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The Nuclear Talks Between the United States and Iran—Chances for Reaching an Agreement and Implications for Israel

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The nuclear discussions between Iran and the United States are continuing, with both sides expressing a preference for an agreement over military confrontation—even though, at this stage, it is impossible to assess whether they will succeed in bridging existing gaps or those that may arise later. For now, both parties have expressed optimism and appear to believe that there is value in deepening the talks. The meeting that was supposed to take place on May 3 will likely be held in the coming days. According to President Trump, who attaches great importance to reaching an agreement, the purpose of the talks is to prevent Iran from obtaining nuclear weapons. However, within the administration, there is a debate on how to achieve this goal—between those who demand the dismantling of Iran's nuclear program and those who accept Iran's position that it has the right to enrich uranium and are willing to negotiate on that basis.

From its perspective, Israel appears to be sidelined in these talks. Despite Israel's position advocating for the application of the "Libyan model" to Iran—i.e., the complete dismantling of the nuclear program—American conduct so far indicates a more conciliatory approach. Therefore, it is important that the dialogue between Jerusalem and Washington continues not only at the senior political level but also includes direct meetings between working groups that can influence the emerging agreement's framework—particularly with regard to the future of nuclear infrastructure left in Iran's hands, the scope of oversight, and the agreement's expiration terms. Any Israeli move perceived as an attempt to sabotage the agreement will be taken seriously and could affect strategically important issues for Israel—those related to the Iranian nuclear challenge and others.

The talks between the United States and Iran, aimed at formulating a nuclear agreement, continue. These discussions are taking place both at the senior level—with Iranian Foreign Minister Abbas Araghchi and President Trump's envoy, Steve Witkoff, reportedly meeting directly (with the Omani foreign minister present), as initially proposed by Trump—and at the working level. In general, both American and Iranian spokespeople have referred positively to the discussions, expressing cautious optimism about the prospects of reaching an agreement. Both sides appear to agree on a basic foundation that enables continued dialogue. While the parties have revealed little about the substance, leaked reports and the planned (but canceled) speech by Foreign Minister Araghchi at the Carnegie Endowment for International Peace's recent conference in the United States (he declined to take questions) suggest the current focus is primarily on the following issues:

Scope and Level of Uranium Enrichment in Iran. It appears that the Trump administration has, in principle, accepted the notion—first adopted during the Obama era—that Iran has the right to enrich uranium. Iran, for its part, is unwilling to give up that right. While the administration continues to present alternative ideas to prevent enrichment within Iran, assuming it does not intend to impose a different position, the discussion has now shifted to the level of enrichment, its scope, and the amount of enriched material Iran is allowed to possess at any given time. The 2015 nuclear agreement (JCPOA) allowed Iran to hold only 300 kg of uranium enriched to 3.67%. Unlike the negotiations conducted under the Biden administration (2021–2022), this time the Iranians are not demanding a return to the JCPOA. Instead, they are seeking a "new agreement" that does not adhere to previous parameters. In his prepared speech, Araghchi noted that he assumes even Trump—who withdrew from the original agreement in 2018—does not wish to return to it. In any case, even if both sides wanted to revert to the original agreement, it is no longer relevant—mainly due to Iran's significant progress in advanced centrifuge technology (involving thousands of units), which it is unlikely to dismantle. The guiding parameter of the previous agreement was maintaining a "breakout time" of one year for developing a bomb—an objective now almost impossible to meet due to Iran's significant technological advances in recent years.

Duration of the Agreement. The new agreement will need to bridge Iran's desire for a fixed, limited term—after which it would be allowed to resume large-scale enrichment—with Trump's preference for a long-term or even permanent agreement.

Oversight of the Nuclear Program. Since the US withdrawal from the agreement, the International Atomic Energy Agency's (IAEA) ability to monitor Iran's nuclear developments has been severely damaged. Over the past three years, most of the IAEA's cameras have not been providing data on enrichment processes, uranium mining, or centrifuge construction. Iran is also not implementing the IAEA's Additional Protocol on its territory, which obligates states to provide a wide range of information to the agency, extends inspectors' access rights, and allows the use of specific technologies for verification. It is likely that if a new agreement is signed and Iran resumes cooperation with the agency, the IAEA will need to invest considerable resources to close the gaps that accumulated over the years when Iran restricted access to critical information. This is in addition to longstanding unresolved questions about undeclared sites where uranium particles were discovered—questions that Tehran still refuses to answer.

IAEA Director General Rafael Grossi continues to warn about the significant progress of Iran's nuclear program. He has reiterated that a country without nuclear weapons does not enrich uranium to 60%, and he has emphasized the agency's readiness to provide any assistance to promote an agreement—based on the agency's responsibilities and authorities. At the same time, as talks continue, Grossi has made visits to Tehran, Washington, and Paris, but has not actually participated in the rounds of talks that have taken place. It is worth recalling that before the US withdrawal from the original nuclear agreement, Iran cooperated with the agency and met its commitments under the agreement. It now appears that Iran has no issue committing to a "comprehensive monitoring and verification plan to ensure the peaceful nature of the nuclear program."

Guarantees. Following the precedent set by Trump's withdrawal from the nuclear agreement during his previous term, the Iranians are seeking to anchor any new agreement, once reached, with strict guarantees, including approval by the US Congress or, alternatively, by keeping the highly enriched uranium under their possession or Russia's, so that the uranium would return to Iran if there is another American breach of the agreement. This is not a key issue at this stage, but in previous talks with the Biden administration, disagreement on this matter contributed to their failure.

Economic Concessions to Iran. Two issues were presented in this context: the first, and most important to Iran, is the removal of most of the American sanctions imposed on Iran following Trump's withdrawal from the agreement and in the years since. The second, as presented in the speech Araghchi planned to deliver at the Carnegie conference, addresses for the first time the possibility of economic cooperation between the countries. The Iranians understand the economic interests emphasized in all of President Trump's policy steps, and therefore the Iranian foreign minister stated that Iran has never blocked economic and scientific cooperation with the United States and pointed to "the trillion-dollar opportunity that our economy presents may be open to U.S. enterprises. This includes companies which can help us generate clean electricity from non-hydrocarbon sources." He also emphasized that "Iran currently operates one reactor at the Bushehr Nuclear Power Plant. Our longstanding game plan is to build at least 19 more reactors, meaning that tens of billions of dollars in potential contracts are up for grabs." According to him, "the Iranian market alone is big enough to revitalize the struggling nuclear industry in the United States."

Although various reports mention that the parties are exchanging drafts, it is not clear whether the goal is to reach a comprehensive agreement or to promote a general framework agreement without all the details being finalized. Working-level discussions have already begun, but it is likely that a detailed agreement will require going into specifics—which, by nature, will take time. The American working-level team, comprising about 12 members, is headed by Michael Anton, who serves as director of the Policy Planning Staff at the US State Department (and previously held various roles in the Trump administration and prior Republican administrations). Although Anton lacks technological knowledge, it can be assumed that professionals are working alongside him. (In the past, during the JCPOA negotiations, the responsibility for technological discussions was assigned to Secretary of Energy Ernest Moniz, a professor of nuclear physics.)

From all the reports and positive statements coming from Iran—including comments highlighting that the negotiations are progressing beyond expectations and that the Iranian side was surprised by the seriousness of the United States and the absence of "unreasonable demands"—it can be assumed that, alongside the willingness to allow enrichment capabilities to remain in Iran, the talks are also not dealing with Iran's missile program or its regional activities.

Furthermore, it appears that the choice of Steve Witkoff—a moderate Trump loyalist who lacks experience—reflects Trump's decision, at least for now, to balance between the hawkish camp and the isolationist camp. The hawks—led by Secretary of State Marco Rubio and former

National Security Advisor Mike Waltz (who was dismissed, according to the Washington Post, due to his hardline positions on Iran and talks he held with Prime Minister Netanyahu about the possibility of a strike on Iran)—believe that only a credible military threat can lead to a strict nuclear agreement with Iran. They contend that Iran must be prevented from developing nuclear weapons under any circumstances. In their view, this requires the complete dismantling of Iran's nuclear program (the "Libyan model") and Iran's agreement to adopt an approach similar to that of the United Arab Emirates, which has nuclear power reactors but lacks enrichment capability and imports its nuclear fuel from abroad. In contrast, the isolationists—led by Vice President J. D. Vance, Director of National Intelligence Tulsi Gabbard, and especially conservative talk-show host Tucker Carlson, a close ally of Trump—advocate for withdrawal and non-intervention and are strongly critical of military action, particularly against Iran. For now, it appears that even the position aligned with Netanyahu's public stance—that the "Libyan model" should be applied to Iran—is not being put forward as a formal demand in the ongoing talks.

Iran's Supreme Leader Ali Khamenei—who for years opposed talks with the United States—continues to emphasize the need to remain wary of Trump's intentions. However, his decision to permit the talks reflects Iran's current hardship—among the worst the country has ever experienced. On the security-strategic level, the resistance front, once a central pillar of Iran's deterrence against Israel, has collapsed following the defeat suffered by its proxy organizations in the Middle East—primarily Hezbollah and Hamas. The Assad regime in Syria has fallen, while Iran-backed militias in Iraq and the Houthis in Yemen have been significantly weakened. At the same time, for the first time since the end of the Iran–Iraq War, Iran has endured a direct attack on its territory (an Israeli response to a prior strike on Israel, which had been authorized by Khamenei). As a result, Iran now feels more vulnerable than ever to another Israeli strike. Furthermore, Iran's economic crisis is deepening—the currency's value has hit an all-time low, the state cannot supply residents with sufficient electricity, and people in some parts of Iran are abandoning their homes due to water shortages. All this, alongside Trump's presidential victory, has shifted Tehran's strategic calculations. A deal with Washington would therefore serve both economic needs and—above all—the need to avert a military strike.

Within Iran, there is growing recognition that Trump's threats to use force should not be underestimated—particularly the possibility that he might give Israel a "green light" to attack, as he suggested during a joint press conference with Prime Minister Netanyahu on his first visit to Washington. The deployment of additional US forces in the region—including a second aircraft carrier, B-2 bombers stationed in Diego Garcia in the Indian Ocean, and two early warning and control planes in Saudi Arabia—reinforces this perception. Iranian fears were also heightened by a *New York Times* leak revealing that Washington had blocked an Israeli strike on Iran that had been planned for May.

All these considerations—along with direct pressure exerted by President Trump on Tehran, including a personal letter to the Supreme Leader—have paved the way for the meetings that have already taken place and those still to come. The Iranians have learned how to handle Trump and are using language they believe will persuade him to stay the course toward an

agreement, despite internal and external pressure urging him to seize the moment and launch a military strike against Iran. Trump, who has often portrayed himself as capable of quickly securing a "good" deal with Iran, needs such an achievement, especially given the difficulty of advancing other diplomatic goals, such as securing the release of the Israeli hostages held by Hamas and brokering a ceasefire agreement between Russia and Ukraine.

The negotiations are being managed under tight deadlines. On one hand, President Trump has allotted two months for the talks. On the other, there is the looming timeline for invoking the "snapback" clause—that is, the reimposition of UN Security Council sanctions by Germany, Britain, and France (the E3) if no agreement is reached. Tehran's negotiations with Washington are partly intended to prevent this scenario, alongside parallel talks with the E3 and threats of retaliatory measures, including enriching uranium to weapons-grade levels of 90% or more and/or leaving the Nuclear Non-Proliferation Treaty (NPT). Decisions will need to be made soon to allow enough time for the Security Council to act, should the "snapback" mechanism be triggered. Meanwhile, the Iranians are keeping Russia and China informed of the developments, both to secure their support and potentially involve them in the agreement if one is reached.

Although it seems both Iran and the United States prefer an agreement over military confrontation, it remains uncertain whether they can bridge the existing gaps and those that may emerge later. President Trump continues to invoke the military alternative if the talks fail, even telling *Time* magazine in an interview that "if we don't make a deal, I'll be leading the pack" in a strike on Iran. Nonetheless, his frequent declarations of optimism about reaching a deal speak volumes about his priorities regarding Iran.

Implications for Israel

Israel appears to be on the sidelines of these developments. The very decision to open negotiations was communicated to Prime Minister Netanyahu during a hastily arranged visit to Washington. Minister Ron Dermer, on behalf of Netanyahu, traveled to Paris to meet with US envoy Witkoff before the talks began and later stayed in Rome in an effort to stay informed. A phone call between President Trump and Prime Minister Netanyahu—during which the Iran issue was raised—may have also been intended to "reassure" Israel, as did the White House's statement after the call, which asserted that "the two sides are fully coordinated."

Still, it remains unclear how much influence Israeli professionals will have on the course of the negotiations. Past experience has shown that the main substance of such agreements lies in the details, not in the strategic framework set by negotiators such as Witkoff and Araghchi. Despite Israel's position—that the "Libyan model" should be applied to Iran's nuclear program—the current diplomatic momentum appears to be heading in a different direction. Therefore, it is important for Israel to be familiar with the details in order to better influence the outcome of the negotiations. This urgency underscores the need for the Israel–US dialogue to continue without delay, which should include working groups capable of influencing the emerging framework, particularly regarding the nuclear infrastructure that Iran will be permitted to retain and the mechanisms of future oversight.

Both diplomatically and in terms of public messaging, Israel faces challenges with President Trump's pursuit of an agreement with Iran. However, it is important that Israel refrain from leveraging "friends" in Congress or the administration in ways that may be perceived by the president as direct opposition. Any such Israeli attempt could be interpreted by the Trump administration as an intentional move to undermine the prospect of an agreement with Iran and could have immediate, adverse consequences for strategic Israel–US relations—as illustrated by the publicly cited reasons for Mike Waltz's dismissal. Therefore, and more so than in the past, discreet dialogue between Israel and the United States, at all levels, is of paramount importance.

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