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Iran, Europe and the US – new approaches to nuclear diplomacy

Meeting report
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Introduction

In January 2025, just a few days after Donald Trump was inaugurated for his second Presidential term, the European Leadership Network (ELN), with support from the Rockefeller Brothers Fund (RBF), convened a roundtable to discuss ways forward for a resumption of Iran-US nuclear negotiations. The roundtable brought together a range of European, American, Asian, and Middle East experts who debated the role of Gulf actors in developing a new deal, Iran's shift in priorities under the reformist leadership of President Masoud Pezeshkian, and the implications of the changes in the regional architecture, including Syria and Lebanon, as a result of the war in Gaza. Critically, a theme that ran throughout the meeting was Trump's own goals for a deal and his proclivity for quick victories that validate his presidential capacity to surprise and achieve the unexpected. As the JCPOA approaches its tenth year and expiration, the White House is sending clear signals vis other conflicts (Ukraine, Gaza) that diplomacy is the only way forward, suggesting a deal between the US and Iran could be reached.

Panel experts highlighted six areas of opportunity:

US priorities for a new agreement: The new Trump administration, despite its focus on acute areas of conflict such as Ukraine and Gaza, has reached out to Iran's Supreme Leader Ali Khamenei to begin negotiations on a 'Verified nuclear peace agreement', a clear indication that Iran nuclear talks are a top US priority. Yet Khamenei earlier scotched engagement when Trump reinstated the policy of maximum pressure in a National Security Presidential Memorandum (NSPM). If and when negotiations do take shape, the talks will likely be bilateral, emerge from back-channel preparation, and enable the US President to claim a deal as a victory and landmark.

Iran's openness to negotiations: Economic malaise, the loss of Syria, and the erosion of Hezbollah are contributing to Iran's openness to begin talks with Trump. However, Tehran remains cautious of his mercurial agenda, particularly following his spat with Ukrainian president Volodymyr Zelensky and his suggestion that Russian President Vladimir Putin act as a mediator. President Pezeshkian, elected on his promise to negotiate with the US, has backtracked in line with Khamenei's directive. However, this could change, as a reformist government offers the Supreme Leader cover, as well as options in supporting moves toward a new deal.

Europe's role in negotiations: Even if final talks are bilateral, the EU is well positioned to help jumpstart the process, as Iran's Supreme Leader has not closed off negotiating initial steps with Europe. Further, the EU can provide technical input in the absence of specialist experience among Trump officials.

The EU's activation of snapbacks: The EU is uniquely positioned to trigger snapbacks and could use them as leverage to push forward the negotiations. This could be as early as April to enable deal-making to start prior to the JCPOA's expiry or as late as September, before limits on Iran's nuclear programme permanently sunset.

Gulf States' Contribution: Ill-disposed toward the original JCPOA because they were shut out of the talks, Gulf states support a revised deal and are keen to be part of new negotiations. This could lead to a broader diplomatic and economic agreement that directly engages the Gulf neighbourhood, something Iran appears to favour., especially if Saudi Arabia is tapped to mediate.

Israel and the prospects of an outright attack: Israeli Prime Minister Netanyahu is keen to militarily obliterate Iran's nuclear facilities but will unlikely do so without Trump's support. Though Trump's letter to Khamenei stated clearly that a military option remained on the table, a critical window has opened for negotiations between the US and Iran, despite Israeli sabre-rattling. In Israel's view, Iran is ripe for attack after being weakened by the shift in regional architecture since the Gaza War and the IDF's attacks on its military infrastructure. Yet, as Iran has yet to reach breakout even though it continues to near-threshold status, Netanyahu's hands are tied in light of Trump's disinclination to support war.

Action points

The meeting's strategy discussion was structured around the following action points:

- Identify common areas of compromise and new ways into nuclear diplomacy
- Advance new thinking on linking different challenges and arenas
- Provide opening thoughts on new structures for a deal or a larger regional agreement
- Offer insights on Europe's positioning
- Assess prospects for a Saudi-Israel-US security agreement
- Consider Israel-Iran military confrontation scenarios

To contextualise the exchange, which focused on the significant symbolic and material shifts since the outbreak of the Gaza War in October 2023 and the subsequent change in administration in Washington, it is worth noting, in addition to President Trump's March 4, 2025 letter to the Supreme Leader, the following key developments since the roundtable convened:

- February 3, Prime Minister Benjamin Netanyahu visits as the first foreign dignitary to Trump's White House. Trump recasts Gaza as a US project and states Palestinians will permanently move into neighbouring lands. Iran is not mentioned.
- February 7, Supreme Leader Ali Khamenei rejects negotiations with the US, calling them 'not rational, intelligent or honorable'. Foreign Minister Araghchi declares, 'Iran is ready to negotiate with the United States but not under the "maximum pressure" strategy'. Iran's UN Mission in March states, 'If the objective of negotiations is to address concerns vis-à-vis potential militarisation of Iran's nuclear programme, such discussions may be subject to consideration'.
- On March 3, Mohammad Javad Zarif, Iran's Vice President for Strategic Affairs and previously Foreign Minister and chief negotiator for the JCPOA, under pressure from hardliners, presents his resignation for the second time, removing the top expert from the nuclear negotiating team.

Debate 1: Nuclear negotiations between the US and Iran

As the JCPOA reaches the tenth year since it was signed by Iran, the US and the EU, its constraints on Iran's nuclear programme - many still active despite the US withdrawal from the deal in 2018 - are set to expire in October 2025. All three signatories are considering their options as the deadline approaches, including a snap-back of sanctions by the EU, and a resumption of substantially different topics of negotiation by both the US and Iran.

The first debate by the meeting's experts focused on how a nuclear negotiation would be framed, and launched. There was general agreement on three main points: a) the JCPOA in its original form would not be revived; b) there is a misalignment in priorities in the US and Iranian agendas; c) the Trump administration would require several months to establish a plan, put in place key negotiators, and build expertise, as well as trust among contacts.

Disagreement arose over:

- a) how long an opening there was for the two sides before Iranian grand-standing or Israeli pressure might narrow the window for talks;
- b) the EU's likelihood of exercising snapbacks, and its role either in jump-starting or in conducting the technical elements of the negotiations;
- c) Trump's interest in the issue as an opportunity for a photo-op or justification for a Nobel Peace Prize;
- d) the regional dimension, in particular the role of Gulf states.

It was generally agreed that the JCPOA, even if it was awarded a different name, would not be revived.

US priorities for a new agreement. With both Iran and the US contending that the format of the JCPOA is not fit for purpose, it is likely talks would start from a tabula rasa, with significant weight placed on other issues such as Iran's missile programme and regional threats, as well as economic measures guaranteeing sanctions relief.¹ Based on Trump's opportunism and Iran's indications that it would meet face-to-face (if terms were right), a bilateral dialogue between Trump and Pezeshkian could be in the offing, although as one US expert noted, Trump's impatience with details suggests he would appear for the photo-op only once the groundwork was laid and the deal ready to sign. As such, Trump is focused on raising the pressure on Iran as a means to force a deal, and if Iran doesn't cooperate, Trump could lose interest.

Iran's openness to negotiations. From the perspective of leadership and nuclear decision-making, the situation appears propitious: as in the past, a reformist

¹ A survey (February 2025) conducted in Iran by Al-Jazeera indicates a majority of Iranian government officials, diplomats and representatives are open to negotiations that include missiles and other issues, in exchange for a secure guarantee of sanctions relief.

president, as in the case of Pezeshkian, offers the Supreme Leader room for manoeuvre. If negotiations fail, or don't pan out as expected, Khamenei can blame the reformists, which he can't do if a hardliner is president. With a reformist president in post, he is more able to counter conservative critics and give direction to Ali Shamkhani, currently the manager of the nuclear file from within the Supreme Leader's Office, and offer openings for negotiation. Thus, the reformist administration, which includes Foreign Minister Abbas Araghchi, previously a key negotiator on the JCPOA, and Pezeshkian, who ran on a platform promoting sanctions relief through negotiations, provides the Supreme Leader opportunity for coherent decision-making that can sustain various initiatives that may or may not prove fruitful. In sum, Iran is prepared for negotiations, and despite Khamenei's recent remarks dampening expectations in response to Trump's resumption of maximum pressure, it has not been this open to talks since the launch of the initial JCPOA negotiations, there being comments from both hawks and reformers in the press indicating that sanctions relief is a policy worth pursuing in the face of Iran's economic woes and that talks under the right circumstances could be a solution.²

Debate 2: Europe's contribution

The second debate centred on which actors, apart from the US and Iran, would take part and how their roles would differ. Specifically, how the EU, a critical player in the original JCPOA negotiations, and mediator for the follow-up talks initiated by US President Biden, could promote talks with other parties, including Gulf leaders, while bringing its own technical experience to bear. There was agreement that the EU was willing to work with the US to create a nuclear programme off-ramp for Iran, as long as it was not also designed to engineer regime change. It was agreed that energy should be spent on facilitating the US-Iran dialogue rather than formulating a new UN resolution. Experts also agreed that even in a bilateral set of negotiations, the EU could add critical and more comprehensive input, including in regards to its unique capacity to activate snap-backs.

Experts differed in their views regarding how effective the EU would be in light of the growing Western divide and Europe's strong alignment with Israel during the Gaza War.

The EU's role and whether (or when) it could activate snapbacks. One expert noted, 'The US cannot activate snapbacks' as they are no longer members of the JCPOA. It is a technicality that actually matters'. How soon or why the EU would activate the snapbacks was hotly debated, although it was agreed that time was of the essence.

One scenario viewed Europe initiating snapbacks as soon as April. Snapbacks would spur an Iranian response, possibly withdrawal from the NPT, a threat Tehran has made in the past. However, the NPT drawdown takes time, which could provide a window for hard negotiations to resume.

² See ELN press reports, December 2024, January 2025

A second scenario foresaw either Israel or Iran (or both) instrumentalising a crisis that would prompt Trump to push the Europeans to activate snapbacks. This could include Israeli direct aggression toward Iran or an uptick in European citizens unjustly being detained in Iran. Europe, noted an expert, would most probably wish to avoid being cornered and, instead, try to pivot to a political track before any such crisis emerged. Arguing that a sword is currently hanging over Iran as the months to JCPOA expiration approach, several experts observed that Tehran knows the contours of any potential diplomatic track but is acting cautiously in the face of Washington's mixed signals. On the other hand, if insufficient progress is made on nuclear diplomacy, the Europeans would either activate snapbacks by mid-September, just before the expiry of the JCPOA limits, or alternatively, propose an extension of the sunsets clauses to force negotiations. From Iran's perspective, activating snapbacks would be harmful to any constructive negotiations and justify escalation, as they would constitute renewed economic and political pressure, something Iran has stated it will not accept as a premise for coming to the table.

Debate also centred on what value Europe would bring to the negotiations.

Europe's role in any emerging negotiations scenario. Agreement was widespread that the negotiations this time around would be primarily bilateral and yet more comprehensive than the JCPOA. They would include demands for economic guarantees from Iran's side and demands for regional security and constraints on Iran's missile programme from the US side. In light of multiple ongoing UN-brokered negotiating tracks (a legacy of the Biden years), UN General Secretary Gutierrez publicly stated that Iran should step forward, although there are indications that Tehran will not officially make a move until maximum pressure is eased, if even for just a few months, so talks can begin. With its record of not making concessions under sanctions or other pressure by the US and Europe, Tehran could wait too long for the right moment to open the door, while equally, Trump could misjudge the role of US economic and political pressure and turn the screw too tightly, raising the stakes beyond Iran's capacity to accept talks at all. On the other hand, if talks do start, experts agree that things can actually run fairly quickly and with momentum under Trump's leadership.

One expert contended that neither Iran, nor the US, would want the Europeans actively involved. Iran's rejection of direct talks with Washington after Trump left the JCPOA seems to have changed as Tehran has itself come to see the old deal as unviable. For Trump, on the other hand, it is unclear how seriously he takes Europe on security matters such as Iran. Although its track record on defence spending is undergoing a sudden shift in response to the cut in Washington's support to Ukraine, the US sees Putin's Russia, rather than Europe, as the more significant player in Iran's neighbourhood. Meanwhile, Trump's other foreign policy projects have no history of engaging third parties. More likely, it would be input from Gulf state leaders, who have complained in the past of being frozen out of the JCPOA. Several, particularly Saudi Arabia's Mohammed Bin Salman (MBS), are people Trump counts as friends, personal relationships being of importance in his administration.

Where the Europeans could offer real value to the nuclear negotiations, several experts contended, would be on the technical front, as they bring experience of past haggling over nuclear details that few in the current US administration can claim. Their input could be critical in finalising a workable long-term agreement and ensuring that Trump does not rush in to sign a quick, overly transactional deal that serves primarily to hand him the coveted photo op.

Alternatively, doubts were raised as to how much Europe might help jump-start negotiations, lay the groundwork, and encourage Trump to focus on the real issues at stake. In the view of a seasoned diplomat, the E3 (Germany, France and Britain) is well-placed to spearhead Iran nuclear talks within a wider context of regional security. By raising questions at this stage with Gulf officials around regional non-proliferation frameworks and possibly a regional safeguarding plan, they could revive the idea of a neighbourhood agreement that could operate similarly to the OSCE, incorporating within it a JCPOA formula that would be balanced by sanctions relief through regional trade arrangements. By appealing to Trump's Nuclear Prize ambitions, the E3 could ensure the focus was not on regime change (which it does not wish to support) but on promoting multi-track diplomacy to reach solutions with built-in economic and security guarantees. Calling this a 'Front Channel' to balance back-channel activity between Iran and the US, European powers could add substance and momentum to a project that might otherwise stagnate until events propel it forward.

Debate 3: The regional dimension

A significant change in perspectives on any forthcoming negotiations was the importance of regional engagement. Although the early JCPOA groundwork was facilitated by several Gulf states, most particularly Oman, it was never an inclusive arrangement. The personal relationship between Trump and the Gulf, the rapprochement between Saudi Arabia and Iran in the years since, and the weakening of Iran's proxies are recasting the aims and compromises that will determine the contours of a new deal. There was disagreement over how far the Gulf would go in establishing a non-proliferation regime for the neighbourhood, as the Gaza War had shifted priorities in the region's relationships with Israel, China, Russia and the US.

The position of Gulf States. None of the Gulf states wish to see a nuclear Iran (or even a powerful Iran), and MBS has clearly stated that if Iran gets a bomb, Riyadh will too. On the other hand, as one expert pointed out, Saudi Arabia has swapped confrontation with Iran for a softer policy, being content to rely on the US and the international community to contain Tehran as Riyadh pursues its own agenda of developing its Vision 2030, promoting regional stability, and obtaining security guarantees from Washington. Each Gulf state has its own agenda, and relationships with Iran and the Great Powers (Russia, China, the US) differ. Although the idea of a nuclear-free zone in the Gulf and a regional non-proliferation agreement hold appeal, support from GCC capitals remains muted in light of the expansion of the Gaza war and Israel's nuclear programme. The ongoing Gaza War has similarly paused progress on a US-brokered accord between Saudi Arabia and Israel. As long as Gaza

and the Palestine issue remain at crisis point, the Gulf states do not see the Iran nuclear issue as a driving priority and consider Iran's other threats, particularly its strategy of distributed militias, as having lessened due to recent events.

Israel and the prospects of an outright attack. With the Gaza War commanding the majority of Israel's attention, Netanyahu's oft-stated priority to get rid of Iran's nuclear programme has been, for the moment, overshadowed. Trump and Netanyahu share the view, as noted by one expert, that Iran should never be allowed a bomb, but their approach to ensuring that is the case appears to be diverging. Having never supported the JCPOA, Netanyahu sees the current situation, in which Iran's defences have been weakened, as offering the best opportunity for Israel to destroy its nuclear sites through direct attack. However, without US support, this option is problematic, as Netanyahu would be unlikely at this point to do anything 'that might anger President Trump'.

Three scenarios were mentioned as being on the table: a) an agreement between the US and Iran, which, even if it was considerably stronger than the current JCPOA, would not be palatable to Israel. Although it might be able to pressure the US administration to put red lines on specific actions by Iran, there would be little Israel could do but accept it, especially if Trump were to present it as a landmark agreement. b) Iran makes a decision to break out. Israel would expect the US to respond militarily, and were the US to hesitate, Israel would consider it intolerable to accept a nuclear Iran and would feel free to retaliate. These two options are the easiest for Israel to respond to. The third option, c) no US-Iran deal but no Iranian nuclear breakout either, would be the most difficult for Israel to face. Can it accept Iran as a threshold state if US-Iran talks fail? Unclear, too, would be whether Trump would give Israel any indication that it can use military force on its own against Iran – in light of his stated desire to avoid wars and his removal of many of the hawks, such as Brian Hook and Mike Pompeo, that previously promoted his administration's hard line. Would he provide Israel a yellow light to unilaterally attack (without overt US support) by offering it the kind of ammunition needed to destroy the Natanz and Fordo facilities, and protect Israel from any kind of Iranian retaliation?

A further factor is Trump's continued commitment to obtaining a Saudi-Israeli version of the Abraham Accords. Prospects for such a deal appear increasingly dim due to Israel's inability to meet one of Riyadh's firmest demands, namely the establishment of a Palestinian state. In this regard, Saudi Arabia and Iran share a common cause, and it is debatable whether Trump would compromise his relationship with Saudi Arabia by enabling a war in the Gulf. If Iran remains a threshold state without moving to weaponisation, the experts debated the purpose of the attack. One pointed out that at this stage, Iran's know-how, technological capacity and level of personnel capability would mean a revival of the nuclear programme after an attack could not be discounted. Rather than being a technical issue, weaponising is a political decision. Yet another expert maintained that though this may be the case, 'no Israeli government would be willing to take the risk of Iran becoming nuclear, even if that means only delaying the process'.

In sum

Prospects for a new round of US-Iran negotiations were generally viewed as propitious, most likely in a bilateral format, starting from a tabula rasa and bringing in multiple issues, including regional security and missile control, as well as stricter guarantees on sanctions relief. Trump, according to the experts, sees such a deal as promising for his aspirations of receiving a Nobel Prize and resetting US-Iran relations more broadly. Iran, it was agreed, was open to talks and, with the Reformists in power, more politically aligned to engage than it had been for some time.

Positioned to act as a 'front channel' to lay the foundations of a new dialogue, Europe was seen to enjoy significant leverage through its extensive experience negotiating with both parties, able to bring needed technical expertise and support separate diplomatic and back-corridor channels. What's more, regional actors are more keen to be involved during this round, something Europe can encourage and develop. Having recourse to the snap-back likewise offers Europe opportunity to push the negotiating agenda over the next several months and take advantage of the window, which at the moment is open to engage in substantive talks over a military fall-back.

Experts further agreed that for the moment, although Israel is ready to attack Iran, it does not have Trump's support to mount an operation yet. Instead, the US President is more committed to negotiations that can add lustre to his legacy, than a regional war.



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