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**28/06/2026**

**Part -2**

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

### **III – The Strait of Hormuz, Global Power Politics and the Limits of Diplomacy**

While public attention has largely focused on the reported negotiations between Washington and Tehran and the continuing military developments in Lebanon and Gaza, another strategic theatre may ultimately prove even more consequential: the Strait of Hormuz.

For decades, this narrow maritime passage has occupied a unique position in international geopolitics. A significant share of the world's seaborne oil trade passes through the Strait, making its security a matter of concern not only for the Gulf states but also for the global economy. Even limited disruption to commercial shipping has historically generated uncertainty in energy markets, increased insurance costs, and affected economic confidence far beyond the Middle East. But we should not forget that prior to attack on Iranian by US and Israel, the strait of Hormuz was opened to all ships.

For this reason, freedom of navigation through the Strait of Hormuz has become a strategic priority for virtually every major economic power. Whether viewed from Washington, Beijing, Brussels, Tokyo or New Delhi, uninterrupted maritime commerce is regarded as an essential component of global economic stability.

*It is also important to consider the sequence of events. Prior to the military attacks on Iran by the United States and Israel, commercial navigation through the Strait of Hormuz remained open. The risk of disruption emerged only after*

*those attacks and the subsequent escalation of hostilities. From this perspective, the threat to one of the world's most important maritime corridors was a consequence of military escalation rather than its cause. Had Iran not been attacked, there would have been no immediate crisis affecting freedom of navigation through the Strait of Hormuz.*

If reports concerning a Memorandum of Understanding are accurate, one of its most immediate practical objectives may be to reduce the risk of military escalation that could threaten commercial shipping. Such an outcome would serve the interests of multiple actors, even those who remain strategic competitors in other areas.

*This illustrates an important characteristic of international diplomacy.*

States frequently cooperate on limited objectives without resolving their broader political disagreements. Preventing disruption to international trade, reducing the risk of accidental military confrontation, and stabilising energy markets are objectives that may be shared by rivals whose long-term strategic competition continues unabated.

Consequently, even if an agreement succeeds in lowering immediate tensions, it should not automatically be interpreted as signalling the emergence of a new strategic partnership between the United States and Iran.

The deeper structural differences would remain.

Questions surrounding Iran's nuclear programme, sanctions, regional influence, missile capabilities, and security relationships would continue to shape bilateral relations. Likewise, American alliances in the region and Washington's long-standing security commitments would remain central components of United States foreign policy.

In this sense, any Memorandum of Understanding should be understood as a mechanism for reducing risk rather than eliminating rivalry.

*Domestic political considerations further complicate this picture.*

In the United States, foreign policy decisions are rarely determined by international considerations alone. Congress, the executive branch, defence institutions, public opinion, electoral cycles and economic conditions all influence policy choices. As presidential and congressional elections approach, administrations often face competing pressures between demonstrating strategic resolve abroad and avoiding costly military entanglements.

These domestic realities may encourage policymakers to seek diplomatic solutions where possible while preserving sufficient strategic flexibility to respond should circumstances deteriorate.

***Iran faces its own domestic considerations.***

Economic pressures, inflation, sanctions, demographic change and public expectations all shape Tehran's policy calculations. Although Iranian leaders consistently emphasise strategic independence, they must also weigh the economic consequences of prolonged confrontation against the potential benefits of limited diplomatic engagement.

Neither government therefore negotiates from a position of complete freedom. Both operate within political systems that impose constraints upon diplomatic choices.

***The regional dimension is equally complex.***

The interests of the Gulf states, Turkey, Egypt, Iraq and other regional actors do not always align perfectly with those of either Washington or Tehran. Each government evaluates diplomatic developments through the prism of its own security concerns, economic priorities and regional ambitions.

Consequently, the future of any agreement cannot be assessed solely through the bilateral relationship between the United States and Iran. It must also be understood within a broader regional framework in which multiple states possess the capacity to influence outcomes.

***At the same time, global power politics are undergoing significant transformation.***

The international system is becoming increasingly multipolar. China has expanded its economic and diplomatic presence throughout the Middle East. Russia continues to pursue strategic interests in the region. Emerging powers seek greater influence in shaping regional institutions and economic partnerships. This evolving distribution of power provides regional governments with greater diplomatic flexibility than was available during earlier decades.

Against this backdrop, Middle Eastern states increasingly engage with multiple global powers simultaneously rather than relying exclusively upon a single strategic partner.

This changing international environment has important implications for American diplomacy.

The United States continues to possess unmatched military capabilities and extensive alliances, yet it now operates within a more competitive international system than existed at the end of the Cold War. Diplomatic initiatives must therefore account not only for regional dynamics but also for broader geopolitical competition involving other major powers.

For this reason, many observers view the current diplomatic efforts as part of a wider process of strategic adaptation rather than an isolated episode. Governments increasingly seek to manage competition through selective cooperation while maintaining their broader strategic interests.

Whether this approach succeeds will depend upon developments extending well beyond the negotiating table.

Military incidents, domestic political change, economic pressures, regional crises and shifts in the international balance of power all retain the capacity to alter strategic calculations with little warning.

The reported Memorandum of Understanding may therefore represent an important diplomatic milestone. Equally, it may prove to be only one chapter in a much longer process of regional adjustment whose ultimate destination remains uncertain.

In the concluding part of this series, we examine the possible future scenarios arising from these developments, assess whether a durable regional security framework is achievable, and consider the implications for the evolving balance of power in the Middle East and the wider international order.

#### ***IV – Between Diplomacy and Confrontation: What Lies Ahead?***

The reported Memorandum of Understanding between the United States and Iran, should it eventually be concluded, would undoubtedly represent an important diplomatic development. Yet its true significance will not be determined on the day it is signed but by what follows in the weeks, months and years thereafter.

History demonstrates that agreements between long-standing adversaries are rarely self-executing. Their durability depends less upon the language of diplomatic documents than upon the political will of the parties involved and the broader regional environment in which they operate.

Throughout this analysis, one central argument has emerged repeatedly: the Middle East cannot be understood through bilateral relationships alone.

The strategic rivalry between Washington and Tehran intersects with the Israeli-Palestinian conflict, the humanitarian catastrophe in Gaza, instability in Lebanon, the security concerns surrounding Hezbollah, the conflict in Yemen, developments in Syria, the security calculations of the Gulf States, and the interests of major global powers. None of these issues exists in isolation. Each influences the others, creating a regional security architecture of exceptional complexity.

Consequently, even the most carefully negotiated Memorandum of Understanding can only succeed if it is accompanied by a broader process of regional de-escalation.

One of the principal lessons of recent decades is that military superiority alone has not produced lasting political stability.

The United States has repeatedly demonstrated overwhelming military capability, yet military success has not always translated into durable political settlements. Likewise, regional military campaigns have often produced tactical victories while leaving the underlying political disputes unresolved.

History repeatedly reminds us that wars may destroy infrastructure, displace populations and alter military balances, but lasting peace ultimately depends upon political solutions acceptable to the principal parties involved.

This observation applies equally to every actor engaged in the present crisis.

No nation, regardless of its military strength, can permanently secure stability through force alone if the underlying causes of conflict remain unresolved. Equally, diplomacy cannot succeed if it is constantly undermined by renewed military escalation.

The humanitarian dimension must remain central to any serious discussion of regional peace.

The immense suffering experienced by civilians in Gaza, the displacement of populations in different parts of the region, the continuing uncertainty facing communities living under the constant threat of conflict, and the wider humanitarian consequences of prolonged instability all remind us that geopolitical competition carries profound human costs.

Lasting peace cannot simply be measured by the absence of missile strikes or military operations. It must also be measured by the restoration of human security, respect for international law, economic recovery and the opportunity for ordinary people to live without fear.

The reported negotiations also illustrate a broader transformation taking place within the international system.

The post-Cold War era, characterised by overwhelming American predominance, has gradually given way to a more complex and competitive international environment. Emerging powers increasingly influence regional diplomacy, economic partnerships and strategic calculations. Middle Eastern governments themselves exercise greater diplomatic autonomy than in previous decades, engaging simultaneously with multiple global partners.

Whether one describes this process as multipolarity, strategic diversification or geopolitical transition, it represents one of the defining characteristics of contemporary international relations.

Against this background, diplomacy between Washington and Tehran should not be viewed simply as a bilateral event. Rather, it forms part of a wider adjustment to an evolving international order in which no single actor can easily impose its preferred outcome upon an increasingly interconnected world.

*At the same time, caution remains essential.*

Diplomatic optimism should not obscure political realities. The issues dividing the United States and Iran—including sanctions, regional influence, security guarantees, missile capabilities and mutual distrust—cannot be resolved overnight. Likewise, the broader regional disputes involving Israel, Palestine, Lebanon, Syria and Yemen continue to present formidable obstacles to comprehensive peace.

For this reason, many observers regard the reported Memorandum of Understanding not as the conclusion of a conflict but as the possible beginning of a longer diplomatic process.

Whether that process ultimately succeeds will depend upon choices yet to be made by governments throughout the region.

The central question is therefore not simply whether Washington and Tehran can reach an agreement. The more important question is whether all those capable of influencing the region's future are prepared to replace cycles of military escalation with sustained political engagement.

If diplomacy is allowed to develop free from renewed military confrontation, the present moment may be remembered as the beginning of a gradual process of regional stabilisation.

If, however, military escalation once again overtakes political dialogue, any Memorandum of Understanding may prove to be no more than a temporary pause before another cycle of confrontation.

The future remains uncertain. Yet one lesson appears increasingly clear. Durable peace cannot be imposed by military power alone, nor can regional stability be secured through diplomacy that excludes the legitimate security concerns and political aspirations of the peoples most directly affected by conflict.

Ultimately, history will judge this moment not by the promises contained in diplomatic memoranda but by whether the peoples of the Middle East inherit a future defined by cooperation rather than confrontation, dialogue rather than destruction, and shared security rather than perpetual conflict.

## **Conclusion**

The analysis presented throughout this article suggests that the reported Memorandum of Understanding between the United States and Iran should be understood primarily as an attempt to manage conflict rather than resolve it. Diplomatic engagement between long-standing adversaries is an important development, but no bilateral understanding, however significant, can by itself overcome decades of strategic rivalry, regional competition and deeply rooted political disputes.

Perhaps the most significant lesson emerging from the present crisis is that the Middle East has entered a new strategic phase in which military superiority alone appears increasingly insufficient to determine political outcomes. Experience in Iraq, Afghanistan, Syria, Lebanon and, more recently, the confrontation involving Iran, demonstrates that while military campaigns may alter the balance of power temporarily, they seldom eliminate the political grievances that sustain conflict. Force may change circumstances on the battlefield, but it rarely provides a durable political settlement.

At the same time, the present crisis has once again highlighted the complexity of the regional environment. Any durable settlement must extend beyond relations between Washington and Tehran. The future of the Palestinian people, the humanitarian devastation in Gaza, continuing instability in Lebanon and Syria, the conflict in Yemen, the future of sanctions on Iran and wider regional security arrangements all form part of an interconnected geopolitical reality. Addressing one issue while leaving the others unresolved may reduce immediate tensions, but it is unlikely to produce lasting peace.

A further dimension that cannot be overlooked concerns the relationship between Israeli security policy and the broader regional environment. It is important to distinguish between the policies pursued by successive Israeli governments and the State of Israel as a whole, since governments, coalitions and political priorities have varied over time. Nevertheless, many critics argue that, despite these political changes, the core approach towards the Palestinian question has remained broadly consistent, particularly regarding settlement expansion, military operations and the pursuit of security through territorial control.

Critics further contend that these policies have been sustained by a combination of political, military and financial support from the United States and key Western allies. They point to the influence of pro-Israel advocacy organisations, political donors, evangelical constituencies, strategic alliances, congressional dynamics and broader domestic political considerations, arguing that American policy has been shaped by multiple interacting influences rather than any single factor. In their view, this combination of strategic and domestic considerations has often enabled successive Israeli governments to pursue controversial policies while facing limited international accountability. Others offer different interpretations, emphasising Israel's security concerns and the threats posed by armed groups in the region. Whatever one's perspective, it is evident that the Israeli-Palestinian conflict remains central to the wider strategic landscape and cannot be separated from broader efforts to achieve regional stability.

Within this broader context, the emergence and persistence of regional resistance movements cannot be understood in a political vacuum. While their objectives, methods and external support differ significantly, many analysts argue that prolonged occupation, unresolved political grievances, regional rivalries, ideological movements, foreign intervention and the absence of comprehensive political settlements have all contributed to their development and endurance. Whether one agrees with this assessment or not, it illustrates the complexity of a conflict that cannot be resolved through military means alone. Sustainable regional security is therefore likely to require not only military deterrence but also credible political processes capable of addressing the underlying causes of instability.

Beyond the immediate regional context, the reported negotiations also reflect broader changes in the international system. The period of overwhelming post-Cold War predominance by a single global power has gradually given way to a more complex international order characterised by the growing influence of China, Russia, India, Türkiye, the Gulf States and other emerging actors. This

evolving geopolitical environment increasingly encourages diplomacy, strategic balancing and multilateral engagement rather than exclusive reliance upon military power.

The Middle East now appears to be entering a period in which no regional or global power can unilaterally impose a lasting political order. Military superiority remains an important element of national power, but it is increasingly constrained by regional resistance, shifting alliances, emerging global powers, economic interdependence and the enduring political aspirations of the peoples of the region. Whether the reported Memorandum of Understanding becomes a genuine step towards regional stability or merely another temporary pause before renewed confrontation will ultimately depend upon whether these deeper political realities are acknowledged and addressed through an inclusive and comprehensive diplomatic process.

Whether the reported Memorandum of Understanding ultimately becomes the foundation for wider regional dialogue or merely postpones another cycle of confrontation remains uncertain. Its long-term success will depend less upon the wording of any diplomatic document than upon the willingness of regional and international actors to address the underlying political disputes that have shaped the Middle East for generations.

Ultimately, history will judge this moment not by the signing of a memorandum alone but by whether it contributes to a more just, stable and secure regional order. A durable peace will require political courage, consistent respect for international law, meaningful protection of civilian populations, recognition of the legitimate security concerns and political aspirations of all peoples in the region, and a genuine commitment to resolving conflicts through dialogue rather than force. Only within such a comprehensive framework can a temporary diplomatic understanding evolve into a lasting peace.

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