

Stalemate: the fragile ceasefire between the US and Iran

Krzysztof Strachota, Andrzej Kohut

On 7 April, a ceasefire between the US and Israel on one side and Iran on the other entered into force; on 5 May, US Secretary of State Marco Rubio announced the end of Operation Epic Fury. Although full-scale hostilities have ceased, tensions remain high. Iran and the US have significantly restricted traffic through the Strait of Hormuz, with US forces enforcing a blockade of Iranian ports. Both sides have regularly intercepted and diverted vessels, while Iran has launched attacks and engaged in clashes with US forces amid American efforts to reopen the shipping route. Moreover, Iran has occasionally carried out air strikes against the Gulf states, mainly the United Arab Emirates.

As part of the ceasefire, the US and Iran have held a single round of direct talks, while further negotiations have taken place through intermediaries, primarily Pakistan. The discussions have focused on the conditions for reopening the Strait of Hormuz, the future of Iran's nuclear programme and Tehran's regional policy, including support for pro-Iranian forces in Lebanon, Iraq and Yemen. However, both sides have stuck to their conflicting and uncompromising positions. On 10 May, Iran rejected another US draft memorandum concerning de-escalation.

The current situation appears to suit both sides. A return to open conflict would be both costly and risky, while reaching an agreement remains extremely difficult and time-consuming given the fundamental differences in strategic interests. Both sides also appear to believe that time is working in their favour and will eventually force the other to make concessions. Protracted negotiations, sharp rhetoric, transit restrictions, pressure tactics and recurring incidents mean that the conflict could escalate once again in the future.

Maintaining the ceasefire

Washington seeks to avoid a return to full-scale confrontation and is pursuing a diplomatic resolution to the conflict. In order to sustain the narrative that the confrontation with Iran has been a success, President Donald Trump requires two conditions to be met. First, transit through the Strait of Hormuz must resume. Second, Iran would need to make concessions regarding its nuclear programme, including at least a decade-long moratorium on uranium enrichment and the possible transfer of its stockpile of enriched uranium abroad. In return, Washington would most likely be prepared to gradually ease the sanctions imposed on Iran.

Recognising that the closure of the Strait of Hormuz has given Iran a sense of leverage in the negotiations, the United States is now seeking to offset this advantage. This is the intended purpose of the US blockade of Iranian ports, which has increased economic pressure on Iran and could force it to reduce oil production, as maritime oil exports are now

blocked and the country's domestic storage capacity remains limited. Washington hopes that this will weaken Tehran's resolve, as a reduction in production would have long-term consequences for the Iranian oil sector.

The US is also seeking to undermine Iran's blockade of the Strait of Hormuz by demonstrating its ineffectiveness and highlighting Tehran's reluctance to engage in direct confrontation. Operation Project Freedom, which has currently been suspended, was intended to serve this purpose. At the same time, Trump is maintaining the threat of a return to full-scale hostilities, suggesting that the US will resume its air campaign if an agreement with Iran is not reached before his visit to China.

The final element of the current US strategy towards Iran involves further attempts to draw allies into the conflict, including into Operation Project Freedom, and to shift part of the responsibility onto them and even onto international organisations. Rubio has suggested that the UN should become involved in efforts aimed at reopening the Strait of Hormuz.

The US operation: public opinion and Congress

The war against Iran remains unpopular among the American public, with only 38% supporting US involvement in the conflict. The Trump administration must contend with voters' fears of another endless war in the Middle East. The intervention in Iran has also exposed significant divisions among commentators and influencers within the president's support base. High fuel prices have become a major problem in the US, as petrol has surged by an average of around 50% since late February, while the outlook for the availability of aviation fuel remains uncertain. Trump's approval rating has fallen to its lowest level of his second term, reaching 39%. Concerns are also growing regarding the cost of the war. According to a recent Pentagon statement, the United States has spent \$25 billion on the conflict so far, although significantly higher estimates have also emerged, ranging from \$1 billion to \$2 billion for each day of fighting. In an effort to reassure the public, Trump has sought to downplay the situation, arguing that the war has effectively ended. In his recent remarks, he has used terms such as 'mini-war' and 'skirmish'.

The Trump administration is also seeking to avoid difficulties in Congress. 1 May marked the expiry of the 60-day period during which the US Armed Forces may be engaged in a conflict without congressional authorisation under the War Powers Act. On the one hand, the White House argues that the legislation is unconstitutional. On the other, it has announced the end of the military operation and characterised the follow-on mission, Project Freedom, as exclusively humanitarian in nature. Its stated aim is to assist tens of thousands of sailors stranded aboard vessels in the Persian Gulf while awaiting the reopening of the Strait of Hormuz. The administration wants to avoid a congressional vote on continuing the US operation against Iran, as this could deepen divisions within the Republican Party. For some politicians, a vote in favour of the war would become a political burden ahead of the autumn elections.

Iran and the war

From Tehran's perspective, its defensive war against the US and Israel represents a relative strategic success. Not only has the country avoided military defeat or internal collapse so far, but it has also succeeded in shifting the conflict to its preferred theatre, namely the Persian Gulf and the Strait of Hormuz, strengthening its deterrence capabilities, including

the ability to blockade the strait, and negotiating from a position of strength. Preserving the status quo remains Iran's primary strategic objective, but its goals also include obtaining US guarantees against the future use of force, normalising relations on favourable terms – notably through the release of frozen financial assets and the lifting of sanctions – and durably strengthening Iran's strategic position by establishing de facto control over the Strait of Hormuz, including the authority to levy transit fees and block the route. Tehran is demanding that vessels transit the strait exclusively through the Iranian-designated shipping lane, subject to prior notification and the payment of fees, while reserving the right to deny passage to states regarded as hostile. Moreover, Iran has officially rejected demands that it abandons its nuclear programme altogether, while contesting proposals concerning the duration of any suspension of nuclear activities and the possible transfer of its existing stockpile of enriched uranium abroad.

The key assumptions underpinning Iran's strategy include confidence in its own resilience, the belief that time is working in its favour and a readiness to engage in limited escalation. Tehran has pursued this policy despite the United States' clear political and military superiority and an extremely difficult domestic situation further aggravated by the war.

At this stage, Iran appears to be pursuing three main objectives: maintaining its ability to enforce its blockade of the Strait of Hormuz, strengthening its negotiating position vis-à-vis the United States and minimising the domestic costs associated with US operations in the Persian Gulf and the Strait of Hormuz.

Iran is currently signalling its readiness to re-engage in armed conflict – an extremely risky scenario for both Tehran and Washington. Beyond the harsh rhetoric of Iranian officials warning of possible escalation, the plausibility of this scenario is reinforced by attacks on the US Navy, air strikes targeting the Gulf states, primarily the UAE, and reports from Middle Eastern countries concerning the heightened activity of Iranian sabotage cells. These actions are intended to pressure the US into softening its negotiating position.

On the diplomatic front, the situation remains consistent with patterns observed in recent weeks: there are no direct bilateral talks, intensive consultations with countries such as Russia, China and Pakistan are ongoing, and Tehran continues to publicly distance itself from Washington's stated demands.

Political, social and economic consequences for Iran

Despite the resilience it has projected, Iran's situation remains precarious. The war has compounded and exacerbated the country's existing economic, social and political crisis. Estimates indicate losses of at least \$145 billion as a result of the conflict, a 10% contraction in GDP and rising unemployment and inflation. The US blockade of Iranian ports, implemented alongside regularly updated sanctions, has effectively halted Iranian oil exports and maritime trade. The challenge extends beyond the loss of oil revenues: Iran now faces the prospect of a prolonged shutdown of its oil fields. Emerging alternative transit routes – including through Pakistani ports, the Caspian Sea and Central Asian rail networks – may mitigate the effects of the blockade, but cannot eliminate them entirely. At the same time, however, Iran appears capable of functioning under the current constraints over the coming weeks and months.

Internal stability remains the key issue. The war, the elimination of senior Iranian political and military figures, the mounting costs and the existential stakes of the conflict have led to serious tensions and systemic strains. At the same time, the state apparatus and the elites have maintained cohesion; paradoxically, Iranian politics has become more centralised and securitised, with the Islamic Revolutionary Guard Corps (IRGC) consolidating its dominant position. The crisis facing the country has not produced a political force capable of challenging the current policy direction. Similarly, the regime has managed to suppress social tensions – the scale of which was demonstrated by the protests brutally crushed last January – by tightening security measures on an unprecedented scale and signalling its readiness to crack down ruthlessly on any resistance. Despite the severity of the crisis and the absence of any prospect for improvement, major internal upheaval in Iran appears unlikely in the short term.

Outlook

Washington hopes that a combination of economic pressure, efforts to undermine Iran's dominance in the Strait of Hormuz and the threat of resuming full-scale military operations will compel Tehran to make concessions. In the short term, US objectives include keeping the conflict at a low level of intensity, strengthening its negotiating position and reopening the Strait of Hormuz. Washington also aims to shift at least part of the responsibility for ensuring freedom of navigation along the route onto its allies and partners in order to ease the burden on the US armed forces and reduce the associated costs.

In the near term, Iran's policy will focus on projecting resilience, maintaining and expanding its deterrence capabilities, raising the costs for its adversaries and engaging in brinkmanship. From Tehran's perspective, this approach has proven both effective and indispensable. Moreover, time remains an important factor – and the Iranian leadership is convinced that it is working in its favour.

Iran appears open to negotiations, gradual de-escalation and concessions, including on the partial reopening of the Strait of Hormuz and nuclear-related issues, but a comprehensive and binding agreement with the United States remains unrealistic at present. Key obstacles include fundamental differences in expectations and strategic interests, deep mutual distrust and the regional dimension of the crisis – which remains absent from the ongoing negotiations – including the actions of Israel and pro-Iranian forces across the region. Iran appears to operate on the assumption that the current tensions are giving it greater room for manoeuvre and will ultimately force Washington to accept a fragile stability and, by extension, Iran's entrenched position in the region. Should this scenario materialise, the Iranian leadership would be able to confront the country's social, economic and political crisis from a position of strength. At the same time, however, the risk of escalation in the coming weeks remains high, while the prospects for stabilising the Gulf region appear limited.