

Policy Compass The Trump Administration's Diplomacy with Iran and Russia By Giorgio Cafiero



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Page | 2

Giorgio Cafiero

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Table of Contents



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Page | 3

Giorgio Cafiero

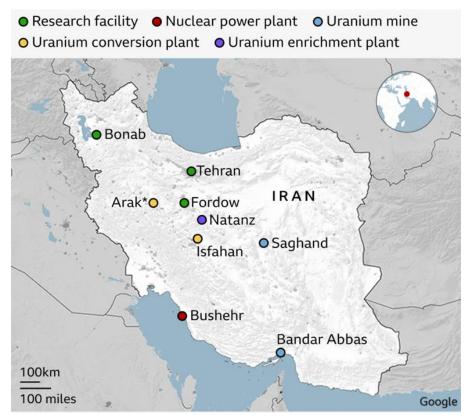
The Trump Administration's Diplomacy with Iran and Russia

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Executive Summary

- Frump's diplomacy with Iran appears to be moving along with more momentum than his administration's dialogue with Russia over Ukraine.
- Both the White House and Iran's Supreme Leader seem to have vested interests in the American-Iranian nuclear talks ending with a 'JCPOA 2.0' being signed.
- Trump and Ayatollah Ali Khamenei have managed to prevent anti-diplomacy voices in Washington and Tehran from derailing US-Iran diplomacy.
- Amid the American-Iranian nuclear talks, the US side has constantly flip-flopped on its red lines for Iran, with the Trump administration's shifting stance on nuclear enrichment being confusing.
- Israel is the only country in the Middle East which opposes the US and Iran engaging in nuclear talks.
- Unlike during the Obama presidency, the Gulf Arab monarchies are supportive of US efforts to negotiate a nuclear accord with the Islamic Republic.
- The Trump administration has not had much luck in terms of negotiating a peace deal with Russia that can end, or at least freeze, the Ukraine conflict, which seems to stem from Moscow's calculation that continued warfare serves Russian interests for the time being.
- The White House believes that a combination of offering carrots (American investment in Russia and new trade deals) and threatening sticks (new sanctions on Moscow) can pull the Kremlin into agreeing to a peace deal in Ukraine.

Key Picture: Nuclear Facilities in Iran



Source: Nuclear Threat Initiative, International Atomic Energy Agency, BBC

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1. Fragile Nuclear Negotiations Between the US and Iran

Since April, the US and Iran have held five rounds of nuclear talks in Muscat and Rome. These negotiations, which have taken place under the Sultanate of Oman's auspices, have yet to produce a breakthrough. Yet, most indicators suggest that there is good reason for cautious optimism about Washington and Tehran reaching a nuclear accord seven years after President Donald J. Trump initially sabotaged the 2015 Joint Comprehensive Plan of Action (JCPOA). Today, the prospects for a 'JCPOA 2.0' seem relatively bright considering that both Trump Page | 4 and Iranian Supreme Leader Ayatollah Ali Khamenei have signaled their determination to resolve the American-Iranian standoff over the Islamic Republic's nuclear program in manners that require both sides to make certain concessions.

The delicate negotiations process remains in a fragile state, requiring careful handling. It is necessary to recognise how anti-diplomacy figures have influence in both Washington and Tehran. There are officials in both countries who oppose American-Iranian talks altogether, framing the other as "evil", not worthy of engaging, and fundamentally untrustworthy. Yet, both Trump and Khamenei, to their credit, have been able to prevent these anti-deal elements in their respective countries from derailing the multiple rounds of talks that began in the Omani capital on 12 April.¹

Although it may seem paradoxical, the very fact that Trump—the president who delegitimised the JCPOA in May 2018—is in the Oval Office bodes well for a 'JCPOA 2.0'. This relates to dynamics within the US political system and, more specifically, the Republican Party. Whereas Republican lawmakers and pundits had long used their influence to undermine any US-Iran dialogue when Democrats were in the White House, it is clear that their unwillingness to excessively challenge Trump on the Iranian nuclear file explains why criticism of his administration's decision to engage Tehran diplomatically from the right-wing end of the American political spectrum has been relatively limited. It is likely safe to assume that a Kamala Harris administration would have had, from a political standpoint, a more difficult time sending envoys to Muscat and Rome to negotiate with the Iranians.

Another factor which bodes well for the US and Iran successfully negotiating a 'JCPOA 2.0' relates to shifts in the foreign policies of some of the Gulf Cooperation Council (GCC) states since the time of the negotiations that led to the original 2015 JCPOA during Barack Obama's presidency. Saudi Arabia, the United Arab Emirates, and Bahrain were at best lukewarm toward the 2015 JCPOA. These three Arab states hailed the Trump administration's decision to sabotage the historic accord and they also lobbied the White House to impose "maximum pressure" on Tehran. Today, however, there is a new environment in the Gulf. These Gulf Arab monarchies are in a state of détente with the Islamic Republic and they aim to deescalate regional tensions and pursue diplomacy with Iran, not war.

All GCC states are concerned about what a regional conflict involving Tehran could mean for their economic development and diversification plans, which require greater peace and stability in the neighbourhood. As much as these GCC states might find certain aspects of a new nuclear deal problematic, there is a consensus among the Gulf Arab leaders that their countries' interests are, on balance, best served by Washington and Tehran entering into a new deal. The last thing that any GCC member wants is for the US-Israel alliance, on one side, and Iran, on the other, to fight a war. This is understandable given that the Gulf Arab monarchies would be on the frontlines of such a conflict.

During Trump's May 2025 Gulf tour, he made stops in Riyadh, Doha, and Abu Dhabi, where Gulf Arab policymakers discussed the Iranian nuclear file with the American president and his accompanying delegation. The message from the US's 45th and 47th president was one of focusing on commercial opportunities as opposed to new conflicts and military interventions led by Washington. Trump used clear language to distance himself from neo-conservative agendas that aligned with Israel in terms of calling for military strikes against Iran.

Put simply, today, with all the GCC states in support of a 'JCPOA 2.0' that Trump wants, there is only one country that opposes the American-Iranian talks: Israel. This contrast to the dynamics that defined US-GCC relations in





the lead up to the first JCPOA's 2015 passage is significant, particularly given how the Saudi, Qatari, and Emirati leaders appear to have influence and some degree of leverage over Trump (as highlighted by his shift on Syria sanctions) who will deal with the Gulf Arab monarchies in highly transactional manners. This is particularly so within the context of the multi-billion-dollar deals that he secured while on his latest Gulf tour.²

One of the primary obstacles lies in the ambiguity surrounding the American position on Iran's right to uranium enrichment. Those following the American side's stances amid these talks with the Iranians have observed much flip-flopping. While Trump has drawn a clear red line at the development of nuclear weapons while his Middle East envoy, Steve Witkoff, has been articulating a "zero-enrichment" red line, there appears to be a lack of internal consensus within the Trump team on the enrichment question. It is also unclear whether the Trump administration seeks to strike simply a nuclear deal or an arrangement that addresses the nuclear issue and non-nuclear issues too such as Iran's support for various armed groups in the Middle East, drones, ballistic missile activities, and so on.

On the Iranian side, Foreign Minister Abbas Araghchi has unequivocally stated that a "zero-enrichment" demand is unacceptable. If the Trump administration is genuinely committed to preventing Iran from acquiring nuclear weapons, Washington will need to push for a 'JCPOA 2.0' that limits Iran's nuclear program, incorporates international inspections, and permits limited enrichment in line with the Nuclear Non-Proliferation Treaty. A diplomatic approach grounded in realistic constraints offers a viable path to a new nuclear agreement. In contrast, insisting on "zero-enrichment" risks foreclosing any meaningful negotiation and severely undermines hope for a 'JCPOA 2.0'.

Ultimately, what truly matters in the ongoing US-Iran nuclear talks in Muscat and Rome is not the public posturing—such as declarations of a "zero-enrichment" stance by American officials—but rather the actual demands being made behind closed doors. Whatever Washington has been requesting from Tehran, it has not prompted the Iranians to withdraw from the negotiations. This alone suggests that the US position remains somewhat flexible and that the Trump administration is not insisting on a total ban on uranium enrichment as a precondition for a new agreement.⁴

Given this context, it is reasonable to conclude that these nuclear negotiations are, on the whole, constructive and progressing in a healthy direction. With both sides having clear incentives to reach a new deal, the momentum seems to be behind continued diplomatic engagement in Trump's second term. Still, the decisive factor will be the substance of Washington's demands and what the Trump team is actually asking of Tehran.

2. Israeli Opposition to Diplomacy with Iran

The Trump administration's decision to enter into nuclear talks with Iran has unsettled Israel, which would prefer to wage military strikes against the Islamic Republic's nuclear facilities over witnessing Washington and Tehran reach a new nuclear accord that permits Iran to enrich uranium.

Israel's longstanding concern over Iran's nuclear ambitions—particularly under Prime Minister Benjamin Netanyahu's leadership—has led to repeated signals of a willingness to take military action against Iranian nuclear facilities. Netanyahu's current government, composed of right-wing and ultra-nationalist elements, has Tel Aviv deeply involved in a range of regional military operations, including in Yemen, Syria, Lebanon, and the occupied Palestinian territories. The ongoing war in Gaza, marked by devastating humanitarian consequences, has drawn widespread international scrutiny and condemnation.

In this context, reports of a potential Israeli strike on Iran should not be dismissed lightly. The absence of clear constraints on Israel's military actions raises the risk of escalation. Should the Trump administration wish to avoid the outbreak of a broader conflict—one that could entangle the US and destabilise key economic and political initiatives among its regional partners—it would be prudent to exert diplomatic and strategic leverage to prevent further escalation.





Although Israel's leadership may have its own motivations for considering a military strike on Iran, there are compelling reasons to believe such action remains unlikely in the near term. A key factor is the mutual deterrence that currently defines the Israeli-Iranian relationship—a precarious balance of power in which both sides recognise the high costs of direct confrontation. Despite public rhetoric and media speculation, Israeli military leaders are likely aware that Iran retains significant military capabilities and could inflict substantial damage in the event of a large-scale conflict. This is so even in the wake of a sustained Israeli offensive.

Page | 6

For instance, the Houthis remain capable of imposing serious consequences on Israel in response to its ongoing military campaign in Gaza and operations targeting Ansar Allah in Sana'a and other parts of Yemen. While the Houthis cannot rival Israel's military power, even limited successes—such as striking Tel Aviv's Ben Gurion Airport once a month—could deal a significant blow to Israel's commercial and tourism sectors. Beyond Yemen and the Houthi movement, other members of the so-called "Axis of Resistance" possess the capacity to adapt and regroup.

It would therefore be both naïve and premature to view the setbacks experienced by the Iran-aligned coalition in 2024 as establishing a lasting equilibrium in the Middle East's security architecture. Furthermore, Iran itself views the blows it suffered amid the 2023-24 Israel-Hezbollah war and the fall of Syria's Ba'athist regime in December 2024 as temporary, believing that Iran's history of being relatively strong versus weak in the region is one of ups-and-downs.⁶

Reports suggesting imminent Israeli military action against Iranian nuclear sites may serve certain purposes. They could be intended to apply psychological or diplomatic pressure on Tehran ahead of potential negotiations or reflect Netanyahu's long-standing interest in broadening the scope of the Gaza conflict. Such interests could stem from the Israeli prime minister's desire to divert global scrutiny from the genocide and mass starvation in Gaza, which have greatly contributed to Israel's shift toward pariah status in much of the international community's eyes. Regardless of the underlying motivations, the dynamics at play suggest that, at least for now, strategic caution stands a good chance of prevailing over open confrontation.

3. Russia's influence in American-Iranian Nuclear Diplomacy

As an original signatory of the JCPOA, Russia regards the ongoing nuclear talks between the United States and Iran as a positive and reassuring development.⁷ Moscow is eager to contribute meaningfully to international efforts aimed at bringing about a 'JCPOA 2.0.' Given its close partnership with Tehran, Russia has a vested interest in ensuring that the current nuclear standoff does not escalate into military action by the United States or Israel against Iranian nuclear facilities.

Such a scenario would not only risk plunging the region into deeper instability but could also undermine Russia's strategic position in the Middle East—something the Kremlin is determined to avoid. A military strike by Washington or Tel Aviv would likely trigger broader regional turmoil, including areas near Russia's southern frontier, compounding Moscow's security concerns.

Moreover, an attack could significantly weaken Iran's influence in the region, and, under that scenario, Moscow might come under pressure to more openly support Tehran, which could likely complicate Russia's efforts to maintain a carefully calibrated geopolitical balance in the Middle East. Conversely, a successful outcome to the U.S.-Iranian negotiations could foster greater regional stability, aligning with Russia's broader strategic objectives.

With the Trump administration and Iran engaging in dialogue under Omani auspices, the Kremlin may see an opportunity to position itself as a facilitator of this diplomatic process. Such a role could carry broader geopolitical implications, including for the ongoing conflict in Ukraine. In essence, by helping facilitate a nuclear deal between Washington and Tehran, Russia might secure valuable diplomatic leverage in its negotiations with Washington over Ukraine.





4. Ukraine Peace Talks

When Trump began his second term in January, there was widespread speculation that, of the two major foreign policy goals he outlined during his campaign—brokering a nuclear deal with Iran and resolving the war in Ukraine—it was the conflict in Eastern Europe where he was more likely to achieve a significant diplomatic breakthrough. In contrast, reaching an agreement with Iran on its nuclear program was seen as a long shot. Yet, just over four months into his second term, the reverse now seems more plausible: negotiations with Iran are Page | 7 showing signs of progress, while efforts to advance Ukraine peace talks appear to be stalling, at least for the time being.

On 19 May, Trump and Russian President Vladimir Putin held a two-hour phone call. Following the conversation, Trump announced that Moscow and Kyiv would "immediately start negotiations" toward a ceasefire and an end to the conflict. He emphasised, however, that the terms of peace "will be negotiated between the two parties, as it can only be," and noted that the Vatican had shown interest in hosting the talks. 8 Shortly before the call, Vice President JD Vance had told reporters that Washington might bring an end to its shuttle diplomacy between Russia and Ukraine.9

Yet on 25 May, Trump expressed dissatisfaction with Putin in light of Russia's intensified military campaign. In what became the war's most extensive aerial assault to date, Russia launched 367 drones and missiles targeting Kyiv and other Ukrainian cities, resulting in 12 deaths and dozens of injuries.¹⁰ In response, Trump suggested that additional sanctions against Russia were under consideration as punishment for the escalation. 11

The lack of meaningful progress in the peace process appears to reflect Moscow's current unwillingness to offer significant concessions to Kyiv or its Western allies—at least for now. Russia continues to put forward maximalist demands and shows no sense of urgency in efforts aimed at ending the war. The Kremlin seems to believe that continued military engagement will yield greater strategic rewards than negotiating at this stage. Putin may also see an opportunity to strike a broader deal with Trump to reset US-Russia relations, potentially excluding a resolution to the Ukraine conflict from such an arrangement.

Despite the challenges clouding the prospect of an immediate agreement to end or freeze the war, both Kyiv and Moscow appear committed to continuing negotiations in some form. Whether Russia will elevate these talks to the level of senior officials remains uncertain. For now, it seems likely that the lower-level delegation that recently met with Ukrainian counterparts in Istanbul will continue to represent Moscow in forthcoming discussions. But if a higher-level delegation represents Russia in the next meeting, that could possibly signal more seriousness on Moscow's part in terms of winding down this conflict through diplomacy.

Trump appears confident that his dual approach—leveraging the threat of additional sanctions as a form of pressure, while offering potential American investment and new trade agreements as incentives—can persuade the Kremlin to agree to a peace settlement. Whether this strategy will yield the outcome the White House envisions remains to be seen. For now, a lasting peace in Ukraine continues to look uncertain and may remain out of reach for the foreseeable future.





Page | 8

NOTES

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