



IPS INSIGHTS

Perspectives On the Issues Shaping Policy

Second Round of Islamabad Talks between US and Iran:

An Interplay of the Madman Theory and the Good Cop–Bad Cop Dynamic

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After the first round of U.S.-Iran talks in Islamabad, the second round was anticipated this week, where parties were to advance negotiations on key redlines. This reinforces the importance of these historical talks, as each confidence building measure incrementally strengthens fragile trust, even as both sides seek to maximize leverage. Thus, for scholars of international affairs each confidence-building measure (CBM) incrementally strengthens fragile trust, even as both sides seek to maximize leverage. This process began after 40 days of catastrophic war having no parity among the actors. The first meaningful CBM was placed by Islamabad's hectic diplomatic efforts on April 12, 2026, providing breathing space for strategic reflection beyond the immediacy of hard power and its immense human and material costs. The first round of direct senior-level talks between the United States and Iran, held on April 11–12 in Islamabad, lasted 21 uninterrupted hours

but ended without a breakthrough, setting the stage for the yet-to-commence second round. Ostensibly, this was the first success. From a journalistic perspective, however, the situation appears markedly different. In a hyperactive media environment, narratives are driven by emotionalism and immediacy amplified by the daily statements of Donald Trump on the Truth Social. Amid the ceasefire, the reported presence of the U.S. destroyer USS Spruance (DDG-111) near the Strait of Hormuz, alongside Israeli strikes in South Lebanon, has reinforced Iranian mistrust and complicated the diplomatic atmosphere.

Empirically studying the situation is not paradoxical but emblematic of brinkmanship pushing the adversary to the edge to extract concessions. The logic echoes the Madman Theory associated with Richard Nixon during the Vietnam War (1969–1972 phase), including coercive signaling such as Operation Giant Lance. The core premise remains: convince

the adversary of one’s irrationality to compel negotiated restraint.

Today, a similar pattern is discernible: rhetorical escalation and strategic ambiguity

on one hand, and mediated negotiation on the other. The objective is to build multidimensional pressure so the adversary calculates that compromise is preferable to catastrophic escalation.

Comparative Strategic Chart: Madman Theory & Good Cop–Bad Cop (US–Iran Context 2026)

Dimension	Madman Theory (Nixon Model)	Good Cop–Bad Cop (Classical)	Present US–Iran Application (2026)
Core Logic	Appear irrational to force concessions	Divide roles to pressure + reassure	Dual signaling: escalation + negotiation
Key Actor	Richard Nixon	Coercive vs conciliatory negotiators	Donald Trump (rhetoric) vs diplomatic channels
Method	Unpredictable military threats (1969–72)	One threatens, other negotiates	Social media threats + backchannel diplomacy in Islamabad
Communication	Limited, elite signaling	Controlled negotiation environment	Instant, mass-level via Truth Social
Military Posture	Escalatory signals (e.g., nuclear alerts)	Implied coercion	Naval deployments near Hormuz
Diplomatic Channel	Henry Kissinger as negotiator	“Good cop” reassures	Mediated talks via Islamabad
Psychological Aim	Instill fear of catastrophe	Create urgency for compromise	Pressure Iran to negotiate under uncertainty
Risk Factor	Miscalculation → escalation	Breakdown of trust	High mistrust due to simultaneous strikes (e.g., South Lebanon)
Outcome Goal	Force adversary to concede	Extract negotiated settlement	Limit Iran’s nuclear scope + secure strategic corridors

Analytical Complexities in Routine Media Hype

Analytical clarity cannot be derived from the day-to-day statements of Donald Trump or from episodic actions in the Strait of Hormuz. Such signals are fluid, situational, and often designed for immediate psychological impact. A more rigorous assessment requires a doctrinal and strategic prism rather than a reaction to media-driven narratives. Much of the hype is constructed by design part of a broader “war of nerves” intended to shape perceptions, not necessarily realities. Within this framework, Israeli concerns are mana-

ged through calibrated military positioning. The reported control of approximately 30–35 kilometers in southern Lebanon, framed as a “buffer zone,” aligns with a long-standing Israeli colonization drive. Since the late 20th century—particularly visible during and after the 2006 Lebanon War—Israel has followed a pattern of limited territorial penetration, consolidation, and then ceasefire, retaining tactical gains as strategic leverage. This approach is neither accidental nor episodic; it reflects continuity in policy over decades. The objective is securing incremental gains on the ground. In this sense, any territorial or positional advantage in southern Lebanon

becomes a strategic dividend. Therefore, the Lebanon–Israel track is separated from the U.S.–Iran dialogue. While both unfold within the same regional theatre, their objectives, actors, have synergy at certain level.

Non-core issues shaping the second round

- i. U.S. emphasis on securing navigation through the Strait of Hormuz—despite it being open prior to the conflict is the effect not the cause, so not the demand but the leverage from both sides
- ii. The two adversaries are at a deadlock in negotiations, with the US demanding a 20-years suspension of Iranian uranium enrichment, whereas Iran has offered a five-year pause. The Iran’s nuclear trajectory is the only point Iran will demand the maximum dividend, despite Ali Khomeini’s longstanding position against nuclearisation

Conclusion

The empirical pattern, connecting the dots, suggests that Islamabad’s shuttle diplomacy, and leadership acumen have enabled the first two CBMs to hold effectively – signing the ceasefire and its subsequent extension. Therefore, the principal obstacle is not the immediate conclusion of an agreement, but rather the timeline and scope of nuclear enrichment constraints, which remain the core area of contention. The dialogue must be understood as a process, not an event; even the extension of the ceasefire constitutes substantive success. Ultimately, the anti-war logic underpinning these negotiations mirrors historical precedent—where sustained engagement, rather than immediate consensus on complex issues, defines outcomes. In this context, the extension of the ceasefire between the U.S. and Iran offers a sigh of relief that can help advance the peace process to the next phase and narrow differences at technical level.

