practical tools needed to exclude undeclared activity.

³⁹ Lazar Berman, “IAEA Says Nuclear Watchdog Has Observed Construction at Iran’s Pickaxe Mountain,” *The Times of Israel*, 10 September 2026. https://www.timesofisrael.com/liveblog_entry/iaea-says-nuclear-watchdog-has-observed-construction-at-irans-pickaxe-mountain/

⁴⁰ David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, “Probable Uranium Storage Facility Identified at the Natanz Nuclear Complex,” Institute for Science and International Security, 25 August 2026. <https://isis-online.org/isis-reports/probable-uranium-storage-facility-identified-at-the-natanz-nuclear-complex>

Stakeholder Mapping Exercise

Stakeholder	Core interests	Objectives: From War to Settlement	Position on future nuclear agreement	Main constraints	Indicators of flexibility	Alternative position that would reduce nuclear risk (analytical proposal, not a stated position)
United States	- Prevent Iranian nuclear weaponisation. - Protect US personnel, bases, regional partners, critical infrastructure, commercial shipping, and energy flows. - Preserve secure commercial transit through the Strait of Hormuz. - Avoid an open-ended war while retaining credible deterrence and escalation-control options.	- Degrade the Iranian capabilities judged to pose an immediate nuclear, missile, and maritime threat. - Compel an end to attacks on US personnel, military facilities, partner states, critical infrastructure, and commercial shipping. - Reduce Iran's capacity to enable regional armed partners that threaten US and allied interests. - Treat political change in Iran as a possible desired effect of coercion for some US actors, not as an established and uniform US war aim. - Secure a stable exit from direct conflict without enabling rapid nuclear reconstruction.	- Likely supports a phased agreement combining: 1) A phased arrangement in which zero enrichment may be time-limited and final enrichment terms are deferred to follow-on negotiations. 2) Verified stockpile disposition or monitored custody. 3) Restoration of IAEA monitoring and continuity of knowledge. 4) Reciprocal, performance-linked defence and precision-munition stocks. 5) Regional maritime-security and de-escalation measures. 6) Defined consequences for material breach.	- Growing domestic opposition to the war and declining presidential approval. - Sustained fuel-price and inflation pressure. - Rising financial and human costs, including casualties. - Significant depletion of missile-defence and precision-munition stocks. - Risk of Israeli unilateral action and diverging US-Israeli end-state preferences. - Iranian mistrust rooted in US withdrawal from the JCPOA and the perceived failure of sanctions-relief commitments.	- Acceptance of a two-phase process separating immediate de-escalation from final nuclear negotiations. - Willingness to lift or unwind coercive maritime measures and support for restored commercial navigation. - Temporary waivers for Iranian oil-related trade and associated banking, insurance, and transport. - Reported access to frozen Iranian assets; a jointly developed reconstruction and economic-development framework. - Willingness to negotiate broader sanctions termination on an agreed schedule. - Pursuit of a settlement that does not make regime change a precondition.	- Accept a long-duration, tightly constrained Iranian enrichment programme rather than demand permanent zero enrichment, provided that: 1) Enrichment level, stockpile size and chemical form, centrifuge capacity, and sensitive fuel-cycle activities are strictly limited. 2) Higher-risk enriched material is down-blended, exported, converted, or placed in IAEA-sealed monitored custody. 3) The IAEA regains sufficient access to restore continuity of knowledge and verify a complete material account. 4) Sanctions relief is pre-agreed, reciprocal, and linked to verified implementation. 5) Any serious, verified violations would trigger a rapid process for corrective action and consequences.
Iran	- Preserve regime survival, territorial sovereignty, and decision-making autonomy. - Retain a domestic nuclear capability and the bargaining leverage associated with it. - Obtain credible sanctions relief, access to frozen assets, and economic/reconstruction benefits. - Secure assurances against renewed US–Israeli military action. - Preserve influence over the Strait of Hormuz and wider regional escalation dynamics.	- Survive US–Israeli military pressure while preserving regime command, critical strategic capabilities, and domestic political control. - Impose costs through missile, drone, maritime, and partner-enabled regional pressure. - Convert military survival into economic relief, security assurances, and recognition of a continued Iranian domestic enrichment programme. - Avoid an agreement that appears to require unilateral surrender of strategic capability, indefinite external coercion, or loss of sovereign decision-making.	- A phased, reciprocal package in which verified Iranian nuclear measures are paired with concrete economic and security benefits. - Domestic enrichment capability and resist permanent zero enrichment, unilateral stockpile surrender, or arrangements that leave strategic material under foreign control without reciprocal commitments. - Accept defined and negotiated IAEA verification, but resist open-ended, unrestricted, or military-sensitive access conditions—particularly while it perceives a continuing military threat. - Seek sanctions relief, access to frozen assets, reconstruction support, non-attack commitments, and an agreed process limiting unilateral re-imposition of coercive measures. - Treat enrichment limits, stockpile disposition, IAEA access, sequencing, and compliance procedures as linked elements of a single bargain.	- War damage, sanctions pressure, energy shortages, inflation, and broader economic stress. - Continuing risk of US or Israeli military action and uncertainty about their future force posture. - Deep distrust of US implementation following the JCPOA withdrawal and Iran's perception that earlier sanctions relief did not generate reliable economic normalisation. - Domestic political pressure against visibly unilateral, humiliating, or irreversible concessions. - Potential leadership and command uncertainty.	- Reported willingness to discuss enrichment level and purity, while insisting on the principle of domestic enrichment. - Reported willingness to down-blend higher-enriched material domestically under an agreed framework. - Engagement in phased negotiating arrangements separating immediate de-escalation from final-status nuclear terms. - Willingness to consider defined IAEA access and verification if it is linked to reciprocal sanctions relief and non-attack commitments. - Continued engagement through mediators despite opposition to US demands for zero enrichment.	- Accept a low, defined enrichment ceiling and strict limits on the amount and form of enriched material. - Down-blend higher-risk stocks under IAEA supervision, or place them in IAEA-sealed monitored domestic custody; use temporary transfer, conversion, or export only where politically acceptable. - Restore staged IAEA access sufficient to rebuild a verified material account and continuity of knowledge. - Receive pre-agreed, predictable, performance-linked sanctions relief, access to frozen assets, economic support, and credible non-attack commitments. - Use a time-bound dispute process that requires corrective action after serious, verified violations while limiting unilateral re-imposition of sanctions outside the agreed mechanism.
Israel	- Prevent Iran from acquiring a nuclear weapon or retaining a nuclear capability that Israel judges readily reversible, weakly monitored, or capable of rapid weaponisation. - Degrade and constrain Iranian ballistic-missile, drone, proxy, and regional military capabilities that threaten Israel. - Preserve deterrence, regional military advantage, and a credible option to act against an imminent or material nuclear threat.	- Degrade Iranian nuclear-related, missile, drone, command, and partner-enabled capabilities that threaten Israel. - Convert battlefield effects into durable constraints that prevent Iran from reconstructing, dispersing, hardening, concealing,	- Likely reject a short-term or JCPOA-style arrangement that leaves Iran with a readily reversible or weakly monitored path to weapons-relevant capability. - Seek verified disposition of higher-risk stocks, strict limits on enrichment capacity and advanced centrifuges, enhanced IAEA	- Coalition politics and domestic expectations that military operations deliver durable security gains. - The difficulty of proving that battlefield damage has permanently removed, rather than	- Limited direct evidence indicates Israel would accept an Iranian enrichment programme. - Israel's public maximal demands do not establish that it lacks a fall-back position if US–Iran diplomacy delivers early, visible, independently verified, and difficult-to-reverse constraints.	- Accept a long-duration agreement that permits only low, tightly capped, and continuously monitored Iranian enrichment rather than require immediate total dismantlement. - Require verified down-blending, export, conversion, or IAEA-sealed custody of higher-risk enriched material; strict limits on centrifuge deployment, advanced-machine R&D, and sensitive fuel-cycle activity; and enhanced IAEA

Stakeholder	Core interests	Objectives: From War to Settlement	Position on future nuclear agreement	Main constraints	Indicators of flexibility	Alternative position that would reduce nuclear risk (analytical proposal, not a stated position)
	- Reduce Hezbollah's capacity to threaten Israel and weaken Iran's wider network of armed partners.	- or rapidly reconstituting nuclear and missile capabilities. - Secure implementation of Lebanon-related security arrangements and retain a credible option to respond if Iran poses an imminent nuclear threat or seriously violates a settlement.	- verification, and credible access arrangements for suspect or undeclared sites. - Oppose sanctions relief ahead of independently verified, difficult-to-reverse Iranian steps and seek defined consequences for serious violations. - Retain a credible option to act if Iran poses an imminent threat or if agreed compliance mechanisms fail to resolve a serious breach.	- delayed, Iranian nuclear and missile capacity. - Pressure from Washington and other partners to accept a limited or phased agreement to prevent wider escalation. - International, regional, and domestic political costs associated with prolonged regional military operations, Gaza, and Lebanon. - The risk that a negotiated agreement constrains Israeli action while leaving Iran with residual or reconstituted capability. - The operational burden of sustaining prolonged military pressure and defending against missile, drone, and proxy threats.	- The Israel–Lebanon framework shows Israeli tolerance for conditions-based sequencing where security gains are tangible and independently verified; it is not direct evidence of acceptance of phased Iranian nuclear constraints.	- access sufficient to restore continuity of knowledge. - Link sanctions relief to independently verified, difficult-to-reverse Iranian steps rather than promises or declarations. - Establish a time-bound process for resolving verification disputes and serious non-compliance, with defined economic, diplomatic, and other agreed consequences. - Reserve military action for an imminent threat or serious, verified breach that cannot be resolved through the agreed compliance process.
Gulf states	- Protect territory, populations, energy facilities, desalination plants, ports, airports, trade routes, and domestic political stability. - Preserve reliable and non-coercively restricted commercial navigation through the Strait of Hormuz. - Maintain US security relationships while diversifying defence, diplomatic, and economic partnerships. - Reduce vulnerability to Iranian retaliation, disruption of regional energy flows, and uncertainty over the scope and reliability of external security guarantees. - Retain national civil-nuclear and broader strategic options without triggering destabilising regional competition.	- Limit direct involvement in conflict, prevent spillover, and protect critical infrastructure, exports, and commercial traffic. - Restore secure, predictable, and commercially viable navigation through Hormuz without accepting Iranian coercive control over access. - Strengthen integrated air and missile defence, infrastructure resilience, maritime security, crisis communications, and national deterrence. - Secure meaningful consultation in any US–Iran arrangement affecting Gulf security, maritime access, military posture, or regional escalation risks. - Diversify security relationships and reduce reliance on a single external security provider, while recognising continued dependence on US capabilities.	- Gulf governments are likely to support a nuclear agreement that includes credible limits on Iranian weapons-relevant activity, verified stockpile controls, meaningful IAEA access, and reliable protection against renewed attacks on Gulf territory and infrastructure. - Many will prefer a broader package linking nuclear restraint to maritime security, missile and drone risk reduction, constraints on regional armed groups, non-attack commitments, and mechanisms for Gulf consultation. - Gulf states differ over whether Iran may retain domestic enrichment. Saudi Arabia, the UAE, Qatar, Oman, Bahrain, and Kuwait should not be treated as a single negotiating bloc. - Gulf support for any agreement will depend on whether it reduces actual risks to infrastructure and shipping rather than merely pauses US–Iran hostilities.	- Continued reliance on US air and missile defence, intelligence, logistics, maritime protection, and extended deterrence despite efforts to diversify partnerships. - Internal GCC differences in threat perception, political priorities, relations with Tehran, and acceptable levels of Iranian enrichment. - Acute exposure of oil, gas, power, water-desalination, port, aviation, and financial infrastructure to missile, drone, cyber, maritime, and sabotage threats. - Economic exposure to disrupted Hormuz traffic, higher insurance and shipping costs, production outages, and energy-market volatility. - Limited ability to enforce collective Gulf red lines without external support. - Divergent national civil-nuclear trajectories: Saudi Arabia's 2026 agreement with the United States vs. UAE's 2009 agreement.	- Gulf support for mediation, technical arrangements, de-escalation channels, and phased implementation where these visibly improve maritime security and infrastructure protection. - Oman and Qatar may be more open than some GCC states to a tightly monitored Iranian enrichment arrangement if it is tied to credible verification, non-attack commitments, and secure commercial navigation. - Growing interest in practical resilience measures—alternative pipelines, ports, storage, air defence, maritime coordination, and incident-management mechanisms—rather than reliance on maximal political demands alone. Gulf investment in pipelines and ports has increased in response to the conflict's disruption of Hormuz-linked trade. - Openness to a Gulf-inclusive diplomatic framework if it gives regional governments an operational consultation role rather than treating them as passive recipients of US–Iran decisions.	- Endorse a Gulf-inclusive regional-security package that permits only low, tightly capped, and continuously monitored Iranian enrichment. - Require verified disposition or monitored custody of higher-risk Iranian enriched stocks; restoration of IAEA access and continuity of knowledge; and a time-bound mechanism for addressing serious, verified violations. - Pair nuclear restraint with missile and drone risk-reduction measures, non-attack commitments covering energy, water, port, aviation, and civilian infrastructure, and secure commercial-navigation arrangements in Hormuz. - Establish standing Gulf consultation, information-sharing, incident-prevention, and crisis-communication mechanisms linked to the agreement's verification and compliance process. - Support pre-agreed, performance-linked sanctions relief and reconstruction/economic incentives only where Iranian nuclear and regional-security commitments are independently verified.
European Union / E3	- Prevent Iranian nuclear weaponisation and preserve the NPT, IAEA safeguards system, and wider rules-based non-proliferation order. - Prevent wider regional escalation and limit associated energy, trade, migration, humanitarian, and security consequences for Europe. - Restore credible IAEA verification, including continuity of knowledge over Iranian nuclear material and enrichment capacity. - Retain European diplomatic relevance and preserve the ability to use sanctions relief, technical assistance, trade facilitation, and reconstruction support as leverage.	- Support nuclear and missile restraint while avoiding wider conflict. - Restore IAEA verification and convert formal sanctions authority into practical leverage over implementation. - Re-enter a settlement process through sanctions sequencing, technical verification, humanitarian support, and economic stabilisation.	- Likely support an updated, verification-centred JCPOA-type arrangement: enrichment and stockpile limits, restored IAEA monitoring and continuity of knowledge, credible access procedures, phased sanctions relief, and defined consequences for serious violations. - Support maritime-security and regional de-escalation measures where they reinforce rather than replace nuclear safeguards. - Oppose relief without verified nuclear steps or an arrangement that	- Limited influence over the principal US–Iran negotiating channel. - Iranian efforts to marginalise the E3. - EU member-state differences, and separation between the EU institutional role and the UK's E3 role. - Limited ability to deliver economic normalisation under continuing US secondary	- Continued preference for diplomacy, IAEA verification, and updated rather than unchanged JCPOA mechanisms. - Readiness to support sanctions relief for verified Iranian nuclear steps. - Ability to combine EU sanctions relief with humanitarian, trade, technical, and reconstruction tools. - Support for de-escalation and safe Hormuz transit alongside rigorous nuclear verification.	- Offer phased European sanctions relief, trade facilitation, technical support, and reconstruction assistance for independently verified nuclear steps. - Condition major benefits on restored IAEA access, material accountability, continuity of knowledge, and resolution of safeguards issues. - Support a low capped enrichment arrangement with stockpile controls, capacity limits, and credible access procedures. - Act as a technical guarantor of sequencing, compliance review, and economic delivery, while

Stakeholder	Core interests	Objectives: From War to Settlement	Position on future nuclear agreement	Main constraints	Indicators of flexibility	Alternative position that would reduce nuclear risk (analytical proposal, not a stated position)
			leaves Iran with a rapidly reversible weapons-relevant pathway.	sanctions and private-sector de-risking. - Exposure to energy, shipping, migration, evacuation, and humanitarian effects of prolonged regional instability.		supporting maritime-security and regional de-escalation arrangements.
Pakistan	- Prevent wider escalation; preserve relations with Iran, Saudi Arabia, Gulf states, Turkey, and the United States; manage border, refugee, sectarian, and economic spillover; and sustain diplomatic relevance. - Balance its mediation role with security expectations created by the Saudi defence partnership.	- Remain formally outside the conflict, facilitate dialogue, sustain ceasefire arrangements, and limit Iranian–Gulf escalation. - Convert mediation into durable diplomatic influence without becoming responsible for enforcing a nuclear agreement. - Reduce Iran-border, refugee, sectarian, and Saudi-security risks.	- No detailed public Pakistani position on substantive nuclear terms is established. - Likely support a phased US–Iran arrangement that preserves de-escalation, includes reciprocal implementation, and reduces threats to Saudi Arabia, Gulf infrastructure, and Pakistan’s border security. - Pakistan’s role is likely procedural, mediation, communication, sequencing, and political support, rather than technical nuclear verification or enforcement.	- Saudi defence commitments versus continued engagement with Tehran. - Unresolved extended-deterrence perceptions associated with Pakistan’s nuclear status; no public nuclear guarantee is established. - Afghan-border insecurity, Iranian-border pressures, sectarian sensitivity, and economic constraints. - More than 34,000 recorded crossings from Iran into Pakistan via Taftan between 1 March and 16 July 2026.	- Demonstrated mediation between Washington and Tehran, including facilitation of the June interim agreement. - Sustained channels to both sides and preference for incremental, reciprocal, face-saving diplomacy. - Potential to support regional consultation and political implementation arrangements but not replace IAEA verification.	- Facilitate a sequenced arrangement: non-attack and maritime measures first; restoration of IAEA access next; then stockpile disposition and enrichment limits linked to verified, reciprocal economic relief. - Act as a political facilitator and witness to milestones, alongside other acceptable regional states; leave nuclear verification to the IAEA. - Support complementary regional measures on infrastructure security, maritime communication, humanitarian coordination, and border management.
China	- Preserve access to discounted Iranian crude oil. - Defend China’s legal-multilateral framing of non-proliferation, specifically its position that UNSC Resolution 2231 and the JCPOA-linked “snapback” mechanism expired in October 2025. - Protect Security Council authority and multilateral process against what Beijing frames as unilateral US-Israeli military action lacking authorisation. - Maintain parallel relationships with Gulf Arab states without being drawn into the conflict as a belligerent or a guarantor.	- Prevent further disruption to Hormuz-linked energy flows and regional stability that threaten Chinese trade and investments. - Block re-imposition of UN sanctions on procedural and legal grounds rather than defend Iran’s nuclear program. - Preserve a diplomatic, non-aligned mediator posture.	Affirms Iran’s “legitimate right” to peaceful nuclear energy and to note Iran’s repeated commitment to NPT and not to develop nuclear weapons, implicitly opposing zero-enrichment. Rejects the legal validity of the 2025 snapback UN sanctions and maintains that Resolution 2231 terminated in October 2025. Support a bilateral, negotiated US–Iran settlement through IAEA safeguards.	Chinese crude oil imports from Iran have fallen approx. 50% since war began. Must balance Iran relationship against Arab Gulf states. No formal alliance or military commitment to Iran. Risk of being cast internationally as enabling Iranian sanctions evasion or weapons-relevant procurement.	Substantive engagement in UNSC sessions and use of formal diplomatic channels rather than disengagement. Explicit, repeated endorsement of a negotiated settlement, signalling openness to a verification-based framework. Continued status as a JCPOA original signatory gives China institutional standing to re-engage a revived multilateral framework if political conditions allow.	Use of outsized economic leverage as a conditional incentive rather than purely legal shield: link discounted crude purchases and barter-trade access to Iranian cooperation. Jointly propose with Russia a technical P5-plus-Iran verification dialogue that operates independently of contested “snapback expired” dispute, allow China to support verification measures. Offer to co-guarantee a low, capped, continuously monitored enrichment arrangement alongside other partners.
Jordan	- Avoid becoming a battlefield; protect sovereignty, population, airspace, infrastructure, and economic stability. - Preserve essential US security support while reducing exposure to retaliation and domestic political costs. - Limit missile, drone, militia, refugee, and economic spillover from regional escalation.	- Remain formally non-belligerent while defending Jordanian airspace and territory. - Reduce retaliatory risks associated with US facilities and regional military operations. - Support a settlement that reduces regional escalation even if Jordan does not shape detailed nuclear terms.	- No detailed Jordanian position on enrichment, stockpiles, centrifuge capacity, or IAEA verification is established. - Likely support an agreement that reduces missile, drone, proxy, and retaliation risks to Jordanian territory, airspace, infrastructure, and US facilities. - Favour non-attack commitments, airspace deconfliction, escalation-management mechanisms, and credible verification.	- Dependence on US security assistance and military cooperation. - Direct exposure to Iranian missile and drone attacks against US facilities in Jordan. - Domestic political sensitivity over foreign military presence and perceived involvement in regional war. - Limited influence over US–Iran diplomacy and the final technical terms of a nuclear agreement.	- Public emphasis on neutrality, sovereignty, and defensive airspace protection. - Continued US security cooperation despite political and escalation risks. - Incentive to support airspace coordination, early warning, missile/drone incident prevention, and non-attack commitments. - Openness to arrangements that clarify defensive mission parameters and reduce Jordanian exposure.	- Support a regional non-attack and escalation-management arrangement alongside the nuclear agreement. - Include airspace deconfliction, early-warning, incident-management, and protection measures for civilian and critical infrastructure. - Seek clearer consultation and defensive parameters around foreign military facilities, while preserving US security cooperation. - Support strong nuclear verification and dispute-resolution mechanisms to reduce the chance of renewed military conflict.

External Diplomatic Channels

Considering opportunities for diplomatic engagement, ONN has focused on four actors with relevance to nuclear-risk reduction: Pakistan, the European Union, Jordan, and China. These do not form a single diplomatic bloc; each offers a different type of relevance: Pakistan retains mediation access; Jordan exposes the limits of US regional military posture (also visible via the UAE); the EU's formal sanctions authority has not translated into leverage or centrality during the war, and China's economic relationship with Iran gives it considerably greater leverage in multilateral channels of engagement.

Pakistan

Pakistan remains the clearest active diplomatic channel on the nuclear file, though its mediation access is qualified by its Saudi security obligations. From 23 March, Pakistan's Foreign Office formally offered Islamabad as a venue for US-Iran talks and subsequently mediated both the 8 April ceasefire and the 17 June Islamabad MoU. Tehran and Washington have both used this channel even while fighting continued elsewhere, and Pakistan has leveraged the opening to position itself as a security guarantor, particularly for Gulf states.

That positioning sits uneasily alongside Pakistan's defence pact with Saudi Arabia: when Foreign Minister Ishaq Dar invoked the pact on 3 March as a warning against Iranian strikes on Saudi territory, Saudi commentary read its Article-5-style language as placing the Kingdom under Pakistan's nuclear umbrella, a framing Islamabad has neither confirmed nor denied.⁴¹

Pakistan's mediation role is constrained by independent security commitments and regional interests. It can carry messages and host negotiations, but its role is limited by: (1) its separate mutual-defence relationship with Saudi Arabia; (2) its function as a conduit for US messaging to Tehran, though independent corroboration of specific message content is still needed; and (3) domestic unrest among Pakistan's Shia population, which has required curfews and caused deaths near the US consulate.

Its value lies in the access it retains, but this does not translate into unlimited diplomatic bandwidth or Iranian trust. With the Islamabad MoU now effectively expired, Pakistan's facilitation role has so far produced sequencing agreements rather than substantive resolution.

European Union

Conversely, the E3 and the European Union have largely been absent from the process that produced the 8 April ceasefire and the 17 June Islamabad MoU, despite their formal JCPOA role and involvement in the wider UN sanctions architecture. This marginalisation has been reinforced when, on 10 June, it was the **Quad-tabled resolution at the IAEA board, not an independent European initiative** that put the nuclear dispute back on the agenda.⁴² Iranian Foreign Minister Abbas Araghchi's description of European powers as "paralysed and irrelevant"

⁴¹ Arab News, Pakistan Reminded Iran of Saudi Defense Pact While Seeking to Limit Gulf Tensions, 3 March 2026. <https://www.arabnews.com/node/2635098/pakistan>

⁴² UK Government/FCDO, "NPT Safeguards Agreement with Iran: Quad Statement to the IAEA Board of Governors, June 2026. GOV.UK, 10 June 2026. <https://www.gov.uk/government/speeches/npt-safeguards-agreement-with-iran-quad-statement-to-the-iaea-board-of-governors-june-2026>

two weeks before the war on February 14 also reflects this.⁴³ The EU still matters for implementing sanctions relief, reconstruction, and verification, but it has not been able to negotiate a breakthrough. Therefore, any ONN engagement process should treat this limitation as a starting condition.

Jordan

Finally, Jordan is not a mediator on the nuclear file, but its exposure tests the limits of an open-ended US regional military posture. Iranian strikes on Muwaffaq Salti Air Base in Azraq killed three US service members, while reported transfers of additional US personnel from Gulf states deepened Jordan's exposure as a target.⁴⁴ More than 130 Jordanian political, academic, and tribal figures subsequently called for foreign forces to leave and for the US security agreement to be curtailed, arguing "Jordan is not a party to this war."⁴⁵

This does not give Jordan a role in shaping enrichment or verification terms, but it raises the risk that renewed attacks on US bases will disrupt any nuclear diplomacy in progress, the same dynamic that disrupted the Islamabad MoU's implementation window. A Jordan under sustained domestic pressure to curtail US access also narrows Washington's regional operating depth, which could push US calculus toward a faster settlement.

China

China occupies a distinct position from Pakistan, the EU and Jordan: it possesses substantially greater economic leverage over Iran and has used its relationship with Tehran to encourage de-escalation, while generally resisting ownership of the mediation process. Beijing has instead preferred parallel-track diplomacy, supporting Pakistan's mediation and diplomacy through SCO and BRICS rather than facilitating negotiations itself.

China's public position tracks back to its consistent post-2018 argument that US withdrawal from the JCPOA was the root cause of the Iranian nuclear crisis and that unilateral sanctions imposed outside a UNSC mandate lack legitimacy.⁴⁶ Beijing maintained this position through the 2025 snapback dispute and reiterated it on 17 September 2026, when China joined Russia in vetoing a

⁴³ Virginia Pietromarchi, "Iran's Araghchi Slams European Powers for 'Irrelevance' in Nuclear Talks," *Al Jazeera*, 15 February 2026. <https://www.aljazeera.com/news/2026/2/15/irans-araghchi-slams-european-powers-for-irrelevance-in-nuclear-talks>

⁴⁴ Taylor Luck, "Under Iranian Fire, Jordan Faces a Balancing Act... and Messaging Challenge," *Christian Science Monitor*, 21 July 2026. <https://www.csmonitor.com/World/Middle-East/2026/0721/jordanian-bases-iranian-missiles-american-troops>

⁴⁵ Taghrib News Agency, "Jordanian Figures Call for Cancellation of Military Agreement with U.S.," Taghrib News, 22 July 2026. Available at: <https://www.taghribnews.com/en/news/731230/jordanian-figures-c-all-for-cancellation-of-military-agreement-with-u-s>

⁴⁶ Ministry of Foreign Affairs of the People's Republic of China, "Foreign Ministry Spokesperson Hua Chunying's Regular Press Conference on September 2, 2020." https://www.fmprc.gov.cn/eng/xw/fyrbt/lxjzh/202405/t20240530_11346873.html

US-drafted resolution to extend the UN panel monitoring Iran sanctions.^{47 48} China has linked the broader crisis not only to JCPOA withdrawal but also US “maximum pressure” and subsequent US-Israeli military action.

This framing was reinforced diplomatically and multilaterally at the SCO’s Bishkek Summit on 1 September, where member states both condemned military strikes on Iran and reiterated NPT parties’ “inalienable” right to peaceful nuclear activity.⁴⁹ Xi Jinping’s four-point Middle East proposal, first presented on 14 April and revisited at the BRICS summit in September, called for peaceful coexistence, respect for national sovereignty, adherence to the international rule of law, and a balanced approach to development and security.^{50 51}

Alongside China’s diplomatic posture, reported Chinese-origin military material and commercial links have become increasingly consequential, although the available evidence does not always establish Chinese government involvement. Reuters reported on 29 July that three sources familiar with the matter said that a Hong Kong-registered intermediary, Zhongqing Baoshang International Investment, had arranged a \$60-70 million agreement to supply Iran with 300-400 Chinese-made QW-12 and FN-16 shoulder-fired air-defence missiles, reportedly to be flown from Urumqi to Pakistan, but Reuters did not know whether the Pakistan-to-Iran leg would be by air or road.⁵² Beijing and Islamabad denied the report.

More consequentially, the Wall Street Journal reported on 11 September that US officials had linked high-resolution satellite imagery supplied to Iran by Chinese entities to Iran’s 17 July missile strike on Muwaffaq Salti Air Base in Jordan, which killed three US troops.⁵³ Officials did not identify the entities or allege direct Chinese government involvement. Chinese officials disputed the allegation and demanded evidence.

Economically, China remains Iran’s principal oil customer. Kpler data cited by Reuters indicate that China bought more than 80% of Iran’s shipped oil in 2025, averaging around 1.4 million

⁴⁷ United Nations Security Council (2025), “Annex to the Letter Dated 19 August 2025 from the Permanent Representative of China to the United Nations Addressed to the President of the Security Council: Explanatory Note by the People’s Republic of China on the Relevant Issues about Security Council Resolution 2231 (2015),” S/2025/520. [UN Digital Library – S/2025/520](https://www.un.org/press/en/2025/sc-res2231.shtml)

⁴⁸ United Nations, “Security Council Fails to Renew Iran Sanctions Panel Amid Dispute over ‘Snapback,’” *Meetings Coverage and Press Releases*, SC/16455, 17 September 2026. [Security Council Fails to Renew Iran Sanctions Panel amid Dispute over ‘Snapback’ | UN Meetings Coverage and Press Releases](https://www.un.org/press/en/2026/sc-meetings16455.shtml)

⁴⁹ Shanghai Cooperation Organisation, “Bishkek Declaration of the 25th Anniversary of the Shanghai Cooperation Organisation,” 1 September 2026. [SCO Secretariat – Bishkek Declaration](https://www.sco.int/media/declaration)

⁵⁰ Ministry of Foreign Affairs of the People’s Republic of China, “President Xi Jinping Meets with Sheikh Khaled bin Mohamed bin Zayed Al Nahyan, Crown Prince of Abu Dhabi, the UAE,” 14 April 2026. https://www.fmprc.gov.cn/eng/xw/zyxw/202604/t20260414_11891573.html

⁵¹ Xi Jinping, (2026) “Jointly shouldering the responsibility of the times and striving to be a pioneering force,” *Ministry of Foreign Affairs of the People’s Republic of China*, 12 September 2026. https://www.fmprc.gov.cn/mfa_eng/xw/zyxw/202609/t20260913_12021267.html

⁵² John Irish and Jonathan Saul, “Iran to Get Chinese Shoulder-Launched Missile Systems in Weeks, Sources Say,” *Reuters*, 29 July 2026. <https://www.reuters.com/world/china/iran-get-chinese-shoulder-launched-missile-systems-weeks-sources-say-2026-07-29/>

⁵³ Vera Bergengruen, Shelby Holliday, and Anika Aurora Seth, “U.S. Links Chinese Satellite Imagery to Iranian Strike that Killed Three Troops,” *The Wall Street Journal*, 11 September 2026. <https://www.wsj.com/world/u-s-links-chinese-satellite-imagery-to-iranian-strike-that-killed-three-troops-ca0b4be3>

barrels per day.⁵⁴ Shipments have since fallen sharply: Kpler estimates Chinese imports at approximately 534,000 barrels per day so far in August.⁵⁵

Beijing has reportedly tried to translate its economic leverage into direct pressure, but this remains uncertain. IranWire reported on 2 September, citing remarks by Hossein Marashi, secretary-general of the Executives of Construction Party and a former Vice President and MP, claiming that Beijing had four demands for Tehran: reopening the Strait of Hormuz, ending transit-toll collection, resolving disputes with Saudi Arabia, and settling the conflict with the US.⁵⁶ Marashi did not identify the source or Chinese entity that conveyed the message. This should be treated as low confidence as neither government confirmed the account and no official document has surfaced.

Taken together, the evidence suggests Beijing seeks influence over the conflict without being drawn in through mediation or as a belligerent actor. China's economic relationship with Iran gives it considerably greater leverage, but it has left direct facilitation to Pakistan while pursuing its own engagement through bilateral and multilateral channels.

Consequence Analysis: What Happens If Another Deal Is Signed?

- **Political durability:** Israel's current stated and inferred red lines create a significant acceptance and implementation risk for any agreement that preserves Iranian enrichment. The June precedent, an Israeli strike on Beirut roughly two hours before the MoU's signing, establishes Israeli military activity near a signing date as an indicator worth tracking. A narrow deal would be particularly vulnerable if its implementation required Israeli acquiescence.
- **Security and escalation:** A narrow deal is likely to produce a genuine but short-lived reduction in strike tempo, consistent with the roughly three-week window between the June signing and the resumption of large-scale strikes. One plausible failure pathway is an accumulation of lower-visibility incidents, tanker attacks in the Strait of Hormuz, Gulf infrastructure strikes, and Lebanon-linked friction that erode US-Iranian tolerance. Iran's suspension of talks on 1 June and 19 June, both linked to Israeli actions in Lebanon and Gaza rather than the nuclear file itself, shows that the deal's survival would depend on triggers and factors outside its own text.⁵⁷
- **Regional alliance structure:** Gulf states will continue hedging behaviour (Saudi civil-nuclear ambitions, UAE-Israel security integration, Makkah Defence Alliance) regardless of whether a narrow deal is signed, since Gulf red lines extend beyond the nuclear file to missile/drone risk and navigation routes, neither of which a deal will fully resolve.
- **Nuclear risk specifically:** Restoration of sufficient IAEA access remains difficult under a narrow deal. The critical indicator is whether any new framework includes dated,

⁵⁴ Reuters, "China's Heavy Reliance on Iranian Oil Imports," *Reuters*, 21 March 2026. <https://www.reuters.com/business/energy/chinas-heavy-reliance-iranian-oil-imports-2026-03-21/>

⁵⁵ Reuters, "Iranian Oil Offers to China Fall as US Blockade Squeezes Exports," *Iran International*, 21 August 2026. <https://www.iranintl.com/en/202608210761>

⁵⁶ IranWire, "China Sets Conditions for Tehran over Hormuz Crisis and US Conflict," *IranWire*, 2 September 2026. <https://iranwire.com/en/news/157067-china-sets-conditions-for-tehran-over-hormuz-crisis-and-us-conflict/>

⁵⁷ Institute for the Study of War, "Iran Update Special Report, June 19, 2026," *ISW*, 19 June 2026. <https://understandingwar.org/research/middle-east/iran-update-special-report-june-19-2026/>

enforceable access commitments with defined consequences. Absent such mechanisms, a narrow deal is likely to leave Iran's stockpile and centrifuge inventory unresolved indefinitely, sustaining, not reducing the verification gap.