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THE UNFINISHED US–IRAN CONFLICT: FROM OPEN CONFRONTATION TO STRATEGIC SILENCE

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Abstract

Background: *Relations between the United States and Iran have moved from partnership to one of the most durable rivalries in international politics. The war that began on 28 February 2026, followed by a ceasefire and a memorandum of understanding that collapsed within weeks, has left the dispute unresolved. This article asks what happens when open fighting gives way to lower or intermittent violence without a political settlement.*

Methods: *A qualitative design combining historical analysis and documentary review was used, drawing on the literature on security dilemmas, deterrence, coercive diplomacy and "no war, no peace" situations, and on official, scholarly and press sources up to 19 November 2026. The article proposes "strategic silence" as an analytical concept and codes the 2026 conflict against four indicators: direct military exchanges, economic coercion, diplomatic engagement and the status of formal agreements.*

Findings: *Strategic silence, meaning stalled diplomacy alongside continuing blockade, sanctions, military readiness and limited strikes, is neither peace nor stable restraint. In 2026 it oscillated and was repeatedly interrupted by renewed fighting. Disputes over the sequence of concessions, weak verification and the absence of guarantees prevented the April ceasefire and the June memorandum from becoming a settlement.*

Conclusions: *A durable settlement would require verifiable nuclear limits, reciprocal security assurances, credible and phased sanctions relief, maritime confidence-building and sustained regional diplomacy.*

INTRODUCTION

Few bilateral relationships have shaped Middle Eastern politics as persistently as the one between Washington and Tehran. When the monarchy of Mohammad Reza Shah Pahlavi fell in 1979, Iran passed from being one of America's principal regional partners to being defined, in its own political identity, by resistance to American influence (Abrahamian, 2008). The seizure of the US Embassy in Tehran in November 1979, and the 444-day hostage crisis that followed, hardened that rupture; Washington broke diplomatic relations in April 1980 (Emery, 2013; Farber, 2005). Mutual suspicion became an organising assumption of policy in both capitals.

The rivalry then widened well beyond its diplomatic origins. The Iran–Iraq War, the American naval presence in the Gulf, Iran's network of regional partners and, above all, the dispute over Iranian nuclear activity added layers of mistrust (Chubin, 2006; Razoux, 2015). The 2015 Joint Comprehensive Plan of Action (JCPOA) showed that verification-based diplomacy could narrow even a deep disagreement (Serim, 2022). The American withdrawal in 2018 and the return of sanctions then undermined confidence that negotiated commitments would outlast a change of government in Washington, and fed a renewed spiral of pressure and nuclear escalation (Kamel, 2024; Valadbaygi, 2023).

The 2026 war is a qualitative break from this pattern. According to the Congressional Research Service (CRS), US and Israeli strikes beginning on 28 February 2026 set off a regional war in which Iran struck targets across the Middle East and used threats and attacks on shipping to challenge passage through the Strait of Hormuz. An April ceasefire and a June memorandum of understanding (MoU) were meant to end the fighting and open talks on a final deal, but the MoU collapsed amid renewed combat and formally lapsed in August (Thomas et al., 2026). By September the CRS described the conflict as resembling a war of attrition, with intermittent exchanges of fire running alongside a stepped-up sanctions campaign (Thomas et al., 2026).

Late 2026 remains unsettled. Reuters reported on 17 November that, nearly nine months into the war, each government was behaving as though time favoured it, leaving talks stuck on the order of concessions: Tehran wanted the blockade lifted, frozen assets released and oil sales restored before substantive nuclear negotiation, while Washington wanted reciprocal steps and verifiable nuclear commitments from the outset (Nakhoul & Irish, 2026). In the same week, reporting described drone attacks on Kuwait and exchanges of strikes involving Qeshm Island and Bahrain (Al Jazeera, 2026), and renewed attacks on Gulf states and tankers (CBS News, 2026). A fall in the volume of fighting therefore cannot be read as the end of the conflict.

This article uses "strategic silence" to name the phase between open confrontation and settlement in which diplomacy is stalled but coercion continues. The term is an analytical device developed for this article; it is not an established theory. The central claim is that strategic silence is not peace: it is an unstable condition in which restraint and coercion coexist. The study asks five questions. (1) Which historical and geopolitical factors have sustained the rivalry? (2) Why has the conflict oscillated between open confrontation and restraint? (3) How do sanctions, nuclear disputes and deterrence shape each side's calculations? (4) What roles do regional and international actors play? (5) Under what conditions could strategic silence give way to a durable settlement?

2. Research Objectives

- To trace the historical and geopolitical foundations of the US–Iran conflict.
- To analyse the movement between open confrontation, restraint and diplomatic stalemate.
- To assess how nuclear disputes, economic sanctions and deterrence sustain bilateral tension.
- To compare the strategic interests and decision-making constraints of Washington and Tehran.

- To examine the consequences of the conflict for regional stability, maritime security and the wider international system.
- To identify diplomatic pathways that could lower the risk of escalation and support a durable settlement.

3. Research Methodology

3.1 Research design

The study is a qualitative, interpretive case study. It combines historical analysis with documentary review and uses a modified form of process tracing: the relationship is divided into phases, and each phase is examined for the instruments each side used, the demands each made and the outcome of the interaction (George, 1991). The historical analysis runs from the 1953 coup and the 1979 revolution to 19 November 2026, with particular attention to the JCPOA (2015), the US withdrawal (2018) and the 2026 war. The research is not statistical and makes no attempt to estimate the causal effect of sanctions or strikes. Its aim is to explain how historical grievance, security fears, economic pressure and diplomatic mistrust interact to keep the rivalry alive.

3.2 Sources and evidence hierarchy

Evidence is organised in three tiers. The first tier consists of official and institutional documents: a CRS report on the 2026 conflict that covers developments to 18 September 2026 (Thomas et al., 2026), UN Security Council Resolution 2231 (United Nations Security Council, 2015), International Atomic Energy Agency (IAEA) reporting (International Atomic Energy Agency, 2025) and US Energy Information Administration data (U.S. Energy Information Administration, 2025). The second tier is peer-reviewed and scholarly work on US–Iran relations, nuclear diplomacy, sanctions, deterrence and rivalry. The third tier is contemporary journalism, used only for events after the CRS cut-off and always attributed and dated (Al Jazeera, 2026; CBS News, 2026; Nakhoul & Irish, 2026). A claim that rests only on third-tier evidence is presented as a report, not as an established fact.

3.3 Analytical procedure

First, the conflict is periodised using the dated events summarised in Table 1. Second, each phase is coded against four indicators of strategic silence developed in Section 8: the frequency of direct military exchanges, the continuity of economic coercion, the level of diplomatic engagement and the status of formal agreements. Third, the resulting pattern is compared with expectations drawn from the theoretical framework. Because the coding is qualitative, Figure 3 is offered as an illustration of the argument and not as a measurement.

3.4 Limitations of the method

Information on military operations, nuclear material and confidential negotiations is incomplete and contested, and press accounts of a fast-moving war can be revised. Casualty and cost figures cited from official sources are those of the reporting bodies and are not independently verified here. These limits are discussed further in Section 15.

4. Theoretical Framework

4.1 Realism and the security dilemma

Structural realism holds that states in an anarchic system must rely on their own capabilities for security (Waltz, 1979). Applied to this case, Washington seeks to protect its forces and partners, preserve freedom of navigation and prevent nuclear proliferation, while Tehran seeks regime survival, strategic autonomy and protection against outside intervention. The security dilemma explains why steps that one side regards as defensive can appear threatening to the other. American deployments, sanctions and blockade are presented in Washington as deterrence and non-proliferation, but may be read in Tehran as coercion or preparation for regime change; Iranian missile, nuclear and regional policies are framed in Tehran as defence yet are perceived as threats by the United States, Israel and Gulf states. Jervis showed that uncertainty about intentions can intensify competition even between states that

do not seek unlimited war (Jervis, 1978), and Glaser later argued that the severity of the dilemma depends on whether adversaries are mainly security-seeking and on how clearly defensive and offensive capabilities can be distinguished (Glaser, 1997). Misperception compounds the problem, because leaders tend to fit new information into existing beliefs about an opponent (Jervis, 1976).

4.2 Deterrence and compellence

Deterrence persuades an adversary not to act by threatening costs that outweigh expected gains, whereas compellence tries to make an adversary change something it is already doing or holding. Schelling observed that compellence is generally harder, because compliance is visible and can look like capitulation (Schelling, 1966). This distinction matters here. Deterrence by the United States and its partners, and by Iran's missile and maritime capabilities, can help prevent a particular escalation, but it does not remove the political disputes that produced the rivalry. Efforts to compel Iran to give up enrichment, missile capabilities or its claim to influence over Hormuz face the compellence problem in a particularly acute form.

4.3 Coercive diplomacy

George defined coercive diplomacy as the use of threats or limited force to persuade an opponent to stop or reverse an action, and stressed that it works best when demands are clear, a sense of urgency is conveyed, the adversary believes the threat is credible, and the coercer offers an acceptable way out (George, 1991). US sanctions, blockade and military pressure and Iran's regional leverage can all be analysed in this way. Coercion can produce incentives to bargain, but it can also stiffen resistance when demands appear unacceptable or when promises of relief are not credible. In bargaining terms, war and prolonged confrontation often reflect private information and commitment problems, not simply incompatible goals (Fearon, 1995).

4.4 Rivalry and the "no war, no peace" literature

Research on enduring rivalries treats hostile dyads as relationships that persist over long periods through cycles of crisis and quiescence (Diehl & Goertz, 2000; Thompson, 2001). Studies of stalled peace processes describe situations in which violence has declined and agreements exist on paper but underlying disputes are unaddressed (Mac Ginty, 2006). Galtung's distinction between the absence of direct violence ("negative peace") and the presence of just and cooperative structures ("positive peace") is a further reminder that quiet is not settlement (Galtung, 1969). Strategic silence draws on these ideas but concentrates on a specific feature of the US–Iran case: coercive instruments continue after diplomacy has stalled. It is therefore proposed as a complement to, not a substitute for, concepts such as ceasefire, de-escalation or frozen conflict.

5. Historical Evolution of US–Iran Relations

Figure 1 summarises the main milestones that frame the analysis. The sections that follow discuss them in turn.

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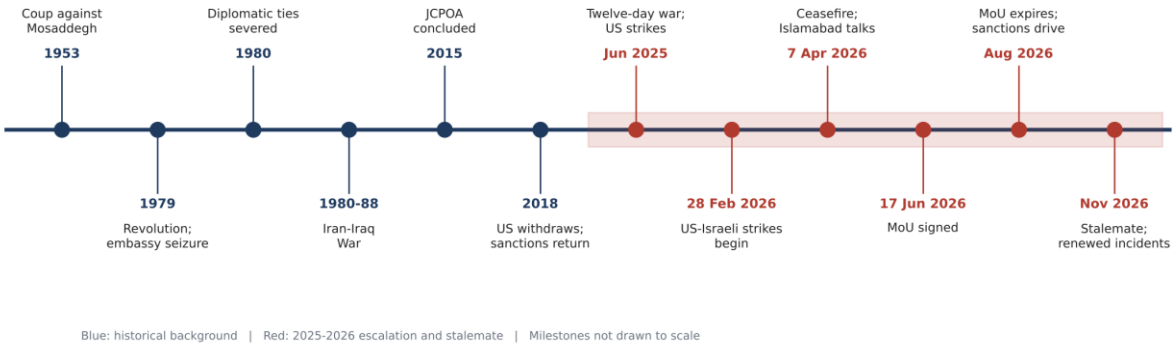


Figure 1. Milestones in US–Iran relations, 1953–2026 (not drawn to scale). Source: authors' compilation based on (Abrahamian, 2008; Emery, 2013; Serim, 2022; Thomas et al., 2026).

5.1 Foundations: the 1953 coup, the 1979 revolution and the hostage crisis

The roots of Iranian distrust predate 1979. In August 1953 a coup carried out with American and British involvement removed Prime Minister Mohammad Mosaddegh and consolidated the Shah's authority (Abrahamian, 2008; Kinzer, 2003). For many Iranians this episode became evidence of foreign interference, and it shaped the revolutionary narrative that later toppled the monarchy. Before 1979 Iran was a close strategic partner of Washington; the revolution replaced that partnership with an Islamic Republic whose legitimacy drew partly on opposition to foreign domination (Abrahamian, 2008). The embassy seizure and hostage crisis transformed the relationship, led to the break in relations in 1980 and left a durable symbolic legacy in both countries (Emery, 2013; Farber, 2005; Pazuk, 2022).

5.2 The Iran–Iraq War and the formation of Iran's security outlook

The Iran–Iraq War (1980–1988) left Iran with heavy human and economic losses, diplomatic isolation and lasting scepticism about outside security guarantees. Iraq's use of chemical weapons, and the weak international response, reinforced the lesson that Iran could not depend on others for protection (Razoux, 2015). Over time Tehran invested in missile capabilities, asymmetric naval and drone tactics and partnerships with non-state and allied actors, an approach designed to impose costs on stronger adversaries. Washington, for its part, increasingly saw Iran through the prism of Gulf stability, energy security and the defence of its regional partners (Parsi, 2007).

5.3 The nuclear dispute

Iran's nuclear programme became a leading international concern after 2002, when previously undeclared facilities came to light, raising questions about enrichment, safeguards and possible military dimensions (Chubin, 2006; Mousavian, 2012). Iran, a party to the Non-Proliferation Treaty, has maintained that its programme is peaceful and that the treaty protects its right to civilian nuclear technology (United Nations, 1968). The United States and many other states argued that enrichment capacity and a record of incomplete transparency made intrusive limits and verification necessary. The dispute became entangled with wider questions of regional power and trust.

5.4 The JCPOA and the diplomatic opening

Concluded in July 2015 between Iran and the P5+1, the JCPOA capped Iranian enrichment and stockpiles and created an inspection regime in exchange for nuclear-related sanctions relief; the

Security Council endorsed it in Resolution 2231 (United Nations Security Council, 2015). Scholars regard it as a rare non-proliferation success, though one that depended on continued political backing in the participating states (Serim, 2022). Critical political-economy readings stress that the deal also reflected wider interests in capital flows, great-power rivalry and regional power agency (Valadbaygi, 2023).

5.5 Withdrawal, maximum pressure and the road to 2026

In May 2018 the United States withdrew from the JCPOA and reimposed sanctions, and Iran later scaled back compliance in stages. Kamel's analysis of the Trump administration's approach argues that coercion failed to deliver a new deal in part because pressure was not paired with a credible and mutually acceptable diplomatic path (Kamel, 2024). Tehran drew the lesson that sanctions relief could be reversed by an electoral change in Washington, while American policymakers concluded that Iran would trade only under pressure. According to the CRS, negotiations in spring 2025 and again in early 2026 were cut short by US and/or Israeli military action; the June 2025 Israel–Iran "twelve-day war" and US strikes on nuclear sites left the IAEA unable to conduct safeguards at the facilities that were hit (Thomas et al., 2026).

6. The Nuclear Dispute and the Collapse of Diplomatic Trust

6.1 Competing interpretations

For Washington the core concern is that expanded Iranian enrichment shortens the time needed to produce weapons-grade material and could trigger proliferation elsewhere in the region. US policy has therefore emphasised limits on enrichment, monitoring and assurances that Iran will not acquire a weapon. Tehran emphasises its sovereign right to peaceful nuclear technology and complains of discriminatory treatment (Chubin, 2006). By September 2026 US officials were describing prevention of an Iranian bomb as the leading war aim, with the emphasis now on denying Iran the economic resources to rebuild its programme (Thomas et al., 2026).

6.2 Verification and the credibility problem

An agreement is only as strong as the confidence that it will be implemented and verified. The IAEA's access and reporting are therefore central, as the monitoring arrangements described in its reporting under Resolution 2231 illustrate (International Atomic Energy Agency, 2025; United Nations Security Council, 2015). Where inspections lapse or political trust collapses, each side tends to interpret ambiguous information in its worst-case form. Commitment problems of this kind are a classic source of bargaining failure (Fearon, 1995), and they are sharpened when one party can reverse its commitments, as the 2018 withdrawal demonstrated (Kamel, 2024).

6.3 The nuclear issue after the 2026 conflict

The 2026 war has added uncertainty about the condition of nuclear facilities, the whereabouts of enriched material and the future of international monitoring. The CRS notes that Iran's nuclear facilities did not appear among the main target categories in 2026, that the IAEA has not been able to conduct safeguards at sites struck in 2025, and that Iran's stockpile of highly enriched uranium features among possible targets in any escalation (Thomas et al., 2026). Strikes can damage facilities but cannot erase technical knowledge or the political motives behind a programme. Claims about the precise location or condition of nuclear material should be treated with caution unless backed by verified inspection data.

6.4 Nuclear diplomacy as a condition for settlement

A sustainable accord would require verifiable limits, credible inspection procedures, defined responses to non-compliance and reciprocal incentives. Sanctions relief would have to be predictable enough to give Tehran a reason to accept constraints, while monitoring would have to be robust enough to answer proliferation concerns. Research on the durability of

agreements finds that settlements last longer when they contain strong, specific implementation provisions such as monitoring bodies and dispute-resolution mechanisms (Fortna, 2003). Without them, a new agreement could reproduce the weaknesses of earlier diplomacy.

7. The 2026 Military Confrontation: Escalation and Fragile De-escalation

7.1 The outbreak of war

The CRS records a US military build-up near Iran from late December 2025 and the start of US and Israeli strikes on 28 February 2026 (Operation Epic Fury and Operation Roaring Lion). American targets included missile and drone sites, air defences, naval assets and command centres, while Israeli strikes focused on the Iranian leadership; Supreme Leader Ali Khamenei was killed on the first day and was succeeded by Mojtaba Khamenei on 8 March (Thomas et al., 2026). Iran responded with hundreds of missiles and thousands of drones against Israel and Gulf states, including bases, diplomatic facilities and energy installations, and attacked commercial shipping (Thomas et al., 2026). Casualty figures are contested. The CRS reports 3,636 Iranians killed as of 7 April (including 1,701 civilians, according to a human-rights monitoring group) and 18 US service members killed and 824 wounded by mid-September (Thomas et al., 2026). It also notes a reported strike on a school in Minab that killed more than 150 people, mostly children, and that a preliminary US military inquiry reportedly found the United States responsible (Thomas et al., 2026).

7.2 The Strait of Hormuz and regional spillover

Hormuz became the main pressure point. Iranian threats and attacks on commercial vessels and naval ships sharply reduced traffic in the early days of the conflict and disrupted global markets for oil, gas and other commodities, and traffic has since fluctuated with the alternation of fighting and diplomacy (Ratner et al., n.d.; Thomas et al., 2026). The conflict also reignited fighting in Lebanon, where Hezbollah's attacks prompted large Israeli operations, intensified Houthi attacks affecting Saudi-linked shipping and energy infrastructure, and exposed Iraq to strikes by and against Iran-aligned groups (Thomas et al., 2026). A bilateral rivalry thus became a regional war, with effects on states that were not parties to the original dispute.

7.3 Ceasefire, blockade and the June memorandum

The United States and Iran agreed a two-week ceasefire on 7 April, extended indefinitely on 21 April after talks in Islamabad led by Vice President JD Vance failed to produce a broader agreement; in the interval Washington imposed a blockade on shipping to and from Iranian ports from 13 April (Thomas et al., 2026; Thomas, 2026). Pakistan, Qatar and other interlocutors helped sustain diplomacy in this period (Thomas et al., 2026). On 17 June the two presidents signed an MoU that declared an end to military operations, committed Washington to end the blockade, issue sanctions waivers and release frozen assets, committed Iran to arrange safe passage through Hormuz without charge for 60 days, and set a 60-day window to negotiate a final deal covering sanctions and nuclear questions (Thomas et al., 2026). The blockade was lifted on 18 June.

7.4 Collapse of the MoU and the sanctions campaign

The MoU did not survive. After tankers began using a southern route near Omani waters, Iran attacked commercial vessels; the United States struck Iran on 26 June, rescinded its oil licence, launched extensive strikes on 7 July and reimposed the blockade on 14 July, while the President declared the MoU over on 8 July. The 60-day deadline for a final deal passed on 17 August (Thomas et al., 2026). The CRS attributes part of the failure to a clash of interpretations over the MoU's clause on future administration of Hormuz, which Iran read as a right to control traffic and Washington and its Gulf partners rejected (Thomas et al., 2026). A US "economic D-Day" announced on 19 August and a Treasury campaign from 24 August then intensified

sanctions on Iranian sectors and on third-country entities, and early September saw renewed exchanges, including US strikes on Iranian tankers (Thomas et al., 2026). Iranian inflation reportedly reached 84 per cent in August and the rial fell to a record low in September, although the CRS also quotes analysts who argue that the Iranian government has pushed some of the pain onto households (Thomas et al., 2026).

Table 1. Selected turning points in the 2026 conflict. Source: compiled from (Thomas et al., 2026).

Date (2026)	Development
28 Feb	US and Israeli strikes begin; Iran retaliates across the region; Hormuz traffic collapses.
7 Apr	Two-week ceasefire; talks in Islamabad follow but yield no broader agreement.
13–21 Apr	US blockade of Iranian ports begins (13 Apr); ceasefire extended indefinitely (21 Apr).
17–18 Jun	MoU signed (17 Jun); US blockade ended (18 Jun); oil licence issued (21 Jun).
26 Jun–14 Jul	Attacks on shipping and US strikes; oil licence rescinded; MoU declared over (8 Jul); blockade reinstated (14 Jul).
17 Aug	60-day deadline for a "final deal" passes; MoU formally lapses.
19–24 Aug	US announces a sweeping economic pressure campaign and new Treasury sanctions.
Sep	Strikes resume; US hits Iranian tankers (8 Sep); CRS describes a war of attrition.
16–19 Nov	Reuters reports deepening stalemate and a sequencing dispute; drone, tanker and base incidents continue.

7.5 The November 2026 stalemate

Reuters reported on 17 November that talks were deadlocked over sequencing and that both governments appeared to believe that time was on their side; Gulf states reportedly warned Washington that renewed bombing could provoke Iranian retaliation against their infrastructure, and sources suggested that fighting might resume before any deal (Nakhoul & Irish, 2026). Contemporaneous reports described attacks on tankers and Gulf states and an exchange of strikes involving Qeshm Island and Bahrain (Al Jazeera, 2026; CBS News, 2026). Figure 3 (Section 8) places these developments in the conceptual framework; these reports should be read as time-specific accounts and not as final assessments of how the conflict will end.

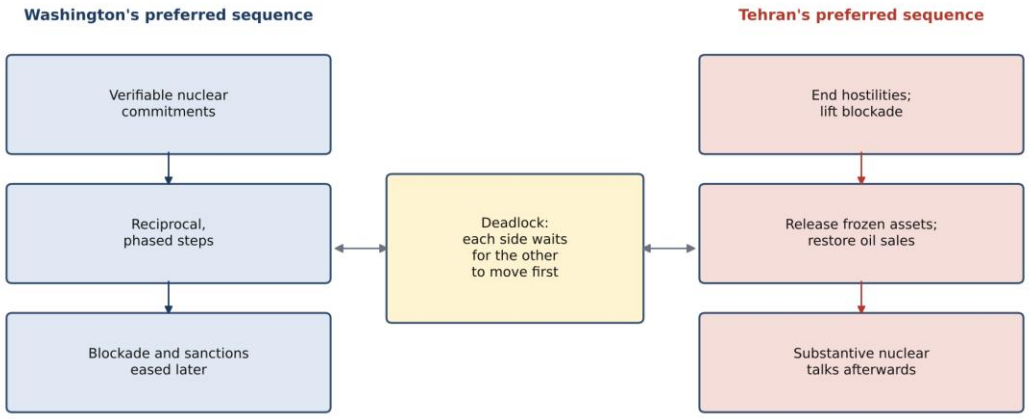


Figure 2. The sequencing deadlock in late 2026. Source: authors' synthesis of (Nakhoul & Irish, 2026; Thomas et al., 2026).

8. From Open Confrontation to Strategic Silence

8.1 Defining strategic silence

The 2026 record suggests a refinement of the working definition offered in the Introduction. Here, strategic silence is a phase of an unresolved rivalry in which (a) the political and diplomatic channels needed to resolve the dispute are largely inactive or deadlocked, while (b) coercive instruments, including blockade, sanctions, military readiness and limited or intermittent strikes, continue at a lower or less continuous level than in open war. "Silence" therefore refers mainly to the absence of a political conversation, not necessarily to the absence of gunfire. The concept is intended to separate a reduction in the visibility of violence from the resolution of the conflict that produced it.

8.2 Distinguishing related concepts

Table 2 locates strategic silence relative to concepts that are often used interchangeably.

Table 2. Strategic silence compared with related concepts. Source: authors' synthesis drawing on (Diehl & Goertz, 2000; Fortna, 2003; Galtung, 1969; Mac Ginty, 2006).

Concept	Core feature	Relation to strategic silence
Ceasefire	Formal or informal suspension of hostilities.	May coincide with silence, but silence can persist without any ceasefire.
De-escalation	Decline in the intensity of confrontation.	Describes direction of change; says nothing about stalled diplomacy.
Frozen conflict	Hostilities largely halted, dispute unresolved, status quo locked in.	Silence is more fluid: coercion continues and violence can recur.
No war, no peace	Stalled peace process; accords exist but are not implemented.	Closest relative; silence stresses continuing coercive instruments.
Conflict resolution	Underlying issues addressed; positive peace.	Silence is by definition not resolution.

8.3 Why states choose restraint

A state may reduce direct military action when the expected costs of escalation exceed the gains. Those costs include casualties, financial outlay, damage to infrastructure, disruption of energy markets, diplomatic isolation and the risk of a wider war. By September 2026 the CRS reported US operating costs of about 33 billion dollars by late June and a Congressional Budget Office estimate of 38 billion by 1 August, together with a Pentagon assessment of strategic munitions shortfalls (Thomas et al., 2026). Restraint may therefore be a strategic choice and not a sign of reconciliation. The CRS lists prolonged low-level conflict, an uneasy ceasefire, expanded military action, a negotiated settlement and the fall of the Iranian government as scenarios that are not mutually exclusive (Thomas et al., 2026).

8.4 Washington's calculations

For Washington, prolonged war carries financial, military and political costs: strained munitions stocks and naval logistics, damaged regional bases, energy-price effects and domestic opposition (Thomas et al., 2026). Economic pressure and blockade can look like cheaper alternatives to sustained bombing. The CRS records mixed signals from US officials on whether sanctions are meant to bring Iran to the table or simply to punish it (Thomas et al., 2026), and Reuters describes a US preference for waiting out Tehran while demanding verifiable nuclear commitments (Nakhoul & Irish, 2026).

8.5 Tehran's calculations

Iran faces severe economic strain and heavy military losses, yet its leadership appears to regard the regime as having survived an existential threat and to see concessions under duress as politically dangerous (Thomas et al., 2026). The CRS reports debate inside Iran between leaders who favour negotiation and hardliners who oppose compromise on enrichment or on Hormuz, and notes that the Supreme Leader has not appeared publicly since taking office, complicating the

reading of Iranian intentions (Thomas et al., 2026). Tehran's bargaining strategy combines endurance, the geography of Hormuz and pressure on Gulf partners of the United States (Nakhoul & Irish, 2026; Thomas et al., 2026).

8.6 Silence as communication and as a source of miscalculation

Limited public communication can serve to avoid immediate escalation, protect negotiating flexibility or signal that a government will not respond on its adversary's schedule. However, thin channels also raise the risk of misreading intentions, a central concern in the misperception literature (Jervis, 1976). When military and political channels are weak, ambiguous signals, accidents at sea or attacks by partners can be mistaken for deliberate escalation. Strategic silence reduces visibility without removing the risk of accidental war.

8.7 Operationalising strategic silence

To make the concept testable, Table 3 sets out four indicators, which also structure the coding in Figure 3.

Table 3. Indicators of strategic silence and their application to late 2026. Source: authors' framework; empirical entries from (CBS News, 2026; Nakhoul & Irish, 2026; Thomas et al., 2026).

Indicator	Marker of strategic silence	Observation, Sep–Nov 2026
Direct military exchanges	Intermittent rather than continuous; below the level of full-scale war.	Periodic US strikes and Iranian attacks on ships and Gulf targets.
Economic coercion	Blockade and sanctions persist or intensify.	Blockade reinstated in July; new sanctions from late August.
Diplomatic engagement	Channels indirect, stalled or confined to sequencing disputes.	Indirect talks stuck on order of concessions.
Formal agreements	Previous accords lapsed or unimplemented.	MoU declared over and formally expired.

8.8 Applying the concept to 2026

Figure 3 codes five phases of the 2026 conflict on two dimensions: the level of political and diplomatic engagement and the intensity of coercive and military activity. After open confrontation (phase 1) and a bargaining phase that peaked with the June MoU (phases 2–3), the relationship slid back toward high coercion with little diplomacy (phase 4) and then, from September, into a condition in which exchanges of fire were intermittent but talks were stalled (phase 5). The November reports, however, show that this condition can deteriorate quickly. The case therefore supports a refinement of the concept: strategic silence is better understood as an *oscillating* phase that can slip back into open confrontation, or, if diplomacy is revived, move toward a settlement, than as a stable equilibrium.

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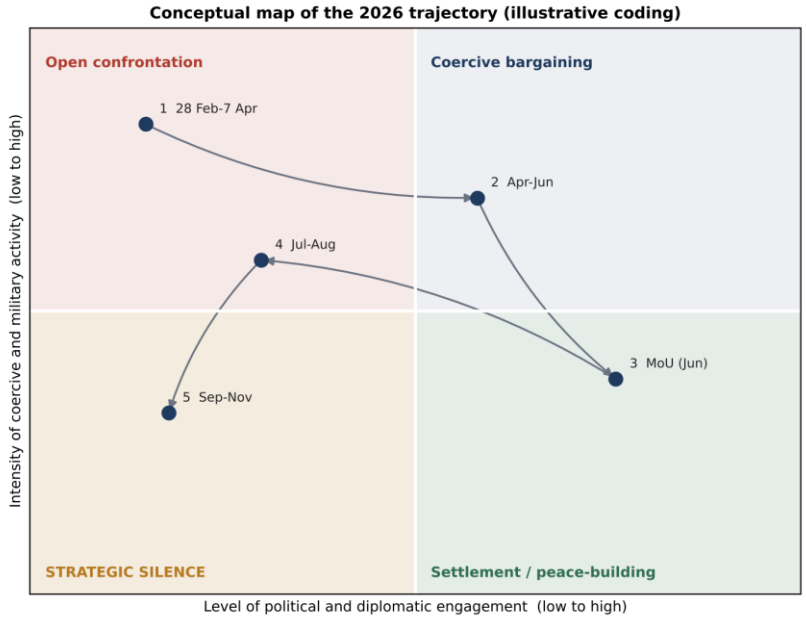


Figure 3. Conceptual map of the 2026 trajectory. The positions are the authors' qualitative coding of (CBS News, 2026; Nakhoul & Irish, 2026; Thomas et al., 2026) and are illustrative, not measured data.

8.9 Strategic silence is not peace

A ceasefire suspends hostilities, de-escalation reduces their intensity, and conflict resolution addresses the issues that sustain the dispute. Strategic silence may occur alongside a ceasefire or de-escalation but is not itself resolution. Evidence from the study of peace agreements suggests that pauses in fighting hold best when backed by monitoring, guarantees and dispute-resolution procedures (Fortna, 2003; Walter, 2002), and these were largely absent in 2026. The continuing incidents and unresolved demands reported in November show why the distinction matters (CBS News, 2026; Nakhoul & Irish, 2026).

9. Economic Sanctions and the Politics of Strategic Pressure

9.1 Sanctions as an instrument

Sanctions on oil exports, banking, investment and market access have been a central instrument of US policy toward Iran, often at the direction of Congress (Rosen & Thomas, n.d.). They can impose heavy costs, yet comparative studies show that they achieve ambitious political goals only in a minority of cases and succeed more often when goals are modest (Hufbauer et al., 2007). Their effect depends on clear demands, the unity of the sanctioning coalition, the target's resilience and a credible route to relief (Pape, 1997).

9.2 Adaptation and the limits of pressure

Iran has sought to adapt through domestic production, alternative trade partners and regional commercial links. Adaptation lessens but does not eliminate the damage; sanctions have been associated with inflation, currency instability and limited access to technology and finance (Thomas et al., 2026). Pape argued that sanctions can also stimulate nationalist rallying and thereby narrow the space for compromise (Pape, 1997). Drezner's "sanctions paradox" adds that targets in intense conflict relationships are especially reluctant to concede, because concessions carry reputational costs and may strengthen a rival (Drezner, 1999).

9.3 The coercion–negotiation paradox

Pressure can create incentives to negotiate, but open-ended pressure can undermine the credibility of promised relief: if a target doubts that

concessions will bring durable benefits, it has little reason to concede (George, 1991; Kamel, 2024). The 2026 sequencing dispute is a direct illustration (Figure 2): Tehran wants the blockade and sanctions eased before it enters substantive nuclear talks, while Washington wants reciprocal steps first (Nakhoul & Irish, 2026). The June MoU tried to break the deadlock by promising immediate sanctions relief against a 60-day negotiating window, but its collapse suggests that simultaneous implementation, with verification and a dispute-resolution mechanism, may be needed (Fortna, 2003; Thomas et al., 2026).

10. The Strait of Hormuz: Maritime Security and Geopolitical Leverage

10.1 Strategic importance

The Strait of Hormuz links the Persian Gulf with the Gulf of Oman and the Arabian Sea. In 2024, oil flows through it averaged about 20 million barrels per day, equal to roughly a fifth of global petroleum-liquids consumption, and about a fifth of global liquefied natural gas trade, mainly from Qatar, also passed through it (U.S. Energy Information Administration, 2025). Only Saudi Arabia and the United Arab Emirates have pipelines that can bypass the Strait, and their spare capacity is limited (U.S. Energy Information Administration, 2025). Disruption therefore affects oil and gas supply, freight and insurance costs and the economies of import-dependent states.

10.2 Iran's geographic leverage

Iran's long coastline on the northern side of the Strait gives it the ability to threaten commercial traffic with mines, small craft, drones and coastal missiles, thereby raising the cost of military pressure against it. The CRS observes that Iran's asymmetric capabilities could make reopening the Strait by force difficult even after the destruction of much of its conventional navy (Thomas et al., 2026). Maritime pressure is nonetheless a double-edged instrument, as it also damages regional economies, including those of states friendly to Iran, and invites international responses.

10.3 US interests and freedom of navigation

Washington has an interest in freedom of navigation, protection of shipping and reassurance of partners, and has maintained around 20 Navy vessels to enforce its blockade and escort traffic (Thomas et al., 2026). Yet protective measures can themselves become part of the conflict if Iran reads them as coercive restrictions, as the dispute over the southern shipping route in June and again in November indicates (CBS News, 2026; Thomas et al., 2026). Legal positions add complexity: the law of the sea provides for transit passage through straits used for international navigation, but neither Iran nor the United States is a party to the 1982 Convention, and each interprets navigation rights differently (United Nations, 1982).

10.4 Global economic consequences

Figure 4 plots the CRS's selected Brent crude prices for 2026, which rose from about 72 dollars on the eve of the war to more than 118 dollars by the end of March, fell back to about 72 dollars on 1 July after the MoU, and climbed again to about 108 dollars by 10 September (Thomas et al., 2026). Energy-importing states, among them Pakistan, are exposed to higher import bills, pressure on foreign-exchange reserves and inflation when such price swings persist. The CRS also records that the combined disruption of Hormuz and the Red Sea has lengthened export routes for Saudi crude and cut Iraqi oil revenue (Ratner et al., n.d.; Thomas et al., 2026). Maritime security in the Strait is thus an international concern and not a bilateral matter.

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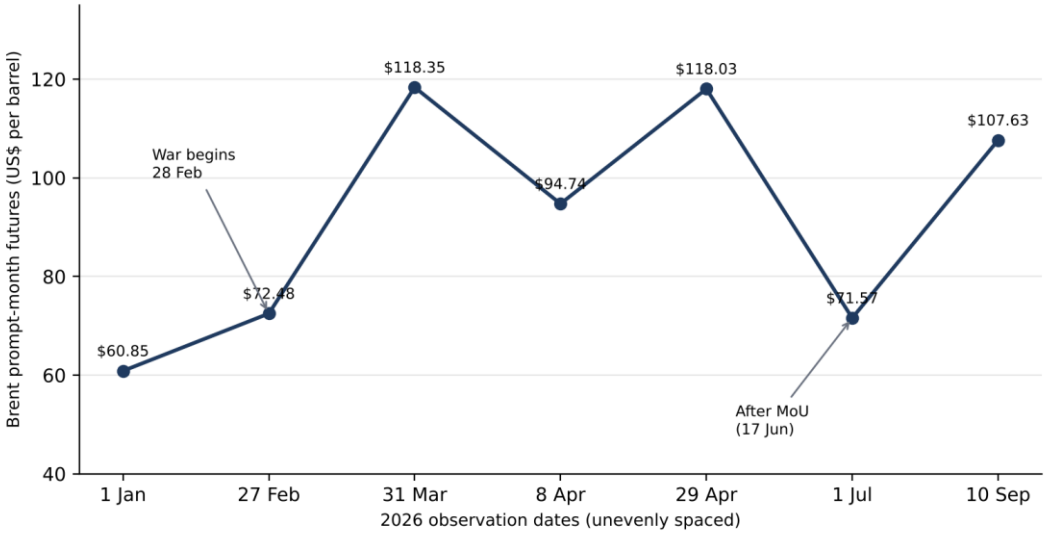


Figure 4. Brent crude oil prompt-month futures on selected 2026 dates. Source: plotted by the authors from data reported in (Thomas et al., 2026).

11. Regional and International Actors

11.1 Pakistan

Pakistan has direct interests in stability along its western border and in its economic and energy links with the Gulf. Its working relations with Iran, the Gulf monarchies and the United States have made it an intermediary: the April talks between US and Iranian delegations took place in Islamabad, and the CRS lists Pakistan among the states that helped facilitate diplomacy (Thomas et al., 2026). In August 2026 Saudi Arabia, Turkey and Pakistan concluded the Mecca Joint Defense Agreement, which analysts quoted by the CRS interpret as an attempt by regional powers to avoid a security vacuum while questioning whether it can sustain credible deterrence without the United States (Thomas et al., 2026). Pakistan's mediation is most constructive when it supports communication and a process acceptable to the principal parties, not when it appears to endorse one side's objectives.

11.2 Oman, Qatar and other mediators

Oman and Qatar maintain channels to actors that lack normal diplomatic relations. The MoU assigned Oman a role in defining future arrangements for the Strait, and Omani-mediated contacts between US officials and the Houthis are reported by the CRS, which also notes efforts by regional states to restart US–Iran diplomacy (Thomas et al., 2026). Such mediators are most useful when direct negotiation is politically costly, since they can transmit proposals, test positions and design confidence-building steps.

11.3 China and Russia

The CRS reports that China continued to import Iranian oil until the US blockade and that US authorities sanctioned Chinese entities in May 2026 for allegedly supplying satellite imagery to Iran, while Russia is reported by media and think-tank accounts to have supplied materiel, intelligence and technical help; President Trump has publicly doubted that either state is participating (Thomas et al., 2026). These claims are contested and are cited as reports. For both powers, energy security, relations with Gulf states and market stability argue against an uncontrolled war, so both may favour diplomatic arrangements while pursuing their own strategic aims.

11.4 Israel and the Gulf states

Israel regards Iran's nuclear, missile and regional capabilities as grave security threats; the CRS notes

that the last direct Israel–Iran exchange as of September occurred on 7–8 June, with Israel's focus shifting to Lebanon (Thomas et al., 2026). Gulf states face a different dilemma: they depend on US protection yet fear that their territory and energy infrastructure will become targets, as Iranian strikes on GCC states, and the Houthi attacks on Saudi Arabia, have shown (Blanchard & Sharp, n.d.; Thomas et al., 2026). Such divergent threat perceptions are consistent with the idea of the Gulf as a regional security complex whose dynamics cannot be reduced to a bilateral dispute (Buzan & Wæver, 2003), and they strengthen the case for regional confidence-building.

12. Strategic Interests and Foreign Policy Calculations

12.1 US strategic objectives

US aims include preventing an Iranian nuclear weapon, protecting forces and partners, keeping Hormuz open, countering Iranian missile and drone capabilities and, at times, weakening the Islamic Republic itself (Thomas et al., 2026). These aims are pursued through diplomacy, sanctions and military deterrence, but prolonged confrontation may undermine some of them by raising costs, straining resources and prompting further retaliation (Thomas et al., 2026).

12.2 Iranian strategic objectives

Iran's objectives include regime and territorial survival, deterrence of outside intervention, regional influence, protection of its nuclear and technological interests and relief from sanctions. Tehran may regard concessions made without security guarantees as a strategic vulnerability (Thomas et al., 2026). Its readiness to bargain therefore depends not only on economic pressure but also on the credibility and durability of any commitments made by Washington (Kamel, 2024; Walter, 2002).

12.3 Miscalculation and domestic politics

Each government can overestimate its capacity to endure pressure or underestimate the other's political constraints. Washington may expect economic and military pressure to compel concessions; Tehran may expect regional instability and American domestic opposition to force Washington to soften its terms (Jervis, 1976; Nakhoul & Irish, 2026). The CRS notes repeated congressional votes on war powers and appropriations (Thomas et al., 2026), while Reuters links Iranian expectations to the US midterm elections (Nakhoul & Irish, 2026). Leadership legitimacy, prestige and institutional interests make compromise harder and sustain a stalemate in which each side waits for the other to move first.

13. Future Scenarios

The CRS outlines five non-exclusive scenarios (Thomas et al., 2026). They are reinterpreted below through the lens of strategic silence.

13.1 Renewed or expanded military confrontation

Escalation could follow a breakdown in talks, attacks on shipping, strikes on bases or a miscalculation involving partner forces. The CRS identifies possible targets for expanded US action, including the enriched-uranium stockpile, Kharg Island (through which about 90 per cent of Iranian oil exports have passed) and coastal areas near Hormuz, and warns that Iran has matched US escalation step for step (Thomas et al., 2026). Gulf states have reportedly cautioned against renewed bombing for fear of retaliation against their infrastructure (Nakhoul & Irish, 2026).

13.2 Prolonged low-level conflict

A pattern of intermittent strikes, sanctions, maritime pressure and limited diplomacy could persist for as long as each side believes it can outlast the other (Thomas et al., 2026). This scenario most closely matches strategic silence. It is not necessarily stable, because repeated incidents can accumulate and trigger escalation through error.

13.3 Uneasy ceasefire

A ceasefire without a comprehensive agreement could reduce violence while leaving nuclear, sanctions, maritime and regional disputes unresolved. Experience in 2026, when an April truce held for weeks despite the blockade, shows both the value and the fragility of such arrangements (Thomas et al., 2026). Monitoring, communication channels and agreed procedures for alleged violations would be needed to prevent another temporary pause (Fortna, 2003).

13.4 Negotiated settlement

A settlement requires both sides to conclude that compromise is worth more than continued pressure. Elements might include a verified nuclear framework, phased sanctions relief, an end to attacks, maritime confidence-building and dispute-resolution mechanisms. The CRS stresses that viability would depend on shared understanding of each side's obligations and on whether the interests of Gulf states, Israel and Turkey are taken into account (Thomas et al., 2026).

13.5 Regional security framework

A wider framework could cover maritime safety, military communication, crisis management and non-interference. It would not replace bilateral negotiations but could prevent regional incidents from derailing them. Pakistan, Qatar and Oman could contribute to dialogue, with Gulf states and other relevant actors participating in discussions on their security interests (Blanchard & Sharp, n.d.; Buzan & Wæver, 2003). A further scenario considered by the CRS, the collapse of the Iranian government, is outside the scope of this article's argument but would transform every other variable (Thomas et al., 2026).

14. Discussion

The analysis shows that the US–Iran conflict is a multidimensional rivalry and not a conventional bilateral military dispute. Its persistence reflects the interaction of historical grievance, ideological difference, competing security perceptions, nuclear disagreement, economic coercion and regional competition (Abrahamian, 2008; Diehl & Goertz, 2000). The JCPOA shows that breakthroughs are possible, but also that they are vulnerable when not backed by durable domestic consensus and credible implementation mechanisms (Kamel, 2024; Serim, 2022).

The 2026 war demonstrates the limits of military force as a way to resolve political disputes. Strikes can degrade capabilities and alter bargaining positions, but they cannot settle disagreements about sovereignty, nuclear rights, regional influence and security guarantees; the collapse of the MoU illustrates the difference between pausing hostilities and settling a conflict (Thomas et al., 2026). The sanctions dimension reveals a coercion–negotiation paradox: pressure can raise costs but can also stiffen resistance if the target doubts that compliance will bring lasting relief (George, 1991; Kamel, 2024; Pape, 1997).

Hormuz illustrates how geography can confer leverage and how a regional crisis can have global consequences. Attempts to use shipping disruption or maritime restrictions as instruments of coercion can intensify the conflict and harm non-participants (Thomas et al., 2026; U.S. Energy Information Administration, 2025).

The article's main conceptual contribution is the distinction between strategic silence and peace. The record to November 2026 suggests three analytical points. First, silence is mainly a political and diplomatic condition: it is the stalling of dialogue, not the absence of violence, that defines it. Second, coercive instruments do not recede during silence; some, such as sanctions, intensify (Thomas et al., 2026). Third, strategic silence is unstable and oscillating, and in the 2026 case it was repeatedly punctured by renewed fighting (CBS News, 2026; Nakhoul & Irish, 2026). The concept should nonetheless be applied with care. It does not replace established terms such as ceasefire, de-escalation or frozen conflict, and its value lies in directing attention to the gap between lower visible violence and continuing strategic competition. Future work can operationalise it using the indicators in Table 3.

15. Limitations and Directions for Future Research

This article rests on qualitative analysis of academic, institutional and media sources. The 2026 conflict is still unfolding, and information on military operations, nuclear material and negotiations is incomplete or contested. Media reports provide time-specific accounts and should be cross-checked against official statements and independent evidence, and several figures in the CRS report itself derive from press accounts or advocacy monitors. The concept of strategic silence is exploratory and needs further theoretical development and empirical testing, and the coding in Figure 3 is interpretive.

Future research could compare strategic silence in the US–Iran case with other long rivalries, examine how sanctions and maritime restrictions affect bargaining behaviour, and assess whether regional mediators can prevent escalation. A longitudinal dataset recording military incidents, diplomatic contacts, sanctions measures and formal agreements could test whether strategic silence predicts renewed confrontation or eventual settlement.

16. Conclusion

The US–Iran conflict remains one of the most consequential rivalries in contemporary international relations. Its roots lie in the 1953 coup, the 1979 revolution and the breakdown of diplomatic relations, and it has since expanded to include nuclear diplomacy, sanctions, regional alliances, deterrence and maritime security (Abrahamian, 2008; Emery, 2013). The JCPOA showed that negotiated limits were possible, but the 2018 withdrawal and the loss of confidence that followed weakened the diplomatic foundation (Kamel, 2024; Serim, 2022).

The 2026 war brought the rivalry into a more dangerous phase and showed its regional and global reach. The failure of the ceasefire and the June MoU to produce a comprehensive settlement left the central disagreements untouched. As of mid-November 2026, reporting indicates that both sides rely on pressure while disagreeing sharply on the order of concessions (CBS News, 2026; Nakhoul & Irish, 2026; Thomas et al., 2026).

The move from open confrontation to strategic silence must therefore not be read as reconciliation. It marks an unstable phase in which diplomacy stalls while blockade, sanctions, readiness and limited strikes continue. It may reduce the visibility of conflict, but it also preserves the conditions for renewed escalation. A durable settlement requires more than a pause in fighting: verifiable nuclear arrangements, reciprocal security assurances, predictable sanctions relief, protection of navigation, crisis-management mechanisms and sustained regional diplomacy (Fortna, 2003; Thomas et al., 2026). Whether silence becomes a bridge to diplomacy or a prelude to renewed war will depend on whether Washington and Tehran are willing to address the roots of their rivalry through a credible political process.

17. Policy Recommendations

1. **Restore sustained diplomatic engagement.** Maintain direct or mediated channels during military tension, building on the Islamabad, Omani and Qatari tracks used in 2026 (Thomas et al., 2026).
2. **Develop a verifiable nuclear framework.** Specify enrichment limits, IAEA monitoring and reporting, and procedures for resolving compliance disputes, drawing on the experience of the JCPOA and Resolution 2231 (International Atomic Energy Agency, 2025; Serim, 2022; United Nations Security Council, 2015).
3. **Link sanctions relief to measurable, reciprocal steps.** Make relief predictable enough to be credible while preserving snap-back safeguards, and agree a sequencing formula that avoids the deadlock described by Reuters (Fortna, 2003; Nakhoul & Irish, 2026; Rosen & Thomas, n.d.).
4. **Establish maritime confidence-building arrangements.** Agree incident-reporting and deconfliction procedures for shipping and naval forces around Hormuz, and clarify the administration of the Strait that the June

MoU left ambiguous (Thomas et al., 2026; United Nations, 1982).

5. **Create military crisis-management channels.** Provide hotlines and protocols for incidents involving naval forces, aircraft, missiles, drones and regional installations, to reduce the risk of accidental escalation (Glaser, 1997; Jervis, 1976).
6. **Support regional diplomacy.** Involve Pakistan, Qatar, Oman and the Gulf states in dialogue while recognising that the principal parties must own and implement any agreement (Blanchard & Sharp, n.d.; Thomas et al., 2026).
7. **Include regional security concerns in negotiations.** Cover protection of civilian and energy infrastructure and the prevention of attacks by partner forces (Blanchard & Sharp, n.d.; Buzan & Wæver, 2003).
8. **Uphold international humanitarian law.** Ensure protection of civilians and essential civilian objects during any continuing hostilities, and investigate reported civilian-harm incidents transparently (Henckaerts & Doswald-Beck, 2005; Thomas et al., 2026).
9. **Use limited humanitarian and economic confidence-building measures.** Reduce civilian hardship and create political space for broader negotiations (Galtung, 1969; Rosen & Thomas, n.d.).
10. **Launch a longer-term regional dialogue.** Address maritime security, non-interference, crisis prevention and peaceful settlement of disputes (Buzan & Wæver, 2003; Mac Ginty, 2006).

18. Author Contributions

The contributions below follow the CRediT (Contributor Roles Taxonomy) categories.

Author	Contribution
Ayesha	Conceptualisation; methodology; formal analysis; development of the strategic silence framework; visualisation (figures and tables); writing – original draft; project administration; corresponding author.
Sidra	Investigation; theoretical framework and literature review; validation of sources; writing – review and editing.
Tayyaba	Data curation and collection of historical and documentary sources; background research on US–Iran relations; resources; writing – review and editing.

All authors have read and approved the final manuscript.

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