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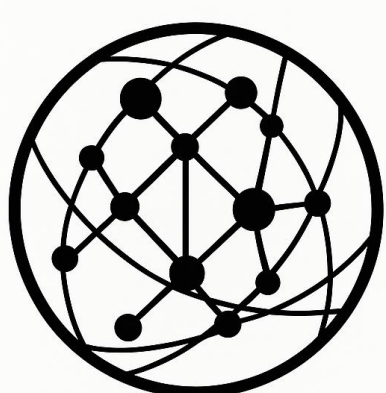
This policy brief is part of the EPINOVA Policy Brief Series on Strategic Competition, AI-Enabled Warfare, and Information Conflict.

Recommended Citation:

Wu, Shaoyuan (2026), *Bargaining Under Systemic Pressure: U.S. Objective Compression, Iranian Leverage Institutionalization, and the Reconfiguration of Negotiating Goals in the 85-Day Conflict*, Policy Brief No. EPINOVA-2026-PB-51, Global AI Governance and Policy Research Center, EPINOVA LLC. <https://doi.org/10.67037/epinova.pb.2026.051>.

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Bargaining Under Systemic Pressure:

U.S. Objective Compression, Iranian Leverage Institutionalization, and the Reconfiguration of Negotiating Goals in the 85-Day Conflict

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Date: May 23, 2026

Key Judgments

- **U.S. and Iranian negotiating objectives both changed under cumulative systemic pressure.** By Day 85, the conflict had not produced a clear bargaining victory for either side. Instead, it generated two parallel dynamics: U.S. objective compression and Iranian leverage institutionalization.
- **The United States shifted from coercive termination toward damage limitation and procedural control.** Early U.S. objectives implied strategic degradation of Iranian military, nuclear, missile, and maritime capabilities. By late May, the practical focus had narrowed to suspending hostilities, reopening Hormuz, managing the enriched uranium issue, and preserving a usable exit framework.
- **Iran shifted from wartime resistance toward bargaining-package expansion.** Tehran moved from rejecting externally imposed terms toward converting surviving leverage—Hormuz control, enriched uranium retention, sanctions relief, oil-export access, sovereignty language, and security guarantees—into elements of a broader settlement package.
- **The reported Pakistan-mediated draft suggests a transition to ceasefire-first sequencing.** If accurate, the draft prioritizes immediate ceasefire, mutual non-targeting, freedom of navigation, joint monitoring, follow-on talks within seven days, and phased sanctions relief tied to Iranian compliance.
- **Hormuz and the nuclear file became linked sequencing problems.** Hormuz transformed the conflict into a systemic negotiation over maritime governance and chokepoint stability, while the nuclear issue shifted from immediate settlement to follow-on negotiation over enriched uranium, sovereignty, and verification.
- **Neither side achieved its maximal objective.** The United States did not secure unconditional Iranian acceptance, immediate control over enriched uranium, or full abandonment of Iranian maritime leverage. Iran did not secure full sanctions relief, recognized Hormuz governance authority, confirmed reparations, U.S. troop withdrawal, or comprehensive security guarantees.

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Executive Summary

The first 85 days of the U.S.–Iran conflict show a shift from coercive bargaining to procedural de-escalation. The United States moved from seeking strategic degradation of Iranian capabilities toward a narrower focus on suspending hostilities, reopening the Strait of Hormuz, managing the enriched uranium issue, and preserving an exit framework.

Iran’s objectives also changed. Tehran expanded the bargaining package by linking any settlement to sanctions relief, oil-export access, sovereignty language, security guarantees, Hormuz arrangements, and retention or controlled handling of nuclear assets. This allowed Iran to convert survival under pressure into bargaining leverage.

The reported Pakistan-mediated draft, if accurate, reinforces this shift. Its emphasis on ceasefire, mutual non-targeting, freedom of navigation, joint monitoring, talks on unresolved issues within seven days, and phased sanctions relief suggests a move toward **ceasefire-first sequencing** rather than final settlement.

This brief argues that the conflict produced a dual bargaining structure: **U.S. objective compression** and **Iranian leverage institutionalization**. The negotiation became less about battlefield victory than about who could define the architecture of the post-conflict bargain.

Why This Matters

This case matters because battlefield superiority did not automatically produce bargaining control. The United States retained major military, economic, and diplomatic advantages, but its ability to impose a maximal settlement became constrained by systemic costs, Hormuz exposure, nuclear sequencing, alliance divergence, and mediator limitations.

The Strait of Hormuz turned the conflict from a bilateral coercive campaign into a systemic bargaining problem. Iran attempted to convert geographic leverage into settlement leverage, while the United States sought to restore freedom of navigation without allowing that leverage to become institutionalized.

The reported Pakistan-mediated draft is significant because it points to ceasefire-first sequencing: immediate ceasefire, freedom of navigation, monitoring, and follow-on talks before the hardest disputes are resolved. For policymakers, the lesson is that ceasefire design is not merely a pause in violence, but a strategic architecture for managing unresolved leverage under reduced kinetic pressure.

Methodological Note

This brief reconstructs reported bargaining positions from public reporting, regional media summaries, and prior EPINOVA analytical frameworks. It does not assess operational battlefield performance, independently verify battlefield claims, or authenticate leaked or alleged draft texts. The analysis focuses on bargaining logic, negotiation sequencing, reported settlement demands, and changes in leverage across the 85-day conflict.

The brief uses an appendix-based sourcing structure rather than in-text citations throughout the main analysis. Appendix A provides a chronology of reported bargaining positions and negotiation-relevant developments, while the Appendix Source List provides full source details. Chronology entries are selected for bargaining relevance rather than comprehensive event coverage.

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Reported draft terms are treated as unconfirmed unless formally released or acknowledged by the negotiating parties. Because some draft-related reporting involved contested attribution and regional media amplification, alleged draft provisions should be read as reported draft language rather than confirmed agreement text.

1. Analytical Framing: From Victory Terms to Bargaining Architecture

The central analytical question is not whether the United States retained military superiority. It did. Nor is the question whether Iran avoided serious military and economic pressure. It did not. The more important question is why battlefield advantage did not produce maximal bargaining power after 85 days.

This brief introduces a **Compression–Expansion Bargaining Model**.

U.S. objective compression refers to the process through which a militarily superior actor narrows its political demands as systemic costs, coalition constraints, third-party exposure, and adversary-held leverage reduce the feasibility of imposing a comprehensive settlement.

Iranian leverage institutionalization refers to the process through which a weaker but resilient actor attempts to convert surviving wartime pressure tools, especially chokepoint control, nuclear-stockpile retention, sanctions bargaining, oil-export access, and security guarantees, into recognized elements of a settlement structure.

Together, these processes produce a bargaining pattern in which the stronger actor lowers its minimum acceptable outcome, while the weaker actor broadens the agenda to convert survival into leverage.

The reported Pakistan-mediated draft, if accurate, indicates a further stage: ceasefire-first sequencing. This refers to a bargaining structure in which parties suspend hostilities before resolving the most difficult substantive disputes, using monitoring, dispute-resolution procedures, and conditional sanctions relief to manage unresolved leverage. This is not final peace. It is a procedural method for organizing unresolved conflict under reduced kinetic pressure.

2. Phase I: U.S. Coercive Termination and Iranian Resistance, Days 1–30

The conflict's early phase was defined by asymmetric bargaining expectations. Washington appeared to assume that escalation pressure could generate political compression: sustained military operations, sanctions leverage, coalition coordination, and maritime pressure would narrow Iran's settlement options. Tehran, by contrast, sought to survive the initial shock, preserve retaliatory capacity, and prevent the conflict from being reduced to a U.S.-defined nuclear-disarmament track.

The early U.S. approach was not simply negotiation backed by force. It was coercive bargaining designed to shape the terms, timing, and scope of any eventual negotiation. The implicit logic was that battlefield dominance and economic pressure could force Iran into a narrower settlement space before talks reached a durable framework.

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Iran’s early response followed a different logic. Rather than seeking conventional parity, Tehran attempted to preserve bargaining viability. It did so by retaining retaliatory options, exploiting geographic leverage around Hormuz, maintaining nuclear ambiguity, and linking de-escalation to broader questions of sovereignty, sanctions, and security guarantees.

Prior EPINOVA analysis framed this as cost imposition: Iran did not need to defeat the United States or Israel outright; it needed to make continued coalition pressure more expensive, politically difficult, and strategically less coherent over time.

The early phase therefore did not establish a clean path toward settlement. It created the conditions for a struggle over sequencing: whether the conflict would end through U.S.-defined coercive compression or through a broader bargaining package shaped by surviving Iranian leverage.

Table 1. Early-Phase Coercive Bargaining Logic

Dimension	United States	Iran
Initial bargaining posture	Coercive termination	Survival-based resistance
Strategic assumption	Battlefield pressure can compress Iranian choices	Endurance can preserve bargaining space
Primary sources of bargaining leverage	Military escalation capacity; sanctions pressure; blockade pressure; alliance coordination	Missile/UAV retaliation, Hormuz leverage, nuclear ambiguity, regional networks
Desired bargaining effect	Force Iran into a reduced settlement space	Prevent externally imposed settlement
Main bargaining risk	Overextension and declining settlement feasibility	Escalation exposure and cumulative infrastructure damage

Source: Author’s synthesis based on Reuters reporting on late-stage U.S.–Iran negotiations over ending the war, securing the Strait of Hormuz, and opening a broader negotiation window; supplemented by EPINOVA’s prior framework on cost-imposition dynamics in the U.S.–Iran conflict.

Note: This table is analytical rather than a verbatim summary of any single negotiation document. It reconstructs early-stage bargaining logic from publicly reported conflict dynamics and subsequent negotiation outcomes.

3. Phase II: Hormuz and the Shift from Bilateral War to Systemic Bargaining

The Strait of Hormuz became the conflict’s pivotal bargaining mechanism. Once maritime access, energy flows, and third-party shipping exposure became central, the conflict no longer remained a narrow U.S.–Iran coercive exchange. It became a systemic negotiation over chokepoint governance.

The Guardian reported on May 22 that Qatar sent mediators to Tehran as talks over reopening Hormuz approached a critical stage. According to that report, the proposed memorandum would lead to 30 days of talks on Iran’s nuclear program, thereby deferring discussion of the U.S. demand that Iran hand over its highly enriched uranium stockpile.

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Hormuz changed the bargaining equation in three ways. First, it expanded the affected audience to Gulf states, Asian energy importers, maritime insurers, global traders, and third-party naval powers. Second, it altered sequencing: for Washington, reopening Hormuz became urgent enough to compete with nuclear sequencing as the immediate diplomatic priority. Third, it allowed Iran to transform defensive survival into institutional leverage by proposing managed passage, tolling, or route-control mechanisms.

Prior EPINOVA analysis distinguished between Iran’s selective restriction model and the U.S. universal port-access blockade, noting that both raised legal and systemic issues but differed in scope and systemic impact. Iran’s model was bounded and selective; the U.S. blockade externalized conflict costs onto neutral actors and global commerce.

The reported draft’s freedom-of-navigation clause is therefore strategically significant. It addresses the systemic chokepoint issue without necessarily resolving the deeper dispute over who has authority to shape passage rules.

Table 2. Hormuz as Bargaining Conversion Mechanism

Function	U.S. Interpretation	Iranian Interpretation	Systemic Effect
Maritime access	Freedom of navigation and reopening of global flows	Conditional passage and leverage over adversaries	Converts bilateral war into global chokepoint crisis
Legal framing	Opposition to tolling and coercive routing	Claim to regulate passage under crisis conditions	Moves dispute into maritime governance space
Economic impact	Reduce energy-market and shipping shock	Use energy exposure as bargaining pressure	Raises third-party stakes
Negotiation role	Immediate requirement for de-escalation	Core asset to trade for sanctions and guarantees	Makes Hormuz central to settlement architecture

Source: Author’s synthesis based on The Guardian’s May 22 reporting on Qatar-mediated talks over reopening the Strait of Hormuz, U.S. opposition to Iranian tolling or PGSA-style arrangements, and Gulf-state concerns over Iranian maritime control proposals.

Note: This table interprets Hormuz as a bargaining-conversion mechanism. It does not classify the legal status of Iranian or U.S. maritime actions; rather, it identifies how maritime control became a source of systemic bargaining leverage.

4. Phase III: Nuclear Sequencing and the Deferral of the Hardest Issue

The nuclear file remained central, but its function changed. The issue did not disappear; it was sequenced.

In early and mid-conflict diplomacy, U.S. demands reportedly emphasized enrichment restrictions and control over highly enriched uranium. By May, reporting suggested movement toward a memorandum framework that would stabilize hostilities while creating space for more detailed nuclear negotiations. Reuters reported on May 23 that Trump said a final agreement would prevent Iran from obtaining a nuclear weapon and ensure that Iran’s enriched uranium would be handled satisfactorily.

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The Guardian’s May 22 reporting suggested that the proposed memorandum would lead to 30 days of further dialogue on Iran’s nuclear program and defer discussion of the U.S. demand that Iran surrender its highly enriched uranium stockpile. The same report noted that Russia had offered to receive the stockpile, while Iran said it would downblend the material inside Iran.

For the United States, nuclear sequencing reflected objective compression. The hardest demand—physical control or removal of enriched uranium—became difficult to enforce as a precondition for de-escalation. For Iran, nuclear sequencing reflected leverage preservation. By resisting immediate external control over enriched uranium, Iran retained a bargaining asset for the next stage.

Deferral is not the same as concession. It is a bargaining technology. It allows both sides to preserve incompatible claims while creating an interim path out of immediate escalation.

Table 3. Nuclear Demand Evolution

Stage	U.S. Position	Iranian Position	Bargaining Result
Early conflict	Strategic degradation of nuclear capability	Resist imposed settlement	Nuclear issue embedded in coercive war aims
Mid-conflict	Long-duration enrichment limits and stockpile control	Limited or conditional nuclear concessions	Dispute shifts to duration and sequencing
Late May	MOU framework and follow-on talks	Retain nuclear sovereignty; resist immediate stockpile removal	Nuclear issue deferred rather than resolved
Reported final draft stage	Unresolved issues to be negotiated within seven days	Compliance linked to sanctions relief and broader guarantees	Procedural track replaces immediate substantive settlement

Source: Author’s synthesis based on Reuters reporting that U.S. negotiators remained focused on preventing Iran from obtaining a nuclear weapon and ensuring satisfactory handling of enriched uranium; supplemented by The Guardian’s reporting that the proposed Hormuz memorandum would delay the U.S. demand for Iran to surrender highly enriched uranium while opening a follow-on nuclear dialogue.

Note: The “reported final draft stage” reflects unconfirmed draft terms and should not be treated as signed agreement language. The table tracks the sequencing of the nuclear issue rather than the final resolution of nuclear obligations.

5. Phase IV: Iranian Bargaining-Package Expansion

Iran’s negotiating behavior should not be interpreted only as resistance. It became a form of bargaining-package expansion.

Reuters reported on May 18 that Iran had sent a new peace proposal via Pakistan and that a Pakistani source confirmed Islamabad had transmitted it to Washington. The reported Iranian offer focused on ending the war, reopening Hormuz, and partial release of Iranian assets. The Guardian reported on May 22 that Iran emphasized postponing nuclear talks and focusing first on permanent cessation of hostilities, phased sanctions relief, unfreezing frozen assets, compensation for U.S.–Israeli war damage, and commitments not to resort to force.

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This expansion served four purposes. It prevented negotiation from becoming a narrow nuclear-for-ceasefire exchange. It linked Iranian concessions to economic and security compensation. It made war termination conditional on a broader architecture of maritime access, sanctions relief, non-aggression assurances, sovereignty language, and future nuclear sequencing. It also allowed Iran to turn survival itself into a bargaining claim.

Iran's bargaining-package expansion does not mean Tehran achieved its objectives. It means Iran prevented the agenda from being defined solely by U.S. preferences.

Table 4. Iranian Bargaining-Package Expansion

Iranian Demand Area	Strategic Meaning
Broad cessation of hostilities	Prevents a narrow U.S.–Iran ceasefire that leaves regional fronts active
Sanctions relief	Converts military de-escalation into economic recovery
Oil-export restoration	Links settlement to regime revenue and macroeconomic stabilization
End of blockade	Seeks removal of wartime economic pressure mechanism
Security guarantees	Attempts to convert ceasefire into non-attack architecture
Compensation	Builds a responsibility and legitimacy frame
Nuclear-stockpile retention or controlled sequencing	Preserves sovereign leverage for later negotiation
Hormuz management	Attempts to institutionalize chokepoint leverage
U.S. troop withdrawal	Expands settlement from crisis management to regional order

Source: Author's synthesis based on Reuters reporting on Pakistan-mediated exchanges and Iranian proposals, together with reporting from The Guardian and Al Jazeera on Iranian demands concerning sanctions relief, frozen assets, Hormuz supervision, oil exports, and broader cessation of hostilities.

Note: The listed items represent reported Iranian bargaining positions and inferred settlement demands, not confirmed provisions of an accepted agreement. The table is designed to show bargaining-package expansion rather than formal treaty text.

6. The Alleged Pakistan-Mediated Draft: Procedural Stabilization Rather Than Final Settlement

A reportedly circulated Pakistan-mediated draft agreement, attributed in some regional and secondary reporting to Al Arabiya, outlines a ceasefire-centered framework rather than a comprehensive final settlement. Because the document has not been formally released by the United States, Iran, or Pakistan, it should be treated as an alleged or reported draft rather than a confirmed agreement.

Nevertheless, the reported terms are analytically significant because they indicate the direction of late-stage bargaining. The draft reportedly includes eight core elements.

The structure of this draft is important. It does not appear to resolve the core dispute over Iran's enriched uranium stockpile, the long-term status of enrichment, U.S. regional posture, compensation, or the legal status of any Iranian maritime authority over Hormuz. Instead, it creates a procedural architecture for de-escalation.

This supports the central argument of this brief: by Day 85, the conflict had moved from maximal outcome bargaining to managed process bargaining. The United States was no longer positioned to obtain all high-end demands as immediate preconditions for de-escalation. Iran had not secured full recognition of its maximal claims, but it had moved the negotiation toward broader sequencing that included sanctions relief, sovereignty language, and follow-on talks.

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The alleged draft therefore represents neither U.S. capitulation nor Iranian victory. It is better understood as a procedural stabilization framework designed to stop the escalation cycle while preserving unresolved leverage for later negotiation.

Table 5. Reported Pakistan-Mediated Draft Terms and Strategic Meaning

Reported Draft Term	Strategic Meaning
Immediate, comprehensive, and unconditional ceasefire across land, sea, and air domains	Moves negotiation from coercive escalation to system-wide suspension of hostilities
Mutual commitment not to target military, civilian, or economic infrastructure	Freezes major escalation pathways and reduces infrastructure-warfare risk
Cessation of military operations and inflammatory media activity	Extends ceasefire logic into the information domain
Respect for sovereignty, territorial integrity, and non-interference	Provides a sovereignty frame while limiting expansionist interpretations
Freedom of navigation in the Gulf, Strait of Hormuz, and Gulf of Oman	Addresses the principal chokepoint issue without recognizing unilateral tolling authority
Joint monitoring and dispute-resolution mechanism	Provides a procedural substitute for trust and external enforcement
Negotiations on unresolved issues within seven days	Defers hard issues while preventing open-ended postponement
Phased lifting of U.S. sanctions in exchange for Iranian compliance	Converts sanctions from coercive pressure into conditional bargaining currency

Source: Author’s synthesis based on secondary reporting of an alleged Pakistan-mediated draft agreement attributed to regional media reporting; the document has not been formally released by the United States, Iran, or Pakistan.

Note: Because the alleged draft has not been formally released by the United States, Iran, or Pakistan, its provisions are treated as reported draft terms rather than confirmed agreement language.

7. Objective Compression and Leverage Institutionalization

By Day 85, the negotiation had moved from maximal settlement toward a more limited and procedural bargaining structure. The United States compressed its objectives from coercive termination toward damage limitation and procedural control. Iran, meanwhile, sought to institutionalize surviving wartime leverage by embedding Hormuz access, nuclear sequencing, sanctions relief, sovereignty language, and security guarantees into the settlement agenda.

This was not equivalent to a decisive victory or defeat for either side. The United States retained strike capacity, sanctions authority, naval power, and diplomatic leverage, but its ability to impose a maximal political settlement had narrowed. Iran remained under significant military and economic pressure, but its survival as a negotiating actor allowed it to convert pressure points into bargaining claims.

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7.1 U.S. Objective Compression

Five mechanisms drove U.S. objective compression.

First, the marginal utility of military pressure declined. Additional strikes could impose damage, but they could not automatically produce Iranian acceptance of enriched-uranium stockpile removal, recognized U.S. control over maritime flows, or a politically durable settlement.

Second, Hormuz created system-wide externalities. The more maritime flows were disrupted, the more third parties became stakeholders in rapid stabilization rather than maximal coercion.

Third, coalition and partner constraints narrowed U.S. flexibility. U.S. and Israeli strategic logics were not identical. Prior EPINOVA analysis argued that Washington prioritized control sustainability, while Israel prioritized deterrence restoration through visible coercive credibility. This divergence created different thresholds for cost, duration, and acceptable escalation.

Fourth, nuclear sequencing constrained maximal demands. Demanding immediate stockpile surrender risked blocking a wider de-escalation package. Deferring the issue preserved the possibility of agreement while leaving the hardest dispute unresolved.

Fifth, mediators could facilitate talks but not enforce compliance. Pakistan, Qatar, Oman, Turkey, Egypt, and others could transmit messages and provide diplomatic cover, but they could not compel restraint by the primary parties. Under these conditions, ceasefire design became a substitute for trust.

7.2 Iranian Leverage Institutionalization

Iran's parallel strategy was not simply to resist U.S. pressure, but to convert surviving leverage into settlement architecture.

First, survival became bargaining leverage. By remaining a coherent negotiating actor after sustained military and economic pressure, Iran preserved the ability to shape the sequencing and scope of talks. Its survival under pressure allowed Tehran to resist a narrow nuclear-first settlement and insist on broader termination conditions.

Second, Hormuz became an institutional claim. Iran attempted to move from temporary disruption or selective restriction toward a more durable role in shaping maritime access. Even if U.S. and Gulf actors rejected tolling or unilateral routing mechanisms, the issue itself forced Hormuz governance into the negotiation package.

Third, nuclear sequencing became a retention strategy. By resisting immediate external removal of enriched uranium and linking nuclear concessions to broader ceasefire, sanctions, and security terms, Iran preserved the nuclear file as leverage for follow-on talks rather than surrendering it as a precondition for de-escalation.

Together, these dynamics produced a compression–institutionalization pattern: the United States narrowed its immediate objectives to stabilize the system, while Iran broadened the settlement agenda to preserve and formalize surviving leverage.

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8. Why Neither Side Achieved Maximal Objectives

A balanced assessment should avoid describing the outcome as either U.S. retreat or Iranian success. Both sides retained leverage; neither converted leverage into a final settlement.

By Day 85, neither side appeared to have converted its maximal objectives into binding settlement terms. The emerging framework centered on ending or suspending the war, securing Hormuz, and opening a broader negotiation window, rather than resolving all substantive disputes immediately.

The result is not victory, but bargaining incompleteness. The draft, if accurate, would stabilize the conflict process without resolving the conflict structure. It would reduce active escalation while preserving disputes over enriched uranium, enrichment restrictions, sanctions architecture, Hormuz governance, U.S. regional posture, and Israel-related escalation dynamics.

Table 6. Maximal Objectives vs. Reported Draft / Day 85 Reality

Actor	Maximal Objective	Reported Draft / Day 85 Reality
United States	Iranian unconditional acceptance or coercive termination	Immediate comprehensive ceasefire, not surrender
United States	Full and immediate control of Iran’s highly enriched uranium	Nuclear-stockpile issue reportedly deferred to follow-on negotiations
United States	Reopening Hormuz without Iranian bargaining gain	Freedom of navigation included, but within negotiated framework
United States	Continued sanctions as coercive leverage	Phased sanctions relief reportedly linked to Iranian compliance
United States	Prevention of Iranian maritime institutionalization	Draft protects navigation but does not clearly resolve PGSA/tolling dispute
Iran	Full sanctions relief	Only phased relief tied to compliance
Iran	Recognition of Hormuz management authority or tolling rights	Freedom-of-navigation language limits unilateral Iranian claims
Iran	Security guarantees and non-attack assurance	Mutual non-targeting and sovereignty language partially address this
Iran	Removal of all U.S. military pressure	No confirmed U.S. withdrawal or force rollback
Iran	Permanent settlement of all disputes before nuclear concessions	Unresolved issues moved into talks within seven days

Source: Author’s comparison based on Reuters reporting that late-stage talks involved a three-phase approach: ending the war, securing the Strait of Hormuz, and opening a broader negotiation window; supplemented by reported draft terms summarized in secondary reporting.

Note: “Maximal objectives” are analytical reconstructions from public bargaining positions and reported negotiating demands. They should not be read as formal treaty language or confirmed official red lines.

9. Analytical Model: Compression–Expansion Bargaining Under Systemic Pressure

The 85-day conflict can be modeled as a compression–expansion bargaining process. The United States compressed its objectives from coercive termination toward ceasefire-first sequencing and procedural control. Iran expanded the settlement agenda by linking de-escalation to sanctions relief, Hormuz governance, nuclear sovereignty, and security guarantees.

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This model suggests that bargaining power in systemic conflict is not determined only by military capability. It depends on the ability to convert military pressure, economic exposure, chokepoint control, nuclear ambiguity, and time into settlement architecture.

Table 7. Compression–Expansion Bargaining Model

Dimension	U.S. Objective Compression	Iranian Leverage Institutionalization
Initial posture	Maximal coercion	Strategic resistance
War termination	From coercive termination to ceasefire-first sequencing	From refusal of imposed terms to permanent cessation demands
Nuclear issue	From immediate pressure to sequenced handling	From rejection of external removal to sovereign retention/downblending claims
Hormuz	From reopening demand to anti-tolling and freedom-of-navigation clauses	From disruption to attempted governance leverage
Sanctions	From coercive instrument to conditional bargaining currency	From relief demand to phased compliance exchange
Security guarantees	Preserve U.S. military option	Seek non-attack commitments and sovereignty language
Information domain	Maintain escalation pressure and political messaging	Seek cessation of inflammatory media activity
Institutional mechanism	Monitoring and dispute resolution as control tools	Monitoring and dispute resolution as protection against unilateral attack
Strategic logic	Damage limitation and procedural control	Leverage conversion and settlement broadening

Source: Author’s analytical model based on public reporting from Reuters, The Guardian, Al Jazeera, and reported draft summaries; supplemented by EPINOVA’s prior conceptual work on cost imposition, ceasefire under non-enforcement, and systemic bargaining under pressure.

Note: This model is not a verbatim summary of a single negotiation document. It synthesizes observed bargaining movement into two conceptual mechanisms: U.S. objective compression and Iranian leverage institutionalization.

10. Policy Implications

- **Treat Hormuz as a governance problem, not only an access problem.** A durable settlement requires more than reopening shipping lanes. It must clarify how passage rules are defined, how transit continuity is guaranteed, how tolling or routing claims are rejected or managed, and how third-party commercial exposure is reduced.
- **Separate nuclear sequencing from nuclear abandonment.** The nuclear issue should be broken into stages: declaration, freeze, monitoring, stockpile disposition, enrichment limits, and compliance architecture. Treating all components as a single indivisible demand increases the risk of negotiation failure.
- **Build ceasefire design around monitoring, reversibility, and dispute resolution.** A ceasefire without force-posture constraints can become a recovery or redeployment window. Any interim arrangement should include verifiable exchanges, attribution procedures, dispute-resolution channels, and reversible sanctions or security measures.

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- **Manage U.S.–Israeli threshold divergence.** Washington’s priority of control sustainability and Israel’s priority of deterrence restoration create different escalation thresholds. Any settlement architecture must account for Israeli incentives; otherwise, U.S.–Iran diplomacy may be disrupted by parallel regional fronts.
- **Treat sanctions relief as conditional sequencing leverage, not a one-time concession.** For Iran, sanctions relief and oil-export restoration provide evidence that de-escalation yields tangible benefits. For the United States, sanctions relief remains reversible leverage. Phasing, compliance benchmarks, and snapback design are therefore central to any agreement.

11. Limitations

This brief relies on publicly available reporting, reported draft summaries, and analytical synthesis. The alleged Pakistan-mediated final draft has not been formally released by the negotiating parties, so its provisions should be treated as reported draft terms rather than confirmed agreement language.

Reported negotiation leaks may reflect selective disclosure, signaling, or pressure tactics by interested parties. Some provisions may represent bargaining positions, trial balloons, or partial drafts rather than final accepted commitments.

This brief does not independently verify battlefield damage, nuclear-stockpile locations, or operational readiness. It assesses the bargaining structure as of Day 85, and its conclusions may change if an official agreement, renewed strike, Hormuz incident, or new disclosure alters the negotiation environment.

Conclusion

The 85-day conflict did not produce a clear bargaining winner. It produced a reconfigured negotiation space in which battlefield outcomes no longer translated directly into settlement control.

The United States retained military superiority but experienced objective compression. Its practical goals narrowed from coercive termination and strategic degradation toward damage limitation and procedural control: suspending hostilities, reopening Hormuz, managing the nuclear-stockpile issue, and preserving a politically usable exit framework. Iran, despite sustained pressure, pursued leverage institutionalization by expanding the settlement agenda around sanctions relief, oil-export restoration, sovereignty language, security assurances, nuclear sequencing, and Hormuz arrangements.

The reported Pakistan-mediated draft, if accurately described, reinforces this shift toward ceasefire-first sequencing. Its emphasis on immediate ceasefire, mutual non-targeting, freedom of navigation, joint monitoring, follow-on talks within seven days, and phased sanctions relief suggests that the hardest issues were not resolved, but moved into a managed procedural track.

The broader implication is that military dominance may initiate coercion, but system-level leverage shapes whether coercion can be converted into settlement. Under conditions of cumulative cost pressure, chokepoint exposure, nuclear ambiguity, alliance divergence, and weak enforcement capacity, negotiation becomes less a path to surrender than a struggle over how unresolved leverage is organized.

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Appendix A. Chronology of Reported Bargaining Positions, Days 1–85

A.1 Phase I: Coercive Onset and Early Iranian Resistance, Days 1–30

Table A1. Chronology of Phase I Developments

Day / Date	Event	Reported Bargaining Relevance	Source
Pre-Day 1 / Feb. 25	U.S. expands Iran-related sanctions over oil sales and weapons programs.	Establishes sanctions as a coercive bargaining instrument before the full 85-day negotiation arc.	Reuters, Feb. 25, 2026; U.S. Treasury, Feb. 25, 2026
Day 1 / Feb. 28	U.S.–Israel military campaign against Iran begins, according to later reporting.	Marks the coercive onset of the conflict and the initial assumption that military pressure could shape settlement terms.	Reuters, May 23, 2026
Days 1–10 / Late Feb.–Early Mar.	Initial phase dominated by coercive military pressure and Iranian retaliation.	Creates the first asymmetry: U.S. coercive termination logic versus Iranian survival-based resistance.	Reuters, May 23, 2026; EPINOVA PB-16
Day 26 / Mar. 25	Iran rejects a U.S. ceasefire plan and submits its own proposal.	Early evidence that Iran would not accept externally imposed sequencing.	The Guardian, Mar. 25, 2026

A.2 Phase II: Ceasefire Proposals and Nuclear-Duration Bargaining, Days 31–60

Table A2. Chronology of Phase II Developments

Day / Date	Event	Reported Bargaining Relevance	Source
Day 38 / Apr. 6	U.S. and Iran receive a plan for immediate ceasefire and ending hostilities.	First major reported structured ceasefire proposal linking de-escalation to broader negotiation.	Reuters, Apr. 6, 2026
Day 43 / Apr. 11	Ceasefire and settlement discussions continue under conditions of weak enforcement.	Reinforces the non-enforcement problem: mediators can facilitate talks but cannot compel compliance.	EPINOVA PB-25
Day 46 / Apr. 14	Public reporting highlights U.S.–Iran disagreement over duration of enrichment restrictions.	Nuclear dispute shifts from binary disarmament to duration bargaining.	Al Jazeera, Apr. 14, 2026
Day 51 / Apr. 19	Tehran reportedly has “no plans to participate” in new talks.	Shows fragility of diplomatic sequencing and Iranian resistance to perceived U.S.-defined terms.	The Guardian, Apr. 19, 2026
Day 59 / Apr. 27	U.S. reviews latest Iranian proposal to end war stalemate.	Indicates Iran’s attempt to submit counter-proposals rather than accept a narrow U.S. framework.	Reuters, Apr. 27, 2026
Day 60 / Apr. 28	Trump reportedly unhappy with latest Iranian peace proposal.	Signals continuing mismatch between U.S. required concessions and Iranian offer structure.	Reuters, Apr. 28, 2026

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A.3 Phase III: MOU Architecture and Bargaining-Package Expansion, Days 61–80

Table A3. Chronology of Phase III Developments

Day / Date	Event	Reported Bargaining Relevance	Source
Day 63 / May 1	U.S. dissatisfaction with Iranian proposal and Hormuz disputes are reported.	Hormuz becomes a central obstacle to settlement, not merely a battlefield side issue.	Reuters, May 1, 2026
Day 68 / May 6	Axios reports U.S. and Iran are closing in on a one-page MOU to end the war.	Marks movement toward framework bargaining and away from immediate comprehensive settlement.	Axios, May 6, 2026
Day 69 / May 7	U.S. proposals reportedly include a defined enrichment moratorium and framework terms.	Nuclear issue becomes a sequenced component of a wider settlement architecture.	Al Jazeera, May 7, 2026; Reuters, May 7, 2026
Day 80 / May 18	Iran transmits a revised proposal via Pakistan.	Iranian bargaining-package expansion: ending war, reopening Hormuz, partial asset release.	Reuters, May 18, 2026

A.4 Phase IV: Ceasefire-First Sequencing and Reported Draft Terms, Days 81–85

Table A4. Chronology of Phase IV Developments

Day / Date	Event	Reported Bargaining Relevance	Source
Day 81 / May 19	Reporting indicates Iranian proposal includes reparations, U.S. troop withdrawal, and broader terms.	Iran expands settlement package beyond ceasefire and nuclear terms.	Reuters, May 19, 2026
Day 82 / May 20	Trump signals willingness to wait for a few days to get the “right” Iran deal.	Suggests U.S. preference for a negotiated outcome while retaining military escalation threat.	Reuters, May 20, 2026
Day 83 / May 21	Oil prices fall amid uncertain prospects for a U.S.–Iran deal.	Shows market sensitivity to negotiation progress and Hormuz-related uncertainty.	Reuters, May 21, 2026
Day 83 / May 21	Iranian-linked reporting claims draft agreement mediated by Pakistan.	Supports alleged-draft chronology but requires caution due to lack of official release.	InvestingLive, May 21, 2026
Day 84 / May 22	Qatar sends mediators to Tehran as Hormuz talks approach climax.	Hormuz becomes the immediate sequencing issue; nuclear talks reportedly pushed into a 30-day follow-on track.	The Guardian, May 22, 2026
Day 84 / May 22	Reuters reports Qatari negotiating team in Tehran to help secure U.S.–Iran deal.	Confirms Qatar’s role in late-stage mediation.	Reuters, May 22, 2026
Day 84 / May 22	Regional reporting describes a possible Pakistan-mediated draft deal that could be announced within hours.	Alleged final draft terms enter public information space.	Al Arabiya, May 22, 2026
Day 84 / May 22	Times of Israel summarizes Saudi network reporting on “final draft” of U.S.–Iran deal.	Provides secondary confirmation of regional circulation of alleged draft, while noting sides had not approved it.	Times of Israel, May 22, 2026

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Table A4. Chronology of Phase IV Developments (Cont.)

Day / Date	Event	Reported Bargaining Relevance	Source
Day 84 / May 22	Rubio says there is some progress, but talks are not complete.	Indicates unresolved gaps despite reported draft momentum.	Al Arabiya, May 22, 2026
Day 85 / May 23	U.S., Iran, and Pakistan report progress on talks aimed at ending the war.	Supports the brief’s “ceasefire-first sequencing” claim.	Reuters, May 23, 2026
Day 85 / May 23	Trump says negotiators are getting closer to an Iran deal.	Indicates U.S. movement toward a deal while maintaining nuclear red lines.	Reuters, May 23, 2026
Day 85 / May 23	Iran’s top negotiator says Tehran will not compromise in talks.	Shows that Iranian leverage and red lines remain active despite progress.	Reuters, May 23, 2026
Day 85 / May 23	AP reports Iran and the U.S. are close to an understanding aimed at ending the war.	Confirms wider reporting convergence around near-term understanding, not final settlement.	Associated Press, May 23, 2026
Day 85 / May 23	Axios reports U.S. and Iran are close to a deal to end war.	Supports late-stage MOU / understanding narrative.	Axios, May 23, 2026
Day 85 / May 23	Reuters publishes assessment asking whether Trump is losing the Iran war.	Provides retrospective framing that tactical superiority had not automatically produced political settlement.	Reuters, May 23, 2026

Appendix Note: This chronology summarizes selected reported bargaining positions and negotiation-relevant developments across the 85-day conflict. It is not a complete operational chronology of military events. Entries are selected for relevance to bargaining positions, negotiation sequencing, ceasefire design, Hormuz governance, nuclear-stockpile handling, sanctions relief, and mediator activity. Because some draft-related reporting involved contested attribution and no alleged draft has been formally released by the negotiating parties, all draft provisions are treated as reported and unconfirmed unless officially published or acknowledged by the United States, Iran, Pakistan, or other directly involved mediators.

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