



Armed Conflict



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MENA SITUATION UPDATE: US-Iran talks enter critical window, with Iran expected to submit proposal ahead of potential talks on February 26; continue preparing for escalation scenarios

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Executive Summary:

- A third round of US-Iran talks, slated to be held in Geneva on February 26, is contingent on Tehran submitting a draft proposal to the US, reportedly by February 24. This represents Iran's effort to keep negotiations alive.
- While Tehran may include concessions in its proposal to narrow gaps with US demands, there are no indications that this will include relinquishing its domestic nuclear enrichment rights, the principal US red line.
- If Iran does not renounce its enrichment rights, even temporarily, the US will likely consider the diplomatic path exhausted, with Iran wasting time, and opt for kinetic action.

Current Situation:

Developments related to US-Iran talks

- On February 22, Oman's Foreign Minister (FM) Badr Albusaidi announced that the next round of US-Iran negotiations will be held in Geneva on February 26, adding that it will be "a positive push to go the extra mile towards finalizing the deal."
- According to an unconfirmed February 22 report citing a senior US official, Washington is still awaiting a proposal from Iran and expects to receive it by February 24.
- An unconfirmed February 22 report, quoting an Iranian official, stated that Iran is prepared to offer fresh concessions, including sending half of its most highly enriched uranium abroad, diluting the remainder, and participating in the establishment of a regional enrichment consortium. The official added that Iran would take these steps in exchange for US recognition of its right to peaceful nuclear enrichment and the lifting of economic sanctions.
- According to a February 22 report citing a senior US official, Washington and Tehran may discuss the possibility of an interim agreement before a full nuclear deal is reached.
- In a February 22 interview, Iranian Foreign Minister (FM) Abbas Araghchi stated that Iran is negotiating strictly on nuclear-related issues and that no other subjects are under discussion. He added that Tehran is preparing a proposal that will accommodate both parties' interests, which will be discussed in the upcoming talks, and expressed hope that the parties can reach a "fast deal."
- According to an unconfirmed [February 20](#) report citing a US official, Washington is prepared to consider an Iranian proposal that would allow Tehran to retain "token" uranium enrichment, provided it remains strictly conditioned on guarantees that it would not create any pathway toward the development of a nuclear weapon.
- In a February 20 interview, Iranian FM Abbas Araghchi stated that Tehran would present a proposal to the US "in the next two or three days." He also claimed that Washington did not demand zero uranium enrichment during the last round of talks.
- In a February 21 interview, US Special Envoy to the Middle East Steve Witkoff emphasized that Washington's red lines remain firm, particularly regarding "zero enrichment" and the transfer of stored enriched uranium.
- A February 20 report, citing US, Iranian, and Israeli officials and Gulf and European diplomats, assessed that the two countries are sliding rapidly towards military conflict, with talks at an impasse and President Trump "boxed in" by the US's military buildup in the region.

Evacuations of military/diplomatic personnel

- According to February 20 reports, a spokesperson for the Norwegian Armed Forces stated that Norway will relocate approximately 60 troops deployed in the Middle East due to security considerations amid ongoing regional tensions.
- According to February 19 reports, Berlin has reportedly moved some troops out of northern Iraq's Erbil due to the current tensions.
- According to February 23 reports, the US embassy in Beirut evacuated dozens of its staff members out of the country via Beirut's Rafic Hariri International Airport.

Iranian Threats

- On February 20, a government-linked Iranian outlet stated that in the event of a US attack, President Trump and his family's economic assets in the **UAE, Qatar, Saudi Arabia, Kuwait,** and **Bahrain** are in its initial target list. It added that **Jordan** would constitute an "important target," due to the "extensive concentration of US equipment" at bases in the country.

Protests in Iran

- On [February 21](#), student-led anti-government protests were recorded at Tehran's Amir Kabir University, Sharif University, and Shahid Beheshti University, as well as at a university in Mashhad,

where protesters reportedly chanted anti-government slogans.

- Students reportedly clashed with pro-government counter-protesters and Basij paramilitary forces inside the Sharif University campus. Unconfirmed reports indicate that security forces used crowd control measures against protesters outside Amir Kabir University.
- Unconfirmed reports indicated that protests continued on February 22 at Tehran's Shahid Beheshti University and Amirkabir University of Technology.

Other developments

- On February 20, the Israel Defense Forces (IDF) stated that it struck three distinct Hezbollah command centers in eastern Lebanon's Baalbek region, where it assessed that operatives from Hezbollah's missile array were accelerating the group's readiness and force build-up, in addition to planning attacks against Israel.
- According to an unconfirmed February 20 report, citing a senior US advisor, the Pentagon had presented President Trump with numerous options, including targeting Supreme Leader Ayatollah Ali Khamenei and his son. Another senior advisor added that President Trump is "keeping his options open" and "could decide on an attack at any moment."
- According to an unconfirmed February 20 report, US President Donald Trump is considering an initial, limited military strike against Iran to compel compliance with his nuclear demands. The strike, if approved, could reportedly be launched "within days" and would target Iranian military or government sites. Should Iran fail to concede, the US would then launch a broader campaign.
- On February 23, Iranian Foreign Ministry's spokesperson Esmail Baqaei stated "there is no such thing as a limited strike," adding that "any act of aggression" would be treated as such and would be met with a forceful response in line with Iran's right to self-defense.
- According to reports, the **USS Gerald R. Ford** aircraft carrier was located arriving at Greece's Crete in the Mediterranean Sea as of February 23 and is expected to arrive near Israel's coast soon.

Assessments & Forecast:

Iran to submit proposal to bridge gaps ahead of potential third-round talks with US on February 26

1. A third round of Oman-mediated talks in Geneva on February 26 remains contingent upon Iran submitting a detailed proposal to the US, reportedly by February 24. This effectively constitutes an ultimatum, requiring Iran to present a comprehensive and credible framework to address outstanding gaps to avert military escalation. This follows the second round of nuclear talks on February 17, which US officials assessed as failing to produce a plausible pathway to a breakthrough.
2. Remarks from Iranian officials reflect Tehran's effort to keep the diplomatic track alive against the backdrop of mounting indications in recent days that Washington is increasingly prepared to resort to military action, particularly in light of its substantial force buildup, which has come to fruition in recent days.
3. Reports suggest that Iranian officials will offer some concessions to move closer toward US demands. These allegedly include a willingness to dilute or export a portion of its highly enriched uranium stockpile and participation in a joint enrichment arrangement involving Arab states in return for US recognition of Iran's right to pursue peaceful nuclear enrichment and comprehensive sanctions relief. However, there are currently no public indications that Iran will relinquish its domestic enrichment rights, which US officials have repeatedly affirmed constitutes their primary red line, as underscored by Witkoff's latest remarks.
4. **FORECAST: If Iran's proposal does not renounce its domestic enrichment rights, even temporarily, the US will likely consider the diplomatic path exhausted, with Iran wasting time, and opt for kinetic action. Therefore, the coming days will likely be**

critical in determining the trajectory of the US-Iran tensions, with the ongoing uncertainty heightening the risk of miscalculations. As indicated by the reported evacuation of some personnel at the US Embassy in Beirut on February 23, the security environment across the region will remain volatile in the coming days, with an accumulation of “telling signs” continuing to underscore the growing risk of military escalation.

Recommendations:

MENA:

1. Update and implement business contingency plans (BCPs) and security protocols across the MENA region to ensure business continuity in escalation scenarios. Conduct arena-specific risk assessments, incorporating the risks involving the potential eruption of regional hostilities.
2. Reconsider nonessential travel to **Gulf states** at this juncture.
3. Reconsider travel to states that may be particularly adversely impacted in a scenario of regional armed conflict, including **Lebanon** and **Jordan**.
4. Avoid all travel to **Iraq** at the current juncture.
5. Avoid travel to military installations in the region, especially those hosting US personnel. Adhere to authorities' updates and advisories.
6. Remain cognizant of and take precautions against the potential resumption of Houthi maritime attacks in the Red Sea, as well as extensive GPS/GNSS disruptions in the Arabian/Persian Gulf, should armed conflict break out in the region.
7. **MAX Security has strong on-the-ground capabilities across several arenas in MENA, including secure transportation, the provision of safe havens, and contingency consultation and planning. Contact us at** [/cdn-cgi/l/email-protection#3f504f5a4d5e4b5650514c7f525e47124c5a5c4a4d564b46115c5052][**email protected**] **or +44 20-3540-0434.**

Iran:

1. Avoid all travel to Iran at the current juncture, given the economic and political crises, the risk of arbitrary detention, and prospects for a US military escalation against the country.
2. Foreign nationals operating in Iran are advised to leave the country at this time due to the above-mentioned risks.
3. Avoid all travel to hotspots of protest activity due to the elevated risk of violence and arbitrary arrests, and refrain from discussing protest activity in conversations and on social media. Maintain a low profile and avoid any public support for the protesters, including on social media, due to the heightened risk of arbitrary arrest and detention by Iranian authorities.
4. Allot for continued and extensive disruptions to business continuity, including internet and telecommunications shutdowns.
5. Monitor the situation and update business contingency plans, accounting for scenarios such as the escalation of nationwide unrest and armed conflict.
6. In the event of military strikes against the country, shelter in place and avoid the vicinity of government, law enforcement, and military installations.

Israel:

1. Avoid nonessential travel to Israel at this time.
2. In the country, adhere to all security precautions regarding armed conflict, militancy, and civil unrest.
3. Continue monitoring regional developments and promptly adhere to all Home Front Command (HFC) notifications. Ensure that the HFC or other “Color Red” alert applications, such as

- “Tzofar”, “Tzeva Adom”, or “Cumta-Red Alerts”, are downloaded to receive timely alerts.
4. Refresh and retain business contingency plans (BCPs) and security protocols, and ensure shelters’ preparedness for extended periods to increase resilience in an escalation scenario.