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The United States and Iran Agree to End War – SITREP #40: June 18, 2026

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June 18, 2026

Scope Note

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| Key Findings

- U.S. President Donald Trump and Iranian President Masoud Pezeshkian signed a Memorandum of Understanding (MOU) on ending the war. The final terms strongly align with those previously outlined in ZeroFox’s SITREP report dated May 28, 2026.
- The MOU establishes a timeline for future talks on Iran’s nuclear program and sanctions relief, despite both sides almost certainly holding fundamentally different positions on most issues. It mandates a 60-day ceasefire extension to facilitate talks and the reopening of the Strait of Hormuz (SoH)—a timeline almost certain to be extended given the anticipated difficulty of negotiations.
- A durable solution regarding Israeli operations in Lebanon remains very unlikely as it necessitates that Iran restrain Hezbollah and the United States curb Israel. Along with divergent interpretations of the SoH reopening and sanctions relief, this impasse poses the primary short-term risk of conflict resurgence during the 60-day negotiation period.

Latest Details

U.S. President Donald Trump and Iranian President Masoud Pezeshkian signed the MOU on June 17, 2026, instead of waiting for the planned June 19 signing in Geneva, Switzerland.¹ The official text of the deal then began circulating among select media outlets.² Under its terms, both nations will reportedly lift their respective blockades of the SoH in exchange for a formal cessation of hostilities and a commitment to prioritize negotiations, starting with Iran’s nuclear program and sanctions relief.³

The terms of the MOU further demonstrate the United States is moving closer to Iran’s negotiating position, a trend ZeroFox highlighted in both our April 23 and May 28 SITREP reports.⁴⁵ This agreement very likely increases the economic incentives for Iran to relinquish control over the SoH, contingent upon a more robust commitment to denuclearization.

- The MOU addresses key Iranian demands, including the unfreezing of billions in assets, a waiver of sanctions on oil exports, and a comprehensive cessation of hostilities across all conflict zones—including Lebanon.
- While Iran has reiterated its pledge to forgo nuclear weapons and has agreed to address its enriched uranium stockpile, binding commitments remain deferred until future negotiations.⁶ The Trump administration likely accepted these terms because recent Iranian proposals have moved closer to the U.S. position on nuclear issues, despite necessitating certain U.S. concessions.

Sanctions and Nuclear Program

The MOU maintains that Iran must eliminate its highly enriched uranium but defers enforcement of this requirement. While Iran has recently shown flexibility regarding its

¹ [hXXps://www.cnn\[.\]com/2026/06/18/world/live-news/iran-war-trump-israel-lebanon](https://www.cnn.com/2026/06/18/world/live-news/iran-war-trump-israel-lebanon)

² [hXXps://www.nytimes\[.\]com/2026/06/17/us/politics/us-iran-agreement-deal-text.html](https://www.nytimes.com/2026/06/17/us/politics/us-iran-agreement-deal-text.html)

³ [hXXps://www.bloomberg\[.\]com/news/articles/2026-06-16/read-the-14-point-draft-memorandum-between-the-us-and-iran](https://www.bloomberg.com/news/articles/2026-06-16/read-the-14-point-draft-memorandum-between-the-us-and-iran)

⁴ Fragile Ceasefire – SITREP #38: May 28, 2026

⁵ Peace Talks Stall – SITREP #39: June 5, 2026

⁶ [hXXps://www.bbc\[.\]com/news/articles/c4gy700j0eko](https://www.bbc.com/news/articles/c4gy700j0eko)

nuclear program, it remains highly unlikely to accept the total elimination of its enriched uranium.

- A more likely long-term outcome would involve Iran pausing Iranian enrichment for a longer period of time (less than the U.S. demand of 20 years but more than Iran’s demand of three to 10 years), eliminating most of its existing enriched uranium, and permitting international inspections of its nuclear sites.

Upon the signing of the MOU, the United States will issue waivers for the export of Iranian crude oil, petroleum products and derivatives, and all associated services.⁷ Additional sanction relief will be conditioned on concrete nuclear commitments over the medium term.⁸ The full unfreezing of Iranian assets and comprehensive relief will likely be tied to either an Iranian commitment not to develop nuclear weapons or an enrichment pause. While this issue is unlikely to derail the MOU in the short term, the possibility that it hinders a more lasting commitment beyond the initial 60-day period remains high.

- Additionally, the MOU sets out the creation of a fund worth at least USD 300 billion for the “reconstruction and economic development” of Iran, in coordination with the United States’s regional partners. Disbursement of the funds will be conditioned on the completion of the final deal.⁹

Strait of Hormuz

Both sides have confirmed that the MOU will lead to the reopening of the SoH without specifying the terms, leaving open the possibility of contradictory interpretations. Iran is very likely to relax its control; however, it almost certainly maintains the ability to close the SoH again if it views U.S. obligations as not being met. For its part, the United States remains very unlikely to lift all sanctions without a long-term nuclear agreement and a significant reduction in Iranian control over the SoH.

- The reopening of the SoH is unlikely to be seamless. The MOU establishes that Iran will undertake a dialogue with Oman to “define the future administration and maritime services in the Strait of Hormuz.”¹⁰ The inclusion of the term “services” indicates that Iran will likely attempt to reframe the future collection of funds as a

⁷ [hXXps://www.cnn\[.\]com/2026/06/17/middleeast/us-iran-war-mou-text-intl](https://www.cnn.com/2026/06/17/middleeast/us-iran-war-mou-text-intl)

⁸ [hXXps://www.nytimes\[.\]com/2026/06/17/us/politics/us-iran-agreement-deal-text.html](https://www.nytimes.com/2026/06/17/us/politics/us-iran-agreement-deal-text.html)

⁹ *Ibid.*

¹⁰ [hXXps://www.cnn\[.\]com/amp/2026/06/17/iran-mou-deal-strait-hormuz-oman-toll.html](https://www.cnn.com/amp/2026/06/17/iran-mou-deal-strait-hormuz-oman-toll.html)

service fee rather than a “toll.” This will all but certainly face pushback from the United States.

- Iran will reportedly begin allowing the passage of commercial ships immediately after the signing of the MOU, while the United States will draw down its own blockade within 30 days. Iran will be required to begin demining operations within 30 days. International shipping lines will likely defer normalizing operations until both parties demonstrate clear adherence to the MOU.

Israel, Hezbollah, and Proxies

The MOU includes terms regarding a cessation of military operations across all conflict zones, including Lebanon. However, shortly after the deal’s announcement, senior Israeli officials—including Defense Minister Israel Katz—stated that Israel is not party to the agreement and will not withdraw from southern Lebanon. Meanwhile, regular Israeli military strikes against Hezbollah-related targets have continued.¹¹¹² For its part, Hezbollah temporarily ceased its attacks against Israeli forces after President Trump announced the signing of the agreement on June 15, 2026.¹³ However, the group seemingly resumed operations against Israeli targets on June 17, 2026.¹⁴¹⁵

- Iran maintains an unambiguous requirement that the ceasefire encompass all fronts—a condition that Israel almost certainly opposes. Throughout its recent ceasefire in Lebanon, Israel has reportedly refused to end military operations or withdraw from southern Lebanon, and both sides almost certainly remain far apart regarding a durable political solution.
- The deal is widely seen in and outside of Israel as a significant failure for Israeli Prime Minister Benjamin Netanyahu, as it fails to achieve any of the major goals

¹¹ [hXXps://www.timesofisrael\[.\]com/liveblog_entry/defense-minister-israel-staying-in-south-lebanon-if-iran-strikes-well-hit-it-with-full-force/](https://www.timesofisrael.com/liveblog_entry/defense-minister-israel-staying-in-south-lebanon-if-iran-strikes-well-hit-it-with-full-force/)

¹² [hXXps://www.bbc\[.\]com/news/articles/c7vyn17g832o](https://www.bbc[.]com/news/articles/c7vyn17g832o)

¹³ [hXXps://www.reuters\[.\]com/world/middle-east/hezbollah-has-not-carried-out-operations-since-iran-us-deal-hezbollah-official-2026-06-15/](https://www.reuters.com/world/middle-east/hezbollah-has-not-carried-out-operations-since-iran-us-deal-hezbollah-official-2026-06-15/)

¹⁴ [hXXps://www.haaretz\[.\]com/israel-news/israel-security/2026-06-18/ty-article/.premium/israeli-reservist-killed-in-explosion-in-southern-lebanon-idf-says/0000019e-d920-dae9-afdf-dbbbd0690000](https://www.haaretz[.]com/israel-news/israel-security/2026-06-18/ty-article/.premium/israeli-reservist-killed-in-explosion-in-southern-lebanon-idf-says/0000019e-d920-dae9-afdf-dbbbd0690000)

¹⁵ [hXXps://www.timesofisrael\[.\]com/several-said-injured-in-israeli-strikes-on-southern-lebanon/](https://www.timesofisrael.com/several-said-injured-in-israeli-strikes-on-southern-lebanon/)

and expectations he laid out for the Israeli public (i.e., the total destruction of Iran’s nuclear and ballistic missile programs).¹⁶¹⁷

- It is unlikely that Netanyahu would agree to withdraw troops from Lebanon ahead of general elections in September or October 2026—particularly in the face of continuing Hezbollah rocket and drone attacks that have reportedly raised the ire of large sections of Israel’s electorate, especially in the north of the country.¹⁸

In the short term, the United States is likely to pressure Israel to lessen its operations in Lebanon, including partial withdrawals—particularly if President Trump views these actions as jeopardizing peace talks with Iran. Iran will likely make similar efforts to restrain Hezbollah. Nonetheless, as long as Israel maintains a significant presence in Lebanon, Hezbollah is highly likely to continue waging a guerilla and drone-based campaign against Israeli forces.

The current MOU does not address Iran’s ballistic missile program or its international support for regional proxy groups, which are other leading Israeli concerns. It remains unclear whether the United States will prioritize these topics in future negotiations; should it do so, they will likely prove equally intractable.

- While Iran is unlikely to offer significant short-term concessions on these issues, the war’s economic toll will likely compel the Iranian government to prioritize domestic stabilization, making any substantial increase in material support for proxy groups unlikely for the foreseeable future. However, Iran will likely seek to reconstitute its weapons program and international proxy network in the long term. Further, Israel will almost certainly reject any long-term agreement that permits Iran to maintain its nuclear, ballistic missile, or proxy capabilities.

¹⁶ <https://www.economist.com/middle-east-and-africa/2026/06/16/the-end-of-the-war-in-iran-threatens-glorious-failure-for-israel>

¹⁷ <https://www.nytimes.com/2026/06/15/world/middleeast/israel-netanyahus-iran-strategy.html>

¹⁸ <https://www.haaretz.com/israel-news/israel-security/2026-06-17/ty-article/.premium/quiet-scarier-than-noise-residents-of-northern-israel-feel-abandoned-again/0000019e-d232-db7a-a9bf-dff6da640000>

| Conclusion

Signing the MOU only establishes a framework for future talks. Problems implementing the U.S.-Iran deal are likely—especially if different interpretations of key provisions emerge, creating opportunities for ceasefire collapse. Israel and Hezbollah remain key in this regard. These threats are expected to persist throughout the 60-day negotiation period and beyond. However, even if a durable solution is achieved in Lebanon, removing a key obstacle to long-term peace, the United States and Iran must still reconcile significant negotiating gaps. These include the status of the SoH, Iran’s nuclear program, and frozen assets, in addition to issues not yet slated for discussion, such as Iran’s ballistic missile program and regional proxy networks.

Final negotiations will almost certainly prove difficult, as the MOU reveals that both sides agree on little beyond a 60-day lull alongside SoH reopening. Without meaningful progress on the nuclear issue or Israeli security concerns, the threat of renewed fighting will remain.

Appendix A: Traffic Light Protocol for Information Dissemination

	Red	Amber
WHEN SHOULD IT BE USED?	Sources may use TLP:RED when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.	Sources may use TLP:AMBER when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.
HOW MAY IT BE SHARED?	Recipients may NOT share TLP:RED with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.	Recipients may ONLY share TLP:AMBER information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm. Note that TLP:AMBER+STRICT restricts sharing to the organization only.
	Green	Clear
WHEN SHOULD IT BE USED?	Sources may use TLP:GREEN when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.	Sources may use TLP:CLEAR when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.
HOW MAY IT BE SHARED?	Recipients may share TLP:GREEN information with peers and partner organizations within their sector or community but not via publicly accessible channels.	Recipients may share TLP:CLEAR information without restriction, subject to copyright controls.

| Appendix B: ZeroFox Intelligence Probability Scale

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

Almost No Chance	Very Unlikely	Unlikely	Roughly Even Chance	Likely	Very Likely	Almost Certain
1-5%	5-20%	20-45%	45-55%	55-80%	80-95%	95-99%