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<https://www.stt.aegean.gr/geopolab/GEOPOL%20PROFILE.htm>
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https://www.researchgate.net/publication/373776116_GEOPOL_PROFILE_Sept_2023

MIDDLE EAST BULLETIN ON IRAN

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Editors' CV in appendix 1 [22]



An art, which has an aim to achieve the beauty,
 is called a philosophy or in the absolute sense
 it is named wisdom.

SPECIAL REPORT

The Geopolitics of Iran and the North-South Transport Corridor

May 2025

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Preface

GREEK AND IRANIAN PHILOSOPHICAL ENCOUNTERS From Plato to al-Farabi

Christos Kitsos

One of the most important Persian polymath is **al-Farabi** (*Abū Naṣr Muḥammad al-Fārābī* (870 - 950) who is recognized as the "*Father of Islamic Neoplatonism*", Fakhry (2002) among others. He focused his work on the through the nature of a **First Cause**, the first uncaused cause, according to Aristotle.

He created an early Islamic philosophy, roughly speaking trying to have no relation in his development neither to Plato nor to Aristotle, but rather tried to gather together, to join both, as in his fundamental book *Harmonization of the Opinion of the Two Sage*. At the same time he can be considered as a music theorist, Fakhry (2002), in the same line of thought of Pythagoras, Kitsos (2025). He worked hard as the founder of his own school of Islamic philosophy. His works incorporate Astronomy, Logic, Mathematics- working on Euclid's "Elements", Shamsi (1984) - as well as to Cosmology and Physics.

Those who kneel before Plato or Aristotle, kneel also before al-Farabi. The greatness of the evolution and connection of Knowledge in the Cosmos.

Fakhry, M. (2002). *Fārābī, Founder of Islamic Neoplatonism: His Life, Works, and Influence*. Great Islamic Thinkers. Oxford: Oneworld.

Kitsos, C. P. (2025). *The Geometry of Greeks – The Dawn of Sciences*. Lab Lambert Acad. Pub.

Shamsi, F. A. (1984). "Farabi's Treatise on Certain Obscurities in Books I and V of Euclid's Elements". *Journal for the History of Arabic Science*. **VIII** (1–2): 31–42.

1. FIVE KEY FACTORS SHAPING IRAN'S FOREIGN POLICY CALCULUS

Alex Vatanka, Middle East Institute (MEI), 1 May 2025

<https://www.mei.edu/publications/5-key-factors-shaping-irans-foreign-policy-calculus>

Extracts

Iran appears to be reorienting its approach to diplomatic engagement with its neighbors and the West by prioritizing the economic benefits of cooperation. While Iran's overtures to the US, Saudi Arabia, Russia, and China bear watching, they may signify pragmatic moves in the expectation of short-term benefit rather than deeper ideological changes in posture. Domestic political and economic pressures are more likely to force Iran to reassess its confrontational approach to relations with neighbors and global powers. A possible withdrawal of support for the Houthis is the latest significant potential outcome of Iran's shifting stance. The following are five factors to watch for as a Tehran under duress reformulates its policies.

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Iran's foreign policy at a crossroads: Challenges and opportunities

Over the next five years, Iran's foreign policy will face two interconnected challenges: surviving economic stagnation and rolling back the dominance of hardline ideologues. Critics within Iran argue that hardline foreign policy analysts, lacking global experience and nuanced understanding, have steered the country into strategic isolation. Their reliance on religious rhetoric and anti-Western slogans has alienated Iran from the international system, especially as Persian Gulf rivals like Saudi Arabia surge ahead through pragmatic, trade-focused diplomacy.

Economically, Iran is grappling with its weakest position since the Iran-Iraq war, assailed by failing financial systems, environmental crises, and pervasive public mistrust. This severely limits Tehran's capacity to leverage foreign policy for economic recovery. Without reform, the regime lacks the social capital and public confidence to undertake large-scale economic projects, while entrenched interest groups resist changes that could benefit the broader population.

Yet, there are opportunities. Engagement with the US over a potential nuclear deal could offer sanctions relief and open avenues for economic growth if pragmatists regain influence. Recognizing that Iran's economic woes are tied to its confrontational foreign policy, moderates are pushing for a shift toward diplomacy and global integration. Ultimately, Iran's greatest opportunity lies in abandoning ideological rigidity and embracing economic pragmatism, but this depends on overcoming entrenched hardline dominance.

2. IRAN-U.S. RELATIONS: FROM ESCALATION TO DIALOGUE?

Lana Rawandi-Fadai, Russian International Affairs Council (RIAC), 30 April 2025

<https://russiancouncil.ru/en/analytics-and-comments/analytics/iran-u-s-relations-from-escalation-to-dialogue/>

Extracts

From war threats to negotiations

In the early months of 2025, Iran and the United States stood on the brink of open military conflict. The escalation was driven by several factors that coincided in time, heightening the effect of instability. It was one of the most dangerous periods in the history of their relations. Until very recently, Iran lived under a cloud of anxious expectation: would war erupt, or could the situation be contained?

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A change within: tracing Iran's path to negotiations

After a long period of tough rhetoric, Iran has made a strategic shift in its foreign policy in recent weeks. Iranian Supreme Leader Ayatollah Ali Khamenei, who had firmly banned any negotiations with the U.S. on the nuclear program, suddenly changed course. What drove this decision? It is important to recognize that this shift resulted not only from an external threat but also from a deep internal reassessment, one that was rational, compelled by the circumstances, yet conscious.

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The nuclear program: compromise is possible, surrender is not

One of the key issues in the Iran-U.S. negotiations remains the future of the Iranian nuclear program. Despite years of mutual accusations and broken trust, Tehran appears open to tactical compromises but not to

surrender. According to sources within Iranian political circles, Supreme Leader Ali Khamenei has agreed to discussions on all parameters of the nuclear program, including uranium enrichment levels and the terms for international inspectors' access to nuclear facilities.

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Flexing muscles: a show of force as a negotiating tool

The prospect of talks between Iran and the U.S. does not preclude military tensions. On the contrary, this year both countries carried out a series of shows of force to send a message: "We are approaching negotiations from a position of strength."

Iran, on the one hand, has stepped up military activity along its external borders. In April 2025, Tehran for the first time supplied its allies in Iraq with long-range ballistic missiles and drones, including the Shahed-136 and Mohajer-6. These moves were seen both as acts of support for Shiite militias and as a signal of Iran's readiness to launch strikes in the event of major conflict.

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Russia as a mediator: interest in stability and strategic partnership

Amid rising tensions between Iran and the U.S., Russia is emerging more clearly as a potential mediator and stabilizing force. Its role is shaped not only by current political dynamics but also by the deep structural ties built between Moscow and Tehran over the past years.

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Possible scenarios and a window of opportunity

The situation around Iran has reached a critical juncture. Amid a deep internal crisis, sanctions pressure and rising external tensions, Tehran must choose between a limited deal with the West that preserves its strategic assets or a drawn-out standoff that risks plunging the region into broader instability.

First scenario: moderate de-escalation

If the U.S. and Iran reached a compromise on the nuclear dossier, even in a limited format, it would create a short-term opportunity for stabilization. Iran would benefit from partial sanctions relief, increased oil export capacity and attract investment in critical sectors. In return, Tehran would commit to transparency, lower uranium enrichment levels and IAEA oversight. This scenario could also partially ease tensions around Israel, reducing the risk of direct conflict.

Second scenario: a new wave of escalation

If the negotiations reach a deadlock—whether due to Washington's excessive demands, Iran's refusal to compromise on sensitive issues or outside interference—the situation could quickly spin out of control. In that case, possible outcomes include:

- Direct strikes on Iran's nuclear facilities (by Israel or the U.S.),
- Retaliatory attacks on U.S. bases in Iraq and Qatar,
- Blockade of the Strait of Hormuz,
- More active operations by Shiite militias in the region.

3. THERE'S ONLY ONE GOOD IRAN DEAL

Multiple kinds of agreements are possible - but only one would be effective.

Matthew Kroenig, Foreign Policy, 30 April 2025

<https://foreignpolicy.com/2025/04/30/theres-only-one-good-iran-deal/>

In a wide-ranging interview with *Time* magazine last week, U.S. President Donald Trump said, "I think we're going to make a deal with Iran. Nobody else could do that." He then tapped Michael Anton, the State Department's policy planning director, to lead technical negotiations over Iran's disputed nuclear program.

With the technical talks kicking off, it is time to assess whether a new and effective nuclear deal between Iran and the United States is feasible and, if so, what it might look like.

4. US-IRAN NUCLEAR TALKS: A FRAGILE OPENING FOR DIPLOMACY

Middle East Institute (MEI), 24 April 2025

<https://www.mei.edu/multimedia/podcast/us-iran-nuclear-talks-fragile-opening-diplomacy>

Following seven years of diplomatic deadlock, Washington and Tehran have resumed nuclear negotiations - and for the first time in years, there are signs of real momentum.

Alex Vatanka, MEI Senior Fellow and author of *The Battle of the Ayatollahs in Iran*, joins hosts Alistair Taylor and Matthew Czekaj to analyze the current round of talks, the technical issues under discussion, and the political stakes on both sides. He explores Iran's economic and domestic pressures, US red lines, and the role of key players like Israel, China, and Oman in shaping the negotiations.

5. WITH IRAN, NO ACTION MIGHT BE THE BEST APPROACH

Negotiations could strengthen the regime - and so could military strikes.

Steven A. Cook, Foreign Policy, 24 April 2025

<https://foreignpolicy.com/2025/04/24/iran-us-trump-nuclear-deal-negotiations-military-strikes-jcpoa/>

Extracts

For people in Washington who focus on Iran and can tune out the rest of the Trump-induced chaos, the city feels kind of like it did a decade ago when then-President Barack Obama's administration was negotiating the Joint Comprehensive Plan of Action (JCPOA). The players are different, of course, but the same binary arguments - whether diplomacy or military action is the best way to deal with Iran's nuclear program - are dominating the debate within the foreign-policy community. Like in 2015, each side of the debate believes it is offering a morally and strategically superior alternative to the other. In reality, both options are suboptimal.

6. CAN A DEAL AVERT DISASTER? PROSPECTS FOR US-IRANIAN NUCLEAR TALKS

Middle East Institute (MEI), 22 April 2025

<https://www.mei.edu/events/can-deal-avert-disaster-prospects-us-iranian-nuclear-talks>

The US and Iran are set to hold a second round of negotiations over Tehran's nuclear program this weekend. The Trump administration has reimposed its "maximum pressure" campaign on Iran, and President Donald Trump has threatened that there will be "all hell to pay" if Tehran does not abandon its program. Both sides described the first round of talks as positive but now seem to be hardening their positions. What concessions are the two countries willing to make, and how likely are they to reach a deal?

This on-the-record briefing featured Kenneth Pollack, Vice President for Policy at the Middle East Institute (MEI). Pollack twice served on the National Security Council and began his career as a military analyst at the CIA. The briefing also featured Alan Eyre, a Distinguished Diplomatic Fellow at MEI. A former senior US diplomat, Eyre served as a core member of the US nuclear negotiating team with Iran from 2010-15.

Our experts covered what's at stake in these negotiations, the constraints facing both sides, the potential impact of outside powers like Russia and Israel, and the repercussions of failing to reach a deal.

7. MOSCOW AND TEHRAN ARE IN THE SAME BOAT

Andrey Kortunov, Russian International Affairs Council (RIAC), 21 April 2025

https://russiancouncil.ru/en/analytics-and-comments/comments/moscow-and-tehran-are-in-the-same-boat/?sphrase_id=205413823

Extracts

Russian Deputy Foreign Minister Andrey Rudenko recently said that Russia will not provide military assistance to Tehran if the US attacks Iran. On the other hand, Russia and Iran signed a comprehensive strategic agreement in January 2025 with the aim of strengthening military and economic cooperation. Aren't these two approaches contradictory? Can Iran trust the Russians, especially given Russia's abandonment of Bashar al-Assad in Syria? Russia had previously refused to deliver the S-300 missile system to Iran and had previously voted in favor of UN Security Council Resolution 1929 against Iran.

KORTUNOV: The bilateral comprehensive strategic partnership agreement signed in January of 2025 does not include any clauses similar to Article 5 of the North Atlantic Treaty. In other words, neither side makes a firm commitment to directly support its partner on the battlefield, if the partner is under attack by a third party. However, if the US (or US together Israel) strikes Iran, Tehran can count on Russia's support

including motions within the UN Security Council, additional military and humanitarian assistance and through other means that both sides would consider appropriate.

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Should Iran be worried about Trump's rapprochement with Russia? Could a deal between Trump and Russia over Iran be possible in exchange for Russia giving concessions on Ukraine? If this deal really exists, what would it be and what consequences would it have for Iran?

KORTUNOV: We still do not know how far the US-Russian rapprochement may go. The two sides are only starting discussion some of the most politically sensitive and potentially divisive matters. My personal completely uninformed guess is that in Moscow they would love to become an intermediary between Washington and Tehran, but it remains an open question whether Tehran does indeed need such an intermediary. In any case, I do not believe that there is a real prospect for a Russia-US deal “at the expense” of Iran; the US-Iranian relations have their own logic and dynamics that can hardly be significantly affected from the outside.

Why does Russia always play Iran as a playing card in its negotiations with the Americans and European countries?

KORTUNOV: I would not use the term ‘playing card’ to describe Russia’s policies toward Tehran. Iran is a big and an important country—not only in the region, but also in Eurasia and in the world at large. For Moscow, bilateral relations with the Islamic Republic have its own value, separate from Russia’s relations with the United States and Europe. This is particularly true now, when Moscow’s cooperation with major Western powers has gone down the drain. Still, close partnership with Iran may be regarded by policy-makers in the Kremlin as an asset that could be used to strengthen Russia’s negotiation positions in some future talks to their Western counterparts.

Some believe that Russia has provided a new path for Iran in terms of economy and trade by supporting Iran's membership in BRICS and the Shanghai Cooperation Organization. Others believe that Russia has nothing to offer (especially technology) other than providing weapons to help Iran's economy. What is your opinion? If you were to advise the Iranian government on this matter, what would you say?

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As for Russia, it is not in a position to meet all possible Iranian demands for modern technologies or for investments. However, it would be wrong to write Russia off—it has some unique pockets of technology beyond the military field, that Iran might find of interest, including atomic energy, space exploration, oil and gas extraction, information and bio-technologies, etc. If I were to advise the Iranian leadership, I would say that the Islamic Republic should count primarily on its in-house capacity, which is very substantial. As they say in Tehran, “the neighbor's chicken is a goose”.

Will Russia benefit from the tightening of oil sanctions against Iran? Some analysts believe that Iran and Russia are both competitors in the field of energy and that their cooperation is only due to their anti-American approach. What is your opinion? Are the foundations of cooperation between the two countries weak?

KORTUNOV: I agree that Russia and Iran are competitors in hydrocarbons. Yet, this is not the only game in town. There are other major producers of oil and gas around, including Arab Gulf states, the United States, Venezuela and so on. This competition does not exclude cooperation, including joint efforts to manage global oil prices. Still, I also agree with you that the existing foundations of cooperation between the two nations remain weak. This is not only about business links, which are still quite modest, but also about broader social and humanitarian interaction. For instance, we do not have a lot of educational exchanges between Russia and Iran or many joint R&D projects. This situation has to be changed.

The Iranian people have always had a negative view of the Russian government due to historical experiences. Where did this view begin and originate and what is the reason for it?

There is a long track record that explains these negatives attitudes. Some of them go back to XVIII-XIX wars between the Russian and the Persian Empires, others can be traced to the Soviet-British occupation of Iran during the second world war. You’ve mentioned Moscow’s indecisiveness in closing the S-300 deal with the Islamic Republic back in 2010. I am primarily concerned about anti-Russian sentiments within the educated Iranian urban youth, which will define the future of the nation in years to come. There is no silver bullet to solve this problems; the only direction I can think of is more social and human interaction, more open and candid discussions exposing not only common interests, but also diverging ones.

If the agreement between Iran and the United States becomes serious, will Russia feel threatened and obstruct it? In any case, Iran's rapprochement with the West will not be in Russia's interest. What might Russia do in this regard to sabotage it?

I do not believe that Russia can obstruct any Iran-US agreement. Such an agreement would affect relations between Tehran and Moscow. Iran will lessen its dependence on Moscow, as well as its dependence on Beijing and other non-Western partners. An unrestricted flow of the Iranian oil to global markets would also have an impact on Russia's interests by bringing the export prices on Russia's hydrocarbons down. At the same time, Russia is absolutely not interested in a large-scale military clash between Iran and the United States, since a clash is likely to have devastating repercussions for the whole world, Russia including. Today, with an ongoing rapprochement between Moscow and Washington, there is even less appetite in Russia to act as a spoiler in a potential Iran-US dialogue. Yet, there is a lot of skepticism in Moscow about the likely outcome of the negotiations between Tehran and Washington: the Trump Administration is likely to have a rather narrow attention span, and the pressure from Israel will prevent it from demonstrating the level of flexibility needed to reach at least a partial agreement on the Iranian nuclear portfolio.

Some believe that an Iran that has approached the West poses a greater threat to Russia than an Iran that has acquired nuclear weapons. Some, however, believe that Russia, as a country that itself possesses nuclear weapons, will not tolerate a neighboring country like Iran acquiring nuclear weapons. What do you think about this?

The Russia's position has always been that nuclear proliferation should be avoided to the extent possible. If Iran goes nuclear, this might trigger a chain reaction in the region with other countries like Saudi Arabia, Turkey and even Egypt being tempted to acquire their own nuclear weapons. The question, however, is whether Moscow can stop Tehran from going nuclear, if such a decision is made by the Iranian leadership. My personal guess is that if there is a major Israeli or US strike against Iran sometime this year or in 2026, the decision-makers in Tehran might opt for going nuclear no matter what Iranian partners might think of such a decision. However, if at least an interim agreement with the United States is reached and at least some of the Western sanctions imposed on the Islamic Republic are lifted, Iran may well prefer not to cross the nuclear red line.

Russia has relations with all the countries in the region, including Saudi Arabia and Israel. Do you think Russia will be able to maintain a balanced relationship with Iran in the long term, along with its relations with the rest of the region? How?

Russia's strategy is indeed aimed at keeping delicate balances in the region without tilting too much to one side. That includes Israelis and Palestinians, Sunnis and Shia, Arabs and Iranians, Turks and Kurds, and so on. So far, Moscow has been mostly successful in these attempts, at least, more successful than many other non-regional actors. Speaking specifically about Iran, the Russian position has always been that it is counterproductive and even impossible to exclude the Islamic Republic from the region and no security arrangement in the Middle East would be stable and lasting unless Iran is a part of it. This is why Russia has decisively opposed the idea of an "Arab NATO" that could deter and contain Iran.

Is Russia's relationship with Israel more important or its relationship with Iran, and why? Some analysts say that Russia showed Israel the location of Iranian military and advisory forces in Syria, and the points where Israel attacked them. To what extent do you think this speculation is correct?

It is not easy to compare Iran and Israel as Russia's foreign policy priorities. Iran is much bigger than Israel, the history of Russian-Iranian relations goes deep into Middle Ages, and political leaders in Moscow and in Tehran have many common views on regional and global matters, as well as on the desirable new world order. Israel, in its turn, has a large Russian and Russian-speaking community, it is an important economic partner for Russia (one should mention that Israel has never subscribed to US or EU sanctions against Moscow).

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Can President Trump drive Iran and Russia apart? How? What impact will the tariffs imposed by President Trump have on Iran-Russia relations?

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The global demand on Russia's and Iran's commodities will decline, its energy and raw materials exports will start shrinking and domestic economic growth will eventually go down due to growing trade deficits, depreciation of national currency and higher inflation. So, if in Moscow and in Tehran can count on short-

term geopolitical gains caused by the emerging transatlantic rift, it also has to consider potential mid and long-term economic losses linked to numerous disruptions within the global economic system.

8. COULD RUSSIA SUPPORT US-IRAN NEGOTIATIONS? AN INDIRECT OPPORTUNITY WORTH EXPLORING

Alex Vatanka, Middle East Institute (MEI), 18 April 2025

<https://www.mei.edu/publications/could-russia-support-us-iran-negotiations-indirect-opportunity-worth-exploring>

Extracts

On April 12, the United States and Iran wrapped up their first round of renewed diplomatic talks in Muscat, with round two set for April 19, in Rome. In the interim, Iranian Foreign Minister Abbas Araghchi traveled to Moscow to coordinate with the Russians. But the real breakthrough will not come from nuclear talks alone - it will require confronting the region's most explosive fault line: the Iranian-Israeli standoff. Russia claims it can help. And while there are inherent risks for Washington with re-engaging Moscow on high-stakes diplomatic issues, Russian support in easing Iranian-Israeli tensions outweigh such concerns for US negotiators looking to strike a deal with Tehran.

The red lines

At the heart of President Donald Trump's Iran policy has always been a singular red line: Iran must never obtain a nuclear weapon, especially one that could threaten Israel's existence. Nor does Trump want to see the US dragged into another costly war in the Middle East. Those two goals might seem at odds, but there is a narrow path where they converge. Moscow, despite being a purported strategic partner to Tehran, shares Trump's concern about a nuclear-armed Iran — if not always for the same reasons.

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Iran and Russia's asymmetric relationship

Today, Russia holds real leverage over Iran on the nuclear issue but perhaps also on the question of Iran's policy toward Israel. Moscow has helped diplomatically prop up the Islamic Republic through years of US-led sanctions, often supplied Tehran with weapons, and coordinated closely in Syria, although Bashar al-Assad's sudden fall in December 2024 demonstrated that Russian-Iranian military collaboration was less robust than publicly claimed by the two countries. In fact, Iranian officials were furiously that Russia largely stood by as Israel carried out a decade-long air campaign in Syria and other operations aimed at disrupting Tehran's efforts to entrench itself on the eastern Mediterranean.

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In the long game, Russia does not have the entrenched partnerships, financial muscle, or global reach to displace the US in the Middle East. But if it can help contain Iran just enough to avoid a war — and do so on Trump's terms — it might be worth letting Putin play the middleman. In the world of *realpolitik*, you take your wins where you can get them. And if Putin can get Iran to back off Israel, and Israel to lower the temperature in return, then maybe — just maybe — Trump should let him try.

9. WHAT DOES A US-RUSSIA RAPPROCHEMENT MEAN FOR IRAN?

Middle East Institute (MEI), 18 April 2025

<https://www.mei.edu/events/what-does-us-russia-rapprochement-mean-iran>

The Trump administration is seemingly reversing decades-long US policy on Russia and adopting a conciliatory tone toward Moscow while reimposing a “maximum pressure” campaign on Tehran. In recent years, Iran and Russia had grown increasingly close on a variety of issues, including the current war in Ukraine, driven by their shared opposition to US and Western pressure. Could warming US-Russia ties threaten Tehran's ostensible strategic alliance with Moscow?

This on-the-record briefing featured Alex Vatanka, MEI Senior Fellow and author of the book *The Battle of the Ayatollahs in Iran: The United States, Foreign Policy, and Political Rivalry since 1979*. The briefing also featured Iulia-Sabina Joja, Senior Fellow at MEI and European security expert with experience at the NATO Allied Command Transformation in Virginia.

Our experts discussed Washington's overture toward Moscow and what it might mean for Iran-Russia ties, the impact of Moscow and Tehran's apparent miscalculation on Syria, Russia's potential role in US-Iran nuclear negotiations, and the future of US-imposed sanctions on both countries.

10. A NUCLEAR DEAL WITH IRAN IS POSSIBLE—BUT ONLY IF THE U.S. LEARNS FROM HISTORY

A former Iranian diplomat outlines a path forward.

Seyed Hossein Mousavian, Foreign Policy, 18 April 2025

<https://foreignpolicy.com/2025/04/18/nuclear-deal-iran-possible/>

Extracts

As the second round of nuclear talks between the United States and Iran get underway this weekend, suspicion and distrust between the two sides remain high. U.S. President Donald Trump continues to make threats against the country I served for years as a policymaker and a diplomat. Understandably, Iranian Supreme Leader Ali Khamenei remains cautious. "We are very pessimistic about the other side, but we are optimistic about our own capabilities," he said recently.

As such, many analysts believe the chances of a deal are slim. In fact, the American side doesn't seem entirely sure what outcome it wants from the negotiations. U.S. Middle East envoy Steve Witkoff has emphasized that any agreement must be "Trump's deal"—distinguishing it from the 2015 nuclear agreement reached under then-U.S. President Barack Obama. Earlier this week, Witkoff said that Iran could maintain a program enriching uranium up to 3.67 percent. He then reversed course, saying the president's position was to eliminate Iran's ability to enrich uranium altogether.

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11. THINKING THE UNTHINKABLE: IMPROVED US-IRAN RELATIONS UNDER TRUMP?

Ross Harrison, Alex Vatanka, Middle East Institute (MEI), 18 April 2025

<https://www.mei.edu/publications/thinking-unthinkable-improved-us-iran-relations-under-trump>

Extracts

It is no surprise that both Iran and the United States have approached their first diplomatic engagement in four years with wariness and skepticism. While not an insuperable hurdle, it is hard to overcome more than 40 years of mutual enmity. Both parties have set the stage with characteristic bellicosity. Prior to the start of talks in Muscat, Oman, Iranian President Masoud Pezeshkian said, "We are not seeking war, but we will stand strong against any aggression." Washington has made equally vitriolic statements, with President Donald Trump saying, "If they don't make a deal, there will be bombing."

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Divisions within the elite

There are also elites in Iran advocating for a deal that goes beyond the nuclear file. Supporters of a regional reset in Tehran want Iranian policy to prioritize what the national interest dictates and not open-ended ideological pet projects such as supporting militant Islamist groups. As Nasser Hadian, a prominent foreign policy voice in Tehran, put it, negotiations with the US beyond the nuclear file can focus on areas of potential common interests, such as stability in neighboring Iraq: "Iraq is extremely important to us. Instability in Iraq means instability in Iran. These are goals we can agree on with the Americans — as we have in the past." Indeed, Washington and Tehran have at times coordinated their efforts in Iraq, including during the fight against ISIS.

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A pivotal moment

In sum, there are significant opportunities to take advantage of regional, global, and domestic trends to forge an agreement that could remove a big source of instability from the Middle East, and perhaps even create the possibility of peaceful coexistence between the United States and Iran. There are also opportunities for a more comprehensive agreement than the 2015 JCPOA. But there are equally significant risks of misreading

the moment and letting this opportunity slip by, with potentially dire consequences for the region and even the global community.

12. TRUMP IS ABOUT TO LEARN THAT IRAN IS A PROBLEM WITHOUT A SOLUTION

A second round of nuclear talks will be held this weekend.

Aaron David Miller and Lauren Morganbesser, Foreign Policy, 17 April 2025

<https://foreignpolicy.com/2025/04/17/trump-iran-united-states-nuclear-talks-diplomacy-witkoff-jcpoa/>

Extracts

As Steve Witkoff, U.S. President Donald Trump’s “envoy for everything,” sits down again with a top Iranian diplomat this weekend, he confronts one galactic diplomatic lift. In Rome, Witkoff will face off against Iranian Foreign Minister Abbas Araghchi, a skilled nuclear negotiator from a repressive authoritarian regime that has been badly weakened by Israel and is in no mood for dramatic concessions, let alone capitulation to Washington.

At home, Witkoff is surrounded by the president’s hard-line advisors—who don’t believe an agreement is possible—and an impatient, impulsive president who wants a quick deal and is threatening the use of force if he can’t get one. The first meeting, in which everyone seemed to abide by Emily Post’s guide to good table manners, will be unlikely to be repeated this coming weekend as the diplomatic bromides give way to much tougher positions.

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13. THREE ISSUES TO WATCH IN TRUMP’S EMERGING IRAN POLICY APPROACH

Brian Katulis, Middle East Institute (MEI), 16 April 2025

<https://www.mei.edu/publications/three-issues-watch-trumps-emerging-iran-policy-approach>

Extracts

The biggest recent development to emerge from the still-evolving Middle East policy of President Donald Trump’s second administration was the initiation of talks between the United States and Iran in Oman last Saturday, with the next round reportedly on track for later this week. This small sign of hope for diplomatic progress comes at a time when the Trump administration continues to implement an assertive and unpredictable economic unilateralism that has roiled global markets and reduced trust and confidence between the United States and most of its close international partners. How this broader approach on foreign policy, one that devalues international cooperation, plays out on the Iran file will be important to monitor.

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US Middle East policy: What to watch for as Iran talks continue

The new template for US foreign policy that Trump is advancing has already had an impact on his approach to the Middle East, and Iran may be its most important test. Tehran is closer than ever to being able to produce a nuclear weapon, and it maintains partnerships with regional terrorist groups and extremist organizations in an “Axis of Resistance” that, although battered by the past year and a half of war, remains operational and capable of doing significant damage. Three things to watch closely as Trump’s Iran policy evolves and his broader national security approach unfolds:

1. Divisions within Trump’s own team.
2. Gaps between the United States and key Middle East partners.
3. Who will monitor and verify a potential deal with Iran?

Trump’s emerging Iran policy will depend on how the next round of talks go, but the moves he is making on his broader foreign policy, along with divisions among his own national security team and splits between key US Middle East partners, will also determine whether the outcomes of this approach will be sustained and lasting.

14. IRAN'S "LOOK EAST" POLICY: IDEALS VS. HARSH REALITIES

Alex Vatanka, Middle East Institute (MEI), 16 April 2025

<https://www.mei.edu/blog/irans-look-east-policy-ideals-vs-harsh-realities>

Extracts

This article is published as part of the Perry World House workshop "U.S.-Iran Relations Under Trump 2.0: Lessons Learned and Likely Scenarios."

The Iran-Russia-China partnership is often portrayed as a cohesive bloc resisting U.S. hegemony. While there is some truth to this narrative, it is frequently overstated. In recent years, Iran has joined institutions widely seen as counterweights to Western influence - the Shanghai Cooperation Organization (SCO) and BRICS - and is set to enter a free trade agreement with the Russia-led Eurasian Economic Union in May 2025. Meanwhile, China remains Iran's primary, and often only, major oil customer. On the surface, these developments suggest strategic alignment. But a closer look reveals a relationship driven more by pragmatic opportunism than ideological solidarity or durable alliance.

A strategic reckoning awaits

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Iran's recent full membership in BRICS and SCO is hailed by its leadership as proof of emerging multipolarity. President Masoud Pezeshkian even proposed a BRICS roadmap to de-dollarize energy trade and neutralize Western sanctions. But despite the rhetoric, neither bloc is ready to confront the U.S.-led financial order directly. Many BRICS and SCO members, including India, Brazil, and the UAE, prioritize balanced relations with the West. Furthermore, the Gulf states have joined these platforms to hedge against U.S. decline—not to align with Iran. Their presence in SCO/BRICS is as much about limiting Tehran's influence as it is about diversifying their own partnerships.

In short, the Islamic Republic's belief that it belongs to a rising anti-Western bloc is more ideological assertion than strategic reality—and one increasingly out of step with the world's evolving power dynamics. Moscow and Beijing have consistently prioritized their own global interests over any lasting commitment to Tehran. What may look like an emerging axis is, in practice, a transactional and asymmetric relationship—with Iran as the junior, and often disposable, partner. If Tehran continues to stake its future on assumed support from Russia and China, it risks deeper isolation, declining regional relevance, and a weakening of its strategic hand.

15. FROM DIPLOMACY TO DETERRENCE: IRAN'S NUCLEAR CALCULATIONS

Mohammad Khatibi, Modern Diplomacy, 16 April 2025

<https://moderndiplomacy.eu/2025/04/16/from-diplomacy-to-deterrence-irans-nuclear-calculations/>

Extracts

The United States' withdrawal from the Joint Comprehensive Plan of Action (JCPOA) under President Donald Trump marked a turning point in Iran's nuclear trajectory. This unilateral decision dismantled the framework that had previously aimed to restrict Iran's nuclear activities in exchange for sanctions relief. As a result, renewed negotiations on Tehran's nuclear program have become a necessity.

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This perspective suggests that Iran's nuclear doctrine is not rigid. While sanctions and external pressures alone will not force Iran to abandon its nuclear program, a direct existential threat could fundamentally alter its stance.

Iran's nuclear trajectory remains a complex interplay of geopolitical, economic, and ideological factors. While Tehran has so far resisted the pursuit of nuclear arms, mounting regional instability, military threats, and shifting alliances could ultimately push it toward a new nuclear doctrine. The future will largely depend on whether diplomatic engagement, deterrence strategies, or outright military confrontation shape Iran's next move.

16. IRAN'S NUCLEAR COUNTDOWN: A NARROWING WINDOW FOR GLOBAL ACTION

John Calabrese, Modern Diplomacy, 10 April 2025

<https://modern diplomacy.eu/2025/04/10/irans-nuclear-countdown-a-narrowing-window-for-global-action/>

Extracts

Iran's nuclear breakout time — the period needed to produce weapons-grade uranium — has shrunk to mere days, signaling both rapid nuclear advancement and a diminishing window for global response. Compounding the urgency is the imminent expiration of “snapback sanctions” under UN Security Council Resolution 2331 in October 2025, with Iran's uranium stockpile set to reach critical levels by mid-2025. Global decisionmakers now face a stark choice: reinvigorate diplomatic efforts, intensify economic sanctions, or risk a preventive military strike. Each passing week further heightens the risk of a destabilizing nuclear breakthrough.

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Conclusion

At this critical juncture, the international community faces a perilous challenge as Iran's nuclear program accelerates — reducing its breakout time to days while snapback sanctions expire in October 2025. Divergent stakeholders are locked in a stalemate: regional players like Saudi Arabia and the UAE hesitate to mediate, whereas the European E3 insists on strict IAEA compliance and sanctions. In contrast, China and Russia advocate for a return to the original JCPOA. Washington's dual strategy — combining maximum pressure with ambiguous diplomatic outreach — has only emboldened Iranian hardliners and deepened mistrust, heightening the risk of a preventive military strike, especially by Israel.

Though Iran has previously defied UN resolutions, its adherence to the 2015 nuclear deal before the US withdrawal indicates that diplomacy remains a viable path. With its proxies diminished, deterrence weakened, and economic pressures mounting, negotiation remains the more prudent course — one that key international players can still help shape. With traditional arms control frameworks crumbling, only a bold, unified diplomatic effort that reconciles these divergent interests can prevent a catastrophic escalation and safeguard global security.

17. IRAN LACKS THE LEVERAGE FOR A FAIR DEAL WITH THE US

Andrew Korybko, 3 April 2025

<https://eesticeest.com/iran-lacks-the-leverage-for-a-fair-deal-with-the-us/>

Extracts

Iranian-US tensions are boiling after Trump threatened to bomb Iran following its rejection of direct talks over a new nuclear deal. He also ordered the Pentagon to move six B-2 stealth bombers, which CNN assessed to be a full 30% of the US' stealth bomber fleet, to the Indian Ocean island of Diego Garcia. The Iranian Supreme Leader responded by promising strong retaliation if the US attacks while one of his chief advisors warned that their country would then have “no choice” but to build nukes if that happens.

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Even though the US could survive a major war with Iran, it still prefers to avoid one. So long as the US' demands remain limited to drastically curbing Iran's nuclear energy program and don't expand to include curbs on its support for regional allies or its ballistic missile program, then creative diplomacy could prevail. For that to happen, Russia would have to devise a set of incentives for Iran that the US approves of and Iran then agrees to, but that's still a far way off and Trump might strike first if he loses patience.

18. IRAN AND THE ACCUMULATION OF HISTORICAL CONCERNS ABOUT SURVIVAL

Ali Salehian, Modern Diplomacy, 29 March 2025

<https://moderndiplomacy.eu/2025/03/29/iran-and-the-accumulation-of-historical-concerns-about-survival/>

Extracts

In the realist school, the main desires of countries are considered to be survival and security. Iran, as one of the oldest civilizations in the region, has been facing this issue for many years. Due to its geographical location and other interests, such as connecting the East and West of the world and energy, Iran has always been attacked by foreign powers such as Alexander, the Mongols in ancient times, the Ottomans, and its eastern neighbors in the Middle Ages, and in contemporary times, Britain and Russia. Only during the last 100 years was Iran occupied once, in 1941 and in World War II, by the Allied forces despite declaring neutrality. In 1953, in response to Iran's attempts to nationalize its oil, the legitimate government was overthrown, and Western governments in Iran staged a coup. Finally, just a few months after the revolution, Saddam Hussein's regime imposed an all-out war on Iran that lasted eight years.

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In the latest developments, Trump has sent a letter to Iran offering a deal or choosing a military option. Iran can be handled: militarily, or you can make a deal," Trump told Fox Business. "I would prefer to make a deal, because I'm not looking to hurt Iran." To understand the mindset of decision-makers in Tehran, it is important to understand that Iranians view developments with a "Present History." This means that they see Trump as someone who withdrew from the JCPOA and took military action against Iran by assassinating General Soleimani. Of course, neither side wants a large-scale war now, but it remains to be seen whether the various pressures on Iran, in the event of military action against it, will bring it to "Day Zero" decision making, or whether diplomacy can address the Iranians' historical concern for survival, along with the ongoing distrust of the United States from the 1953 coup against Mossadegh to the hostile actions of the first Trump administration.' . Max pressure 1.0 leads to the "No war, No negotiation" policy of Iran, Max pressure 2.0 could lead to "Both War or/and Negotiation" policy.

19. IRAN'S GEOPOLITICAL FOOTPRINT: REGIONAL POWER OR GLOBAL CONTENDER?

Mohammad Jooni, Modern Diplomacy, 26 March 2025

<https://moderndiplomacy.eu/2025/03/26/irans-geopolitical-footprint-regional-power-or-global-contender/>

Extracts

Ideological Foundation: The Core of Iran's Foreign Policy

Since the Islamic Revolution of 1979, Iran's foreign policy has been deeply influenced by the ideological principles of the Islamic Republic. The revolution transformed the country from a pro-Western monarchy under Shah Mohammad Reza Pahlavi to an anti-imperial, Islamic republic. The core ideology, as articulated by the late Supreme Leader Ayatollah Ruhollah Khomeini, revolves around the concept of "Islamic resistance" against foreign influence, particularly from Western powers, and the establishment of an Islamic government that would serve as a model for the Muslim world.

This ideological basis drives Iran's foreign policy by positioning itself as a defender of oppressed peoples, particularly in the Muslim world, and as an adversary to the hegemony of the United States, Israel, and Western influence in the region. This resistance mentality is evident in Iran's support for various political and militant groups across the Middle East, such as Hezbollah in Lebanon, Hamas in Palestine, and various Shiite militias in Iraq and Syria. These alliances are designed to challenge the regional dominance of Iran's adversaries and bolster the country's own strategic interests.

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Conclusion

Iran's foreign policy is a complex interplay of ideology, regional ambitions, and pragmatic diplomacy. The logic behind its foreign policy is rooted in the desire to protect its sovereignty, resist foreign influence, and assert itself as a dominant regional power. Iran's strategy of leveraging alliances, fostering regional influence, and employing flexible tactics has allowed it to navigate a tumultuous geopolitical environment and maintain its position in the balance of power. As global power dynamics continue to shift, Iran will

likely continue to adapt its strategy to counter external threats, assert its influence, and maintain its independence. The future of Iran's foreign policy will depend on its ability to balance ideological imperatives with pragmatic considerations, as well as its ability to navigate the complex web of alliances and rivalries that define the modern global order. Ultimately, Iran's role in the balance of power will remain a crucial factor in shaping the future of the Middle East and global geopolitics.

Iran's foreign policy remains shaped by a complex mix of ideological conviction and pragmatic considerations. Its pursuit of regional dominance, particularly in the Middle East, has brought it into direct confrontation with rivals such as Saudi Arabia and Israel, while its nuclear program continues to be a flashpoint in its relations with the West. The future of Iran's foreign policy will depend on its ability to navigate these tensions, maintain strategic alliances, and adapt to the shifting global order. As one of the most significant players in the Middle East, Iran's actions will continue to have far-reaching consequences for both regional and global geopolitics.

20. SAUDI-IRAN RAPPROCHEMENT: IMPLICATIONS FOR THE GLOBAL OIL MARKET

This article attempts to understand how the Saudi-Iran rapprochement brokered by China marks a significant shift in their bilateral relations.

Mashaal Shahnowaz, Modern Diplomacy, 18 March 2025

<https://moderndiplomacy.eu/2025/03/18/saudi-iran-rapprochement-implications-for-the-global-oil-market/>

Extracts

Saudi-Iran Rapprochement: China as the Key Mediator

After seven years of strained relations, China was able to mediate between Iran and Saudi Arabia to restore their diplomatic relations on 10th March, 2023.[10] Following the restoration of relations, both countries reopened their embassies in each other's countries by August 2023, flight operations between the two were resumed, trade of Iranian steel to Saudi Arabia was restored, and Iranian President, late Ebrahim Raisi visited Saudi Arabia to attend the Gaza summit in 2023.[11] Moreover, the General Agreement on Cooperation and the Security Cooperation Agreement were restored and both countries agreed to respect each other's sovereignty and refrain from interfering in each other's internal affairs.[12]

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Conclusion

The Saudi Iran détente holds potential to alter Middle Eastern dynamics, enable oil production stability, investment and joint OPEC influence, while augmenting regional oil exporters and China's role in the market. Although it may challenge US influence, this rapprochement offers opportunities for regional stability, economic cooperation and global market resilience. Therefore, sustaining this newfound peace requires trust-building, ending proxy conflicts, confidence building measures, and resolving disputes, paving the way for a cooperative Middle East.

21. TRUMP'S TRADE WAR IS AN OPPORTUNITY FOR IRAN

If Trump fulfills these ambitious and unprecedented pledges, he will undoubtedly be remembered as one of the most consequential presidents in U.S. history.

Esfandiar Khodaei, Modern Diplomacy, 11 March 2025

<https://moderndiplomacy.eu/2025/03/11/trumps-trade-war-is-an-opportunity-for-iran/>

Extracts

Trump has made many grand promises: annexing Greenland to the United States, making Canada the 51st state, bringing the Panama Canal under American control, peacefully relocating two million people of Gaza and placing it under U.S. administration, expelling millions of illegal immigrants, imposing heavy tariffs on China, Mexico, Europe, Canada, and other U.S. trading partners, and halting Iran's nuclear program—either through a deal or, if necessary, with a “limited” military strike.

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If Trump were under the full influence of the Israeli lobby, his priorities would resemble those of George W. Bush—focused on the Middle East, dismantling Iran's nuclear program, and countering threats to Israel,

particularly from Hamas in Gaza, Hezbollah in Lebanon, and Ansarullah in Yemen. Instead, Trump's main concerns lie with China, Canada, Greenland, Panama, Mexico, and resolving America's trade deficit—rather than sinking trillions into the Middle East with no tangible returns. The evidence suggests that Trump does not blindly follow Israeli policies, which presents an opportunity for Iran. The art of politics lies in recognizing and seizing such opportunities. Analyzing Trump's broader economic and political battles suggests that he may be willing to reach an agreement with Iran—trading nuclear restrictions for sanctions relief. Even if Iran and Trump fail to reach a comprehensive deal like the 2015 Nuclear Deal JCPOA, a tacit understanding—similar to what existed under Biden—would still be a major advantage for Tehran. Trump's trade war against China, Europe, Canada, Mexico, and other nations presents a unique opportunity for Iran.

22. HOW LIKELY IS TRUMP TO PLAY THE IRANIAN & RUSSIAN CARDS AGAINST INDIA IN THEIR TRADE TALKS?

Andrew Korybko, 12 March 2025

<https://eestiest.com/how-likely-is-trump-to-play-the-iranian-russian-cards-against-india-in-their-trade-talks/>

Extracts

The means to that end go beyond criticizing its high tariffs. Trump has threatened to modify or rescind India's sanctions waiver for Iran's Chabahar Port, while his Commerce Secretary Howard Lutnik just repeated the lie that India is colluding with BRICS to create a new currency and pressured it to stop buying Russian arms while speaking at last week's 2025 India Today Conclave. India has repeatedly denied that it's de-dollarizing while its import of Russian arms has steadily decreased over the years.

These three pressure points – trade with Iran, ties with BRICS, and arms from Russia – are being creatively leveraged by the US in pursuit of the comprehensive trade deal with India that Trump envisages clinching to turbocharge his “Pivot (back) to Asia” after the Ukrainian Conflict ends. In the order that they were mentioned, the US' pressure on India over Iran is meant to make it prohibitively costly for Indian companies to conduct business along the North-South Transport Corridor (NSTC).

That megaproject is a strategic priority for India since it aims to partially counterbalance Chinese influence over Russia, the Central Asian Republics, and Afghanistan through economic means. This goal also aligns with the US', however, so it's possible that Trump's associated threats might just be a ploy to get India to lower its tariffs and/or pressure Iran into another deal with the US. As for the second lever, the one related to BRICS, this one is based on literal lies since India isn't creating another currency.

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relief. Even if Iran and Trump fail to reach a comprehensive deal like the 2015 Nuclear Deal JCPOA, a tacit understanding—similar to what existed under Biden—would still be a major advantage for Tehran. Trump’s trade war against China, Europe, Canada, Mexico, and other nations presents a unique opportunity for Iran.

24. PUTIN MIGHT BROKER AN IRANIAN-US “NEW DÉTENTE” AS A RECIPROCAL FAVOR TO TRUMP

Andrew Korybko, 5 March 2025

https://thealtworld.com/andrew_korybko/putin-might-broker-an-iranian-us-new-detente-as-a-reciprocal-favor-to-trump

Extracts

If an Iranian-US “New Détente” follows the nascent Russian-US one, brokered as it might be by Putin as a reciprocal favor to Trump for everything that he’s now boldly doing, then this would completely transform Western Eurasian geopolitics and consequently unlock exciting geo-economic opportunities. These complementary outcomes could herald a new era in International Relations that would accelerate the global systemic transition to multipolarity and therefore be to the objective benefit of everyone.

25. ISRAEL’S DILEMMA: SHOULD IT STRIKE IRAN’S NUCLEAR PROGRAM BEFORE JANUARY 20?

Yaakov Lappin, Begin-Sadat Center for Strategic Studies, 15 January 2025

<https://besacenter.org/israels-dilemma-should-it-strike-irans-nuclear-program-before-january-20/>

EXECUTIVE SUMMARY: Israel faces a critical strategic decision regarding Iran’s nuclear program. The Islamic Republic is accelerating its enrichment capabilities and is systematically approaching the threshold of nuclear breakout. At issue is whether to strike Iran’s nuclear infrastructure immediately, leveraging Iran’s degraded air defenses and regional setbacks during the “lame duck” period of the current Biden administration, or wait for a potential alignment with the incoming Trump administration, which could bring enhanced diplomatic and military support. Both options carry significant potential risks and benefits.

Extracts

Israel’s choice between striking Iran’s nuclear program before January 20 or waiting for Trump’s second term presents no easy answers. Immediate action offers a chance to neutralize an existential threat while Iran is vulnerable but carries the risks of escalation, isolation, and limited international support. Waiting suggests stronger diplomatic and military backing but risks Iran’s advancing its nuclear capabilities beyond the point of no return.

Israel must weigh these factors carefully. And while the decision must be heavily influenced by intelligence on the real-time status of Iran’s nuclear program, Israeli decision makers must take into account the danger of unknown unknowns when it comes to Iran’s nuclear program.

North-South Transport Corridor

26. OPPORTUNITIES AND THREATS OF THE NORTH-SOUTH CORRIDOR (INSTC) FOR IRAN

Fazel Shahcheragh, Modern Diplomacy, 25 March 2025

<https://moderndiplomacy.eu/2025/03/25/opportunities-and-threats-of-the-north-south-corridor-instc-for-iran/>

Extracts

In today's interconnected world and the ongoing transition to a new global order, trade corridors are not only vital arteries of the global economy but also strategic tools for geopolitical influence. The International North-South Transport Corridor (INSTC), a key project in Eurasia, aims to connect India to Russia via Iran, reshaping regional trade and political dynamics. This corridor, which reduces the trade costs between India and Russia by up to 55%, presents Iran with a unique opportunity to escape economic isolation and establish itself as the "Eurasian Transit Hub." However, realizing this vision requires regional stability, international cooperation, and the resolution of domestic structural challenges.

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Conclusion

The North-South Corridor is more than just a transit project; it represents a transformation in Iran's international alliances. By hosting this corridor, Iran not only strengthens its ties with Russia and China but also, by attracting India as a key trade partner, can avoid overdependence on either the West or the East. The success of this project requires not only effective diplomacy but also a serious domestic commitment to improving the business environment and ensuring transparency in international agreements. If Iran can manage the challenges ahead, the INSTC could turn the country into the "logistical heartland of Eurasia," a position that would have significant geopolitical ramifications and enhance Iran's influence in global equations.

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27. THE NEWLY SIGNED RUSSIAN-IRANIAN TRANSIT ROADMAP IS PROMISING BUT STILL INCOMPLETE

Andrew Korybko, 3 March 2025

<https://eesticeest.com/the-newly-signed-russian-iranian-transit-roadmap-is-promising-but-still-incomplete/>

Extracts

Russia and Iran signed a transit roadmap for this year late last month for maximizing trade along the North-South Transport Corridor (NSTC). The most important part concerns their plans for making progress on the Rasht-Astara railway between Iran and Azerbaijan and holding a high-level trilateral meeting between their countries sometime later this year. The project's delay has impeded the NSTC's most direct route and redirected lots of transit across the Caspian or along its eastern banks.

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Readers can learn more about the nascent Russian-US "New Détente" in the three preceding hyperlinked analyses, but the most pertinent takeaway is that the US' motivations predispose it to at least seriously considering a more flexible sanctions enforcement policy in furtherance of its grander goals. These are to leverage America's existing strategic partnership with India and envisaged one with Russia for eroding some of China's competitive advantages vis-a-vis the US via mutually beneficial deals with those two.

How all of this relates to the newly signed Russian-Iranian transit roadmap is that the possibility therefore exists that the US might reconsider applying its "maximum pressure" policy towards the NSTC. This scenario would likely be contingent on progress being made in reaching deals with Russia, Iran, and even India (the latter in regard to tariffs), but it would advance all four of their interests and thus retain the NSTC's viability, albeit reconceptualizing it as a means for balancing Chinese influence in Central Asia.

28. INTERNATIONAL NORTH-SOUTH TRANSPORT CORRIDOR: ENHANCING INDIA'S REGIONAL CONNECTIVITY

Nivedita Das Kundu, Valdai Discussion Club, 24 January 2024

<https://valdaiclub.com/a/highlights/international-north-south-transport-corridor/>

Extracts

The significance of the North-South Transport Corridor is that it provides a platform for improving cooperation as well as communications, and reduces barriers to permit the economies of each country to grow independently and achieve objectives for the benefit of the country and the region as a whole.

Map of International North South Corridor -Depiction of Existing Route and N-S Route



Previous Route (Transit Time 40 to 60 days)

INSTC Route (Transit time 25 – 30 days; 40% shorter, 30% cheaper)

Source: Federation of Freight Forwarders Association in India, Ministry of Commerce

Route to Moscow from Mumbai/JNPT

Distance – 8,700 nautical miles

Tentative cost – Freight \$1,300 to 1,800 per 20ft dry container. \$3,500 for refer containers up to St. Petersburg. Approx . \$800 /1000 USD transport from St. Petersburg to Moscow. Total cost – \$2,100 to 2,800 for a dry container.

Transit time – 25 to 30 days and 7 days to Moscow from St. Petersburg. Total 32 to 37 days to Moscow.

Main operators – Maersk, Hamburg Süd, MSC, CMA

Source: Federation of Freight Forwarders Association in India, Ministry of Commerce

INSTC Route to Moscow, from Mumbai/JNPT

Distance – 2,200 nautical miles + 3,000 kms

Tentative cost – Freight \$150 to BNB 20ft dry container. \$500 (volume discounted rate) from BNB to Amirabad, \$250 from Amirabad to Astrakhan and \$600 to Moscow (Russia and Iran maintain same tariff for same distance).

TOTAL – \$1,260 (adding 2 ports transshipment cost of \$260 approx.)

Transit time – 7 days to BNB, 3 days to Amirabad, 7 days to Astrakhan , 2 days for transshipments – Total 19 days.

Main Operators – Simatech, IRSIL

Source: Federation of Freight Forwarders Association in India, Ministry of Commerce

29. INTERNATIONAL NORTH-SOUTH TRANSPORT CORRIDOR (INSTC)

Asia Regional Integration Center, 2022

<https://aric.adb.org/initiative/international-north-south-transport-corridor>

Extracts

International North-South Transport Corridor (INSTC), is a multi modal transportation established in 12 SEP 2000 in St. Petersburg, by Iran, Russia and India for the purpose of promoting transportation cooperation among the Member States. This corridor connects India Ocean and Persian Gulf to the Caspian Sea via Islamic republic of IRAN, then is connected to St. Petersburg and North European via Russian Federation. The INSTC was expanded to include eleven new members, namely: Republic of Azerbaijan, Republic of Armenia, Republic of Kazakhstan, Kyrgyz Republic, Republic of Tajikistan, Republic of Turkey, Republic of Ukraine, Republic of Belarus, Oman, Syria, Bulgaria (Observer). Source: http://www.instc-org.ir/Pages/Home_Page.aspx

30. THE WEST FINALLY REALIZED JUST HOW GAME-CHANGING THE NORTH-SOUTH TRANSPORT CORRIDOR REALLY IS

Andrew Korybko, 21 December 2022

<https://korybko.substack.com/p/the-west-finally-realized-just-how>

Extracts

It's surprising how much time Bloomberg's writers invested in correcting their audience's perceptions about the North-South Transport Corridor, which they should sincerely be commended for doing. The only constructive critiques that can be leveled against their report is that it should have been published much earlier and that it predictably ends on the politically self-interested note of implying that the US' secondary sanctions threats could impede this project. Apart from that, it's a rare masterpiece from the Mainstream Media.

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Clarifying India's Grand Strategic Intentions

To be absolutely clear, India doesn't revel in spiting the West since it would prefer to cooperate with it in mutually beneficial ways, but it also won't unilaterally concede on its objective national interests either and especially not under the threat of illegal sanctions imposed outside the UNSC. While some American policymakers might conclude that this makes India a latent geopolitical challenge to their declining unipolar hegemony, the fact is that Indian-driven tripolarity via the NSTC isn't zero-sum.

The global systemic transition predates this year's dramatic events but was unprecedentedly accelerated by them, so much so that the processes that were unleashed have become irreversible by this point. This is especially so after Indian Prime Minister Modi declared his country's intention to lead the Global South throughout the course of its G20 chairmanship across the coming year, which Russia's Sherpa to that bloc fully endorsed by describing their partner as "the major voice of the Global South".

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Concluding Thoughts

Whatever ends up happening, it's becoming obvious that the NSTC will figure more prominently in the calculations at play as suggested by Bloomberg surprisingly correcting its audience's perceptions about this corridor in their extensively detailed report about it. This unexpected narrative development will predictably lead to more global attention being given to that corridor, but instead of putting pressure on its participants to curtail their activities, it might actually inspire more countries to utilize it.

31. RUSSIA AND IRAN ARE BUILDING A TRADE ROUTE THAT DEFIES SANCTIONS

The nations are investing upwards of \$20 billion to ease passage of goods along waterways and railways

Jonnathan Tirone & Golnar Motevalli, Bloomberg, 21 December 2022

<https://www.bloomberg.com/graphics/2022-russia-iran-trade-corridor/?embedded-checkout=true>

32. EXPERT: AZERBAIJAN ACTIVE PARTICIPANT IN NORTH-SOUTH TRANSPORT CORRIDOR PROJECT

AzerNews, 26 April 2020

<https://www.azernews.az/business/164494.html>

Extracts

The INSTC project has been modified over 20 years. As it turned from an idea into a reality, new participants connected to the INSTC, Kozyulin said.

“One of the three main routes of the project, the South-West Transport Corridor, runs through the territory of Azerbaijan. It does not just pass through this territory, but connects Azerbaijan with Russia, Europe, Iran, India and many other countries. For the economy of all participants, this is approximately the same as the opening of a subway between the districts of the city, where traffic jams used to be, and you had to get to the desired point bypassing the ring road. Only in our case, these areas are scattered thousands of kilometers away. The benefits of the new railway binder are obvious, and all participants will receive dividends when the corridor is fully operational,” the political expert noted.

“Azerbaijan is not just a transit territory, but an active participant in the project and the beneficiary. The INSTC brings not only obvious economic benefits, but also will strengthen the political and sociocultural relations of the participating countries,” Kozyulin added.

The foundation of the International North-South Transport Corridor was laid on September 12, 2000 according to an intergovernmental agreement signed between Russia, Iran and India. Azerbaijan joined this agreement in 2005. In general, 13 following countries have ratified this agreement.

The goal of creating the corridor is to reduce the delivery time of cargos from India to Russia, as well as to Northern and Western Europe. The new corridor is expected to reduce the delivery time from six to three weeks.

APPENDIX 1

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