

The Campaign against Iran: Situation Assessment, Dilemmas, and Implications

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Three days into the campaign between Israel and Iran, Tehran is approaching a crossroads regarding the continuation of hostilities, a potential exit strategy, and a possible post-conflict arrangement. For now, Iran remains focused on managing the war. However, as the campaign continues and the damage accumulates, Tehran will need to choose between maintaining the current level of confrontation, ending the fighting through a political arrangement, or escalating further—potentially by withdrawing from the Non-Proliferation Treaty (NPT). This decision will be guided by Tehran’s assessment of the best path to preserve regime survival, its nuclear program, and its broader strategic capabilities. A critical dilemma will confront the Iranian leadership once the campaign ends: Whether to risk the regime’s short-term stability by prolonging the confrontation—especially given the potential for direct US involvement—or to abandon domestic uranium enrichment, which the regime views as a vital “insurance policy” for its survival.

Israel, for its part, faces two main options: to continue and expand the campaign in order to consolidate operational gains—despite the likely cost in casualties and damage to the home front—or to pursue a ceasefire once it determines that its key objectives, particularly those related to Iran’s nuclear program, have been met. In either case, Israel must remain prepared for ongoing conflict to preserve its achievements and, above all, to prevent Iran from restoring its nuclear capabilities—or worse, breaking out to nuclear weapons based on the capabilities it still retains.

Three days after the outbreak of hostilities between Iran and Israel, Iran is nearing a critical crossroads. This comes in the wake of the ongoing and significant Israeli strikes that have inflicted cumulative damage on Iran’s strategic assets and capabilities. From Tehran’s perspective, the picture remains mixed and complex. On the one hand, Iran has suffered a severe initial blow that targeted its senior military leadership. This strike was not only a strategic surprise and a national humiliation but also further evidence of Israel’s intelligence and operational penetration into the regime’s centers of power. It also resulted in a temporary and partial disruption to Tehran’s ability to effectively manage the campaign, due to the elimination of key figures in the Iranian armed forces: the chief of staff, the commander of the Islamic Revolutionary Guards Corps (IRGC), heads of the intelligence and operations divisions, and the commander of the IRGC’s Aerospace Force.

In addition, in the past few days, the Israeli Air Force has continued to achieve significant operational successes, delivering further damage to Iran’s nuclear program. This includes partial (although not total) damage to the Natanz enrichment facility and the targeted killing

of over ten scientists believed to be linked to the nuclear weaponization program and considered key to its development. Furthermore, Israeli strikes have also hit Iran's military-security infrastructure: command centers, missile and air defense systems, the IRGC's intelligence networks, and certain strategic energy facilities. Ongoing Israeli attacks could erode Iran's command and control system and gradually weaken the regime's ability to manage domestic challenges, potentially threatening its overall stability.

On the other hand, the Iranian leadership can point to a few limited achievements. Although its nuclear program has been damaged, the blow is not yet critical—especially since the Fordow enrichment facility remains intact. Additionally, there is currently no immediate or serious threat to the regime's internal stability. The leadership continues to project unity, determination, and vitality, and appears to be rallying together in the face of the external threat. While the Iranian public—whose hostility toward the regime is beyond a doubt—has expressed frustration at the authorities' failure to protect civilians, it has not, at this stage, shown active resistance to the regime. Public sentiment seems to be shaped, in part, by the harrowing images of destruction in residential neighborhoods hit by Israeli strikes, which have, paradoxically, fostered internal cohesion and a heightened sense of national solidarity.

Furthermore, Iran has succeeded in causing some damage to Israel's home front. Although limited in scope, the Iranian government and media have used documentation of these attacks to bolster a narrative of psychological resilience and long-term strategic parity—emphasizing the Islamic Republic's capacity to both endure and inflict harm on Israel over time.

It is reasonable to assess that Iran's leadership seeks to preserve several key achievements after the campaign ends: the survival of the regime—its top priority against internal and external threats; the continuity of its nuclear program—perceived as a core “insurance policy” for regime survival; and the preservation of critical strategic assets—such as missile systems, intelligence infrastructure, and command-and-control networks—necessary for confronting future security challenges. Decisions on how to manage the campaign, when to end it, and whether to pursue a post-conflict arrangement or revise its nuclear strategy will, in the coming weeks, be determined by Tehran's ability to maintain these core objectives.

At present, Iran remains focused on waging the war, attempting to minimize the impact of Israeli strikes while inflicting maximum damage on Israel. However, as the campaign continues and losses accumulate, Tehran's leadership will face several major options: continuing the current mode of warfare in an effort to drag Israel into a prolonged war of attrition; seeking to end the campaign through a political arrangement; escalating the conflict—possibly by withdrawing from the Non-Proliferation Treaty (NPT) or attempting a breakout to nuclear weapons, potentially at a clandestine facility, to provoke international intervention that could bring the war to a halt.

Continuing the campaign might allow Iran to continue targeting Israel's home front, but it would also require it to absorb increasingly severe damage—potentially endangering strategic assets, critical infrastructure, and other elements of its nuclear capabilities. Over time, such damage could undermine Tehran's ability to safeguard the very achievements it seeks to

preserve after the war. Moreover, Iran's capacity to sustain its current pace of missile fire is uncertain. If forced to adopt a "war economy"—particularly as Israeli operations further degrade its capabilities—it may be unable to pose a meaningful threat to Israel's air defense systems, relying instead on occasional, isolated launches.

Any Iranian decision to end the campaign and return to negotiations would depend on Israel's agreement to a ceasefire—and possibly on the US willingness to meet certain Iranian preconditions beforehand. Still, it is doubtful that Iran is currently ready to show the flexibility and readiness to return to negotiations. While Iranian Foreign Minister Abbas Araghchi has expressed a general openness to a ceasefire, the Foreign Ministry has already stated that renewing talks with the United States is futile, since Tehran refuses to believe that Israel acted independently but rather did so with US cooperation, or at least tacit approval from Washington.

Withdrawing from the NPT—a step already proposed by several members of Iran's Majles—or initiating a nuclear breakout could serve as pressure tactics to lead to international intervention. However, Iran's ability to covertly break out is highly questionable, given the documented intelligence penetration of its nuclear program and the continued intensity of IDF operations within Iranian airspace. Moreover, such a move carries significant risks: it could provoke direct American military intervention, which Iran is eager to avoid, and could also undermine the international legitimacy Iran has gained following Israel's preemptive strike.

Even if a ceasefire is achieved, Iran's leadership will face a profound strategic dilemma regarding its future course. On one hand, continuing with the domestic uranium enrichment could reignite the conflict and possibly trigger the US involvement in the war—posing an existential threat to the regime. On the other hand, agreeing to negotiate would force Iran to once again consider relinquishing its enrichment capabilities. Iran's Supreme Leader Khamenei will then face an exceptionally difficult choice: risk the regime's short-term survival by continuing the campaign and drawing the United States into the conflict, or jeopardize its long-term survival by abandoning what is viewed as a cornerstone of the regime's "insurance policy." In that sense, the decision could be even more difficult than that faced by Ayatollah Khomeini in 1988, when he agreed to a ceasefire with Iraq, likening it to "drinking the chalice of poison." The current leader may be forced to choose not merely whether to drink from that cup but between two lethal options—one that risks the regime's collapse in the short term, and another that could endanger it in the longer term.

If the Iranian supreme leader concludes that continuing the war poses a serious risk to the regime and that a nuclear breakout is infeasible—whether for technical reasons or due to unacceptable risk—he may agree to resume negotiations and possibly even make meaningful concessions, including on uranium enrichment. He might accept far-reaching compromises based on the assumption that residual nuclear capabilities could be leveraged later under more favorable conditions and under the guise of negotiations, as North Korea once did. Tehran may also demand the inclusion of other actors—such as Russia or China—in future negotiations, reflecting its deep distrust of the United States.

From Israel's perspective, there are two primary strategic options. The first is to continue the campaign to consolidate and expand military gains, which includes increasing the damage to Iran's nuclear program, targeting strategic military and security assets, and further weakening the regime. The advantage of this approach lies in eroding Iran's capabilities and further destabilizing its institutions. While Israel's ability to completely destroy Iran's nuclear program or eliminate all residual capabilities is limited without active US involvement, continued pressure may increase the chances of extracting more significant concessions from Tehran. However, this approach also entails heavy costs: sustained attacks on the Israeli home front, casualties, and infrastructure damage. Prolonging the war could also erode the sense of strategic achievements over time and create temptations to expand the campaign in directions that may not serve the core strategic objective: preventing Iran from acquiring nuclear weapons.

The other option is to pursue a ceasefire. At this stage, if a ceasefire is achieved, it is unlikely that Israel would realize all of its desired outcomes—especially in the nuclear domain. Moreover, even if a ceasefire is followed by negotiations (assuming Iran agrees), it is doubtful that Iran would offer additional meaningful concessions, given that Tehran may not yet feel its strategic capabilities are seriously threatened. Therefore, Israel should aim for a ceasefire (even in the absence of a formal agreement on Iran's nuclear program) only when it has achieved the maximum attainable gains in support of its strategic objectives, and when continued fighting would yield diminishing returns. In any case, Israel's stance will be significantly influenced by the position of the United States—both regarding the continuation of the campaign and the prospect of a future arrangement with Iran.

Regardless of how the current campaign ends—whether in a formal agreement or an informal ceasefire—Israel must prepare for the likelihood of an ongoing, long-term confrontation with Iran. This may involve continued military operations, covert actions (possibly coordinated with or supported by the United States), and sustained efforts to maintain strategic gains, prevent Iran from rebuilding its nuclear infrastructure, and, most critically, block any Iranian attempt to exploit remaining capabilities to break out to nuclear weapons.

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