

# "The Second Imposed War":

Operation Rising Lion and Its Implications  
for Iran's National Security

Raz Zimmt



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## INSTITUTE FOR NATIONAL SECURITY STUDIES

The mission of the Institute for National Security Studies (INSS) is to support Israeli policy and decision-makers—both professional and elected—in shaping policies that ensure Israel's future as a secure, prosperous, Jewish, and democratic state, with a solid Jewish majority and defensible, recognized borders.

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## EXECUTIVE SUMMARY

The 12-day war between Iran and Israel in June 2025 marked the sharpest escalation to date in the ongoing confrontation between the two states. Despite its relatively short duration, the war had a destabilizing effect on the Islamic Republic due to the success of Israel's opening strike, the decision of the United States to join the campaign, and the damage sustained by Iran's critical strategic systems—notably its nuclear program and long-range missile arsenal. The shock in Iran has been reflected in the name given to the war—"the Imposed War"—a term previously used to describe the eight-year conflict between Iran and Iraq in the 1980s. Just as the Iran–Iraq War shaped Iran's security doctrine and national psyche, this recent war is also likely to leave a lasting imprint on Iran's military-security posture, as well as its political, regional, and domestic arenas.

Since the end of the war, Iran has engaged in an ongoing process of drawing lessons from the serious gaps revealed in the Islamic Republic's deterrence and defense capabilities. On the one hand, senior political and military officials in Tehran present the war's outcome as evidence of an Iranian victory. In their view, Iran recovered quickly from the initial strike, conducted a simultaneous campaign against both Israel and the United States, inflicted severe damage on Israel, and ensured the regime's survival. On the other hand, Iran has clearly acknowledged the shortcomings exposed during the war, which require at least some changes and adjustments to its security doctrine. At the same time, a sharp internal debate has emerged over the scope of necessary change. Pragmatic-reformist circles are calling for a paradigmatic shift that prioritizes addressing Iran's urgent domestic crises through far-reaching reforms in both domestic and foreign policy, while conservative-hardline circles argue that instead of retreating from foundational principles, only limited adjustments should be made within the existing frameworks.

The most significant damage sustained by Iran during the 12-day war was to its nuclear program. The war set the program back considerably, particularly its enrichment capabilities, although residual capacities remain that could assist Iran in reconstructing the program or even breaking out to nuclear weapons. Moreover, Iran's motivation to obtain nuclear weapons has increased in light of the war's lessons, which exposed the failure of its deterrence; at the same time, its leadership appears apprehensive about taking steps that could trigger another strike. Although it seems that Iran currently prefers to maintain "nuclear ambiguity" regarding the capabilities it still possesses and to refrain, for now, from reconstructing the enrichment and weaponization capabilities damaged in the war, it is doubtful whether such a situation can persist for long. In parallel, Tehran continues to bar the return of International Atomic Energy Agency (IAEA) inspectors to the nuclear sites that had been attacked, and the prospect of reaching a political arrangement between Iran and the United States that would produce a nuclear agreement blocking Iran's path to nuclear weapons appears increasingly unlikely.

At the same time, Iran has intensified its efforts to reconstruct and upgrade its military systems, particularly its missile forces and air defenses, in order to improve its readiness for a scenario of renewed fighting. These efforts include ramping back up to pre-war missile production rates, improving missile accuracy, reconstructing its air defenses, and strengthening the protection of its strategic systems. Despite the damage that the Iranian missiles inflicted on Israel during the fighting, the war demonstrated to Iran that its missile arsenal was the only system that proved itself. Tehran continues to view it as a strategic asset capable of harming Israel, wearing it down, and constraining its ability to conduct a prolonged campaign over time, given Israel's limited interception capacity.

In the regional arena, the war further highlighted the collapse of the proxy concept, whose limitations had become increasingly evident even before the conflict—particularly after Hezbollah's defeat in the summer of 2024

and the fall of the Assad regime in Syria. The refusal of key components of the Iranian-led “Axis of Resistance,” most notably Hezbollah, to join the war alongside Iran increased Tehran’s doubts about the effectiveness of its proxy strategy. Nonetheless, statements by senior Iranian officials—along with Iran’s continued efforts to support and assist the pro-Iranian axis, including through weapons transfers—clearly indicate that Tehran does not intend to abandon its partners in favor of a new regional strategy. Moreover, Iran continues to stress the need to preserve the military capabilities of the axis and to oppose any attempt to disarm the Shiite militias, above all Hezbollah. This dynamic is unfolding alongside Iran’s active engagement with key governments in the Arab world, including Lebanon, even as it declares that it has no intention of interfering in the internal affairs of Arab states. In addition, Iran has made sustained efforts to improve relations with its Arab neighbors, leveraging their concerns regarding its military power, their doubts about American security commitments, and their growing view of Israel as a source of regional instability.

In the domestic arena, the war demonstrated to the Iranian leadership that Israel is determined to topple the regime and even fragment Iran and undermine its territorial cohesion. Israel’s actions, however, did not destabilize the regime and, in fact, prompted the public to exhibit a significant degree of national solidarity. Nonetheless, the fundamental challenges facing the Islamic Republic are a crisis of legitimacy, a worsening economic crisis, and growing water and electricity shortages. After the war, aware of the escalating internal problems, the regime employed tactics to assuage growing public disillusionment. It sought to rally the public around symbols of Iranian nationalism, intensify political repression of its opponents, while simultaneously responding to certain public demands, such as easing the enforcement of the Islamic dress code. The war also heightened doubts about the condition of Iran’s leader, Ali Khamenei—who was forced into hiding during the war—and about the extent of his control over the regime’s decision-making machinery.

These doubts, combined with his advanced age and reports of deteriorating health, have amplified the debate over the question of succession.

In sum, the war's implications and lessons require Iran to reassess its security doctrine and policy framework. The Iranian leadership is certainly aware of the need for improvements and adjustments to its national security doctrine; yet for now, this does not appear sufficient to produce a fundamental shift in Iranian strategy. It seems that Iran prefers to make adjustments within the existing framework by finding acceptable solutions to the gaps exposed rather than introducing major changes to its overall strategy.

Nonetheless, the new reality in Iran created by the war is characterized by instability, and it is doubtful whether the current status quo can endure for long. This is exacerbated by the growing possibility of a miscalculation between Iran and Israel that would lead to renewed clashes, or high-risk decisions by Iran on both the nuclear issue and on the regional front. Moreover, Iran's ongoing process of drawing lessons and upgrading its weapons systems, combined with the possibility that Israel may target Iranian national infrastructure in the next round, could make a future military confrontation far more volatile, including the potential for escalation into a regional war.

There is no doubt that Iran faces significant challenges both domestically and externally, but it could also capitalize on several opportunities, including the survival of Hamas in the Gaza Strip, delays in disarming Hezbollah, the rivalry between the United States and both Russia and China, and the erosion of Israel's international and regional standing. Conversely, Israel's success in its ongoing campaign against Iran will depend heavily on its ability to exploit the current window of opportunity to shape a new regional reality—one that contains Iran, further weakens it, and limits its ability to leverage opportunities to regain strength.



Given this reality, Israel must act on several fronts. These include:

- Preparing for another round of fighting, particularly in scenarios involving nuclear reconstruction or a nuclear breakout;
- Preserving and further developing covert counter-proliferation capabilities to prevent or delay the reconstruction of Iran's nuclear and missile programs, while simultaneously enhancing Israel's own capabilities to counter the missile threat;
- Supporting international and regional efforts to promote a stable, long-term arrangement with Iran that blocks its pathway to nuclear weapons, based on an agreement that would sharply limit enrichment capabilities, allow effective and improved IAEA monitoring, and address the fissile material remaining in Iran after the war;
- Advancing understandings, even informal ones, between the United States and Iran to reduce the risk of escalation in the absence of a long-term agreement;
- Establishing a credible threat to the survival of the regime to deter Iran from steps that would bring it closer to nuclear weapons;
- Continuing enforcement measures to prevent the reconstruction of the pro-Iranian axis, led by Hezbollah;
- Encouraging regional stabilization processes, strengthening state institutions in the Arab world, and creating alternatives to Iranian influence;
- Engaging in sustained efforts to weaken the Iranian regime.

## INTRODUCTION

It is difficult to overstate the significance of the 12-day war between Iran and Israel. The war marked not only the most severe peak so far in the ongoing confrontation between the two states, but also the most traumatic event for Iran since the end of the Iran–Iraq War in 1988. The war, and especially the heavy salvos of missiles launched from Iran toward Israel, also heightened fear and anxiety within Israel—already traumatized by the October 7 massacre and the ongoing campaign on seven fronts. Following the war, a debate emerged regarding its results. Prime Minister Benjamin Netanyahu described the outcome of the war with Iran as “a historic victory that will stand for generations.” He declared that Israel had succeeded in removing two immediate existential threats: the threat of annihilation by nuclear bombs and the threat of annihilation by 20,000 ballistic missiles, and that Israel had dealt “crushing blows to the evil regime” in Tehran.<sup>1</sup>

US President Donald Trump went even further, declaring that the nuclear facilities had been “completely destroyed” and that the United States had set back Iran’s nuclear program by decades.<sup>2</sup> Others, however, raised doubts about the removal of the Iranian threat. A senior Israeli intelligence official expressed satisfaction with the campaign’s achievements but emphasized that it was neither correct nor responsible to declare the “removal of the threat.”<sup>3</sup> Rafi Meron, former Deputy Head of the National Security Council for Technology and Special Affairs, likewise voiced skepticism regarding the

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- 1 Prime Minister Netanyahu in a statement to the media. “Statement by PM Netanyahu – 24 June 2025.” Prime Minister’s Office. <https://tinyurl.com/5cbr9m8k>
  - 2 “Israeli lawmaker denies Trump claim Iran’s Fordow nuclear site destroyed,” *Ynet*, June 25, 2025. <https://tinyurl.com/4dv6sych>
  - 3 Ronen Bergman, “Convoluting phrasing, messages from the most secretive body: ‘To say that the threat has been removed? That is neither correct nor responsible.’” *Ynet*, June 27, 2025. <https://tinyurl.com/45nrc8ae>

elimination of the nuclear threat to Israel, arguing that the war's objectives had not been achieved.<sup>4</sup>

If in Israel—the side whose operational achievements in the war are beyond doubt—the war sparked debate over its implications and lessons, then in the Islamic Republic it was perceived as a profoundly destabilizing event. The Israeli strike on June 13 and the United States' entry into the campaign a few days later took Tehran by surprise. For years, Iran had assessed that while Israel wished to attack its nuclear facilities, it lacked the capability to achieve meaningful results; the United States, by contrast, had the operational capacity but no desire to become entangled in another Middle Eastern conflict.

The air superiority achieved by Israel during the war, together with the intelligence penetration it revealed, astonished senior Iranian officials and citizens alike. The intensity of the shock was reflected in the name given to the war in Iran: “The Imposed War” (جنگ تحمیلی); the same term used to describe the eight-year Iran–Iraq War of the 1980s. That war is still perceived in Iran as a national trauma embedded in the collective memory. Thirty-seven years after its end in 1988, millions of Iranians from a generation that did not experience the first “Imposed War” were exposed to the horrors of the second “Imposed War.” A member of the Iranian Psychologists Association reported a 40% increase in calls to psychological treatment centers after the war.<sup>5</sup>

An article published shortly after the war on the *Iranian Diplomacy* website compared the two “Imposed Wars,” arguing that despite significant differences in means and methods of warfare, the similarities between them are striking. Iraqi ruler Saddam Hussein attacked Iran in the hope of achieving a swift victory, based on the assessment that the country had been weakened by the Islamic Revolution and would collapse quickly. Similarly, Israel believed that

4 “The objectives of the war have not been achieved.” *103FM*, June 24, 2025. <https://tinyurl.com/kdv8ekc2>

5 “The psychological injuries of the 12-Day War: From PTSD to increased cigarette consumption.” *Hamshahri*, July 22, 2025. <https://tinyurl.com/3wvyh6wf>

eliminating Iran's senior command echelon would paralyze the country and lead to its disintegration. Then, as now, the enemy enjoyed the support of global powers, while Iran was left almost alone. Yet, as then, Iran managed to regain control rapidly. In the 1980s, it succeeded in reclaiming occupied territories within about two years; this time, its armed forces managed to stabilize the situation within a week and exact a heavy price from Israel. Moreover, in both cases, it was demonstrated that through internal cohesion, wise and unified leadership, the heroism of its fighters, and effective deterrence based on military buildup, advanced weaponry, alliances with other countries, and security agreements with regional states, Iran was capable of overcoming the crisis and inflicting defeat upon its enemies.<sup>6</sup>

The Deputy Commander of the Iranian Army for Coordination, Amir Habibollah Sayyari, also pointed to the similarities between the two wars. He noted that the enemy's objective in both was to defeat the revolution and undermine Iran's territorial integrity. In both cases, all necessary resources were made available to the enemy. In the 1980s, Saddam Hussein was supported by all Western countries, from both the eastern and western blocs, and today Israel is supported by NATO and the Western states. Then, as now, Iran was forced to fight not against small enemies but against global imperialism as a whole.<sup>7</sup>

Just as the Iran–Iraq War shaped Iran's national security doctrine and national consciousness, it is reasonable to assume that the 12-Day War is also likely to shake the Islamic Republic in the coming years and leave a significant mark on its military-security, political, regional, and domestic arenas. The importance of the war can be inferred from the words of the Commander of the Iranian Army, Amir Hatami, who said in a meeting with

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6 "The similarities between the two imposed wars." *Iranian Diplomacy*, September 25, 2025. <https://tinyurl.com/5ebsj7ue>

7 "Analysis by the Chief Coordination Officer of the Army regarding Iran's two imposed wars." *Khabar Online*, September 25, 2025. <https://tinyurl.com/ym7594ha>

members of the Majlis Committee on National Security and Foreign Policy that the 12-Day War taught Iran lessons equivalent to 12 years of experience. He noted that Iran had experienced a fully integrated war, in which the enemy combined advanced technology with political, media, security, and intelligence components, and that based on these lessons, Iran had adopted new approaches to deal with all types of threats, which would lead to more effective action against the enemy.<sup>8</sup>

The primary aim of this memorandum is to examine the lessons that Iran is drawing from the war and its implications in four main areas: the nuclear program, strategic military systems, the regional arena, and the domestic arena—and to assess how the war has influenced Iran’s national security concept. To this end, I have relied primarily on statements by senior Iranian officials and on reports and analyses in Iranian and Western media regarding the war and its consequences. I have also drawn on the work of the INSS Operation Rising Lion Lessons Study Teams, which convened at the Institute for National Security Studies (INSS) immediately after the war.

Naturally, assessing the implications of the war only a few months after its conclusion is a challenging and problematic task, given the absence of sufficient perspective, ongoing uncertainty and rapid developments that could alter the rules of the game both in Tehran and in Jerusalem. The Iranians are still in the relatively early stages of drawing lessons from the war and shaping the emerging reality, and it is too soon to reach firm or definitive conclusions regarding the war’s consequences and its impact on Iran’s evolving strategy. Nonetheless, the importance of the subject and the potential for renewed hostilities require an examination of Iran’s learning and assessment process even at this early stage. Moreover, it is already possible to identify key trends in Tehran’s strategic thinking and lesson-learning processes, providing a basis for continued monitoring and research on the war and its ramifications.

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8 “General Hatami: The 12-Day War taught us lessons equal to 12 years of experience.” *Mehr*, October 13, 2025. <https://tinyurl.com/87yrjx7s>



## INTRODUCTION

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## CHAPTER 1

# BETWEEN THE "VICTORY NARRATIVE" AND THE "PARADIGM SHIFT"

The *Am Kalavi* (Rising lion) War between Israel and Iran, which lasted from June 13 to June 24, 2025, was the first full-scale direct confrontation between the two countries. It was initiated by Israel against the backdrop of the failed negotiations between Tehran and Washington to reach an improved nuclear agreement; alarming developments in the weaponization domain within Iran's nuclear program, which raised concerns that Tehran might shorten the time required to produce its first nuclear explosive device; rapid progress in Iran's missile program force-building; and a historic window of opportunity that opened following Hezbollah's defeat in the summer of 2024, the collapse of the Assad regime, the destruction of Iran's air defense systems in an Israeli strike at the end of October 2025, and other operational circumstances.

The war began with a large-scale surprise attack by the Israeli Air Force, which included targeted assassinations of senior commanders of Iran's armed forces—among them the Chief of the General Staff, the Commander of the Revolutionary Guards, and the Commander of its Aerospace Force—as well as the killing of several senior nuclear scientists who served as key centers of knowledge in fields relevant to nuclear weapons development. During the fighting, in which Israel achieved air superiority over Iranian territory, the Air Force carried out hundreds of sorties attacking nuclear facilities, ballistic missile sites, air defense systems, airfields, command and control centers, and headquarters of the Revolutionary Guards and law enforcement forces. Iran responded with an intense barrage of more than a thousand UAVs and about 500 ballistic missiles fired at Israel, some of which penetrated the defense system, causing the deaths of about 30 civilians and extensive property damage. On June 22, the United States joined the campaign and

struck the uranium enrichment facilities at Fordow and Natanz, as well as the nuclear complex in Isfahan.

After 12 days of fighting, a ceasefire was reached through US mediation. The Israeli-American attack caused significant damage to Iran's nuclear program, particularly to its enrichment capabilities, and inflicted extensive harm on Iran's missile arsenal by destroying or neutralizing many launchers and missiles and slowing the Islamic Republic's pace of military buildup in this field.

In October 2025, the Deputy Commander of the Revolutionary Guards for coordination, Mohammad Reza Naqdi, admitted that Iran had been surprised by the Israeli opening strike. In a televised interview, the senior commander noted that Tehran had expected Israel to target nuclear and missile sites but had not imagined it would strike at commanders and scientists sleeping in their homes with their wives and children. "That was a mistake in our assessment," he said.<sup>9</sup>

Amir Pourdastan, head of the Iranian Army's Center for Strategic Studies and Research, also acknowledged the element of surprise. "I say honestly," the senior officer told a conference of the Islamic Student Associations' Federation, "we were in shock [from the Israeli attack]." However, he emphasized that thanks to the leadership and wisdom of Iran's leader, Ali Khamenei, Iran managed to recover from the surprise strike. "A shock was cast over everyone, and the one who awakened us, who gave this weary body of our spirit, life, and energy, and who guided us with his wisdom, was the Supreme Leader and Commander of the Armed Forces, Imam Khamenei." Without the Leader, Pourdastan said, it is impossible to know what would have become of the state. He further added that during the war, President Trump's envoy, Steve

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9 "General Naqdi: Our assessment was that the enemy would attack nuclear and missile facilities; we did not anticipate that they would strike our commanders and scientists in their homes together with their wives and children." *Entekhab*, October 19, 2025. <https://tinyurl.com/mvx4kp4f>

Witkoff, called and asked Iran to cease fire. "If Trump asked for a ceasefire, it wasn't out of strength but because he was truly afraid," claimed the officer.<sup>10</sup>

These statements can be seen as reflecting the duality that characterizes the Iranian leadership's perception of the war and its outcomes. On one hand, they demonstrate a clear recognition by the military leadership of the magnitude of the blow suffered by the Islamic Republic, of the intelligence surprise, the initial paralysis of command-and-control systems, and the confusion that spread through the political and security elite. At the same time, they express satisfaction and pride in Iran's ability to recover quickly from the initial shock. Moreover, according to the Iranian narrative, the state succeeded within a short time not only in halting the effects of the attack but also in regaining the initiative—so much so that the United States and Israel were forced to agree to a ceasefire after failing to achieve their objectives in the war. From this perspective, Iran must acknowledge the heavy blow it suffered and draw the necessary lessons from the war, while simultaneously emphasizing its resilience and rapid recovery, which, in its view, serve as further proof of the strength and fortitude of the Islamic Republic.

### **The Iranian "Victory Narrative"**

Despite the blow Iran suffered in June 2025, since the war, senior Iranian officials have continued to promote a "victory narrative," which emerged immediately after the ceasefire took effect on June 24, 2025. This narrative rests on several key arguments. First, Iran recovered relatively quickly from the initial strike. Second, it waged a campaign not only against Israel but also against the United States—and succeeded in confronting both. According to Iranian officials, without US support, Israel would not have been able to continue fighting. For example, the Deputy Commander of the Iranian Army

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10 "Amir Purdastan: In the 12-Day War, we were struck with shock." *Donya-ye Eghtesad*, September 19, 2025. <https://tinyurl.com/4hu7zxyz>

for Coordination, Sayyari, declared that without the assistance of the United States and NATO, Israel would have had no capacity to fight.<sup>11</sup>

Third, Iran inflicted severe damage on Israel's home front—damage that, according to the Iranian perspective, was partly concealed by Israel.<sup>12</sup> Tehran claims that the extent and severity of these strikes forced Israel to agree to a ceasefire before achieving its war objectives. Yahya Rahim Safavi, senior adviser to Iran's Supreme Leader, stated that the hundreds of missiles fired from Iran toward Israel caused extensive damage to infrastructure throughout the country, including refineries, power stations, and research centers. These attacks, he said, resulted in severe losses, even though Israel sought to suppress their disclosure.<sup>13</sup>

A fourth point is that Iran retained significant capabilities in its nuclear and missile programs despite the damage they sustained, allowing for relatively easy reconstruction. Responding to President Trump's claim that the attacks on Iran had destroyed its nuclear program, Iran's Supreme Leader Khamenei said in October 2025: "Very well, let him keep imagining." He noted that Trump boasted of eliminating Iran's nuclear scientists, but "their knowledge cannot be destroyed."<sup>14</sup> The head of Iran's Atomic Energy Organization, Mohammad Eslami, addressed the war's implications for the nuclear program in a September 2025 interview with Sky News. He stated that it is entirely natural for facilities to be damaged and infrastructure destroyed during a military attack. However, what matters, he emphasized, is that Iran's science,

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11 "Analysis by the Chief Coordination Officer of the Army regarding Iran's two imposed wars." *Khabar Online*, September 25, 2025. <https://tinyurl.com/ym7594ha>

12 "An unprecedented France 24 report on the 12-Day War: How did Iran respond, and what did Israel censor?" *Khabar Online*, August 6, 2025. <https://tinyurl.com/4pd9n4dc>

13 "General Rahim Safavi: We launched 500 missiles toward Israel; 16 pilots of the [Zionist] regime were killed; the damage was severe." *Tasnim*, September 29, 2025. <https://tinyurl.com/mt7a4yfb>

14 "Statements by the [Leader] in a meeting with champions and medalists in sports and global scientific Olympiads." *Website of Iran's Supreme Leader*, October 20, 2025. <https://tinyurl.com/uezxpghy>



knowledge, technology, and industry are deeply rooted and have a long tradition, and that the nuclear facilities destroyed in the war will be rebuilt.<sup>15</sup>

Fifth, Israel and the United States failed to achieve their primary goal: the overthrow of the Iranian regime. Moreover, the Iranian public rallied in support of the government. From Iran's Supreme Leader's perspective, Israel's strikes on symbols of power during the war provided further proof that Israel sought not only to damage the nuclear program or the missile system, and not even merely to topple the regime, but to dismantle Iran and sow chaos. According to him, Iran's enemies believed that by assassinating several commanders and senior officials, their agents would ignite unrest within the country—especially in Tehran—bring citizens into the streets, and trigger an uprising against the Islamic Republic. That, he claimed, was their goal, and they had even planned in advance what would occur after the regime's collapse. Yet, even during the war, they realized they would not achieve this. The commanders were replaced almost immediately, the armed forces remained firm, and the public did not respond to calls for rebellion. They did take to the streets—but not against the Islamic regime, rather against the enemy.<sup>16</sup>

On the very day the ceasefire was announced, Iranian President Masoud Pezeshkian declared a "historic victory" in the 12-Day War imposed by Israel. He stated that the great Iranian nation had demonstrated steadfastness and resistance and had forced the enemy to agree to a ceasefire. Pezeshkian added that the enemy had suffered a complete failure in achieving its objectives and that the collapse of its image and the widespread destruction inflicted on Israel sent the world a clear message that the price of adventurism against Iran is grave and terrible.<sup>17</sup>

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15 "Some of Iran's nuclear facilities were 'destroyed' by US strikes, nuclear chief admits." *Sky News*, 24 September 2025. <https://tinyurl.com/ye2y78vm>

16 "Televised address to the Iranian people." *Website of Iran's Supreme Leader*, September 23, 2025. <https://tinyurl.com/254pua5c>

17 "Pezeshkian's message to the citizens: The honor for this victory belongs entirely to the great Iranian nation." *Fararu*, June 24, 2025. <https://tinyurl.com/pt8mztd9>

In a recorded message to the Iranian people, Supreme Leader Khamenei declared that Iran had defeated the “fake Zionist regime,” which had almost completely collapsed under the Islamic Republic’s attacks. He stated that Iran’s armed forces had destroyed many military and civilian areas in Israel with their missiles and advanced weaponry, proving to the “Zionist regime” that any act of aggression against Iran would exact a heavy price. Khamenei added that Iran had also defeated the United States, which intervened directly in the war only after realizing that if it did not, Israel would be completely destroyed. The United States, he said, tried to save Israel but achieved nothing and failed to cause significant damage to the nuclear facilities.<sup>18</sup>

On July 16, Khamenei delivered his first public speech after the war, at a meeting with senior members of the judiciary. This event provided him another opportunity to present the victory narrative. He emphasized the self-confidence displayed by the Iranian people in the face of the United States and Israel, which he called “its dog in the region.” He stressed that Iran had not sought war, but when attacked, its response was decisive.<sup>19</sup>

The victory narrative was also reflected in official statements by Iran’s military institutions. A statement by the Chief of Staff of the Armed Forces, Abdolrahim Mousavi, declared that the armed forces had employed all their capabilities, that their response to the “aggressive Zionist enemy” was painful and extensive, and that they had succeeded in halting its war machine, relying solely on local capabilities and domestically produced weapons. As a result, the statement continued, the leaders of the United States were forced to request a ceasefire through mediation by regional states and, in effect, surrendered to the will of the Islamic Republic.<sup>20</sup>

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18 “Third televised message addressed to the Iranian people following the attack by the Zionist regime.” *Website of Iran’s Supreme Leader*, June 26, 2025. <https://tinyurl.com/3hw7hpk5>

19 “Statements in a meeting with the head and senior officials of the Judiciary.” *Website of Iran’s Supreme Leader*, July 16, 2025. <https://tinyurl.com/42avetdf>

20 “Chief of the General Staff of the Armed Forces: Iran imposed its will on the United States and the Zionist regime in the recent war.” *ISNA*, June 26, 2025.

A statement by the Revolutionary Guards, asserted that Iran had succeeded in preserving the key components of its nuclear program and the infrastructure of its missile and defense systems, and had shattered the myth of the enemy's multilayered and "invincible" air defense. The statement added that the entry of the US military into the battlefield to rescue the "Zionist army" had failed to alter the balance of power and that, while Israel had initiated the war, its conclusion was dictated by "the brave sons of the nation in the armed forces," especially the Aerospace Force of the Revolutionary Guards.<sup>21</sup>

The spokesman for the Revolutionary Guards, Ali-Mohammad Naeini, also addressed Iran's achievements in the campaign, asserting that not only had Israel and President Trump failed to achieve their objectives in the war, but they had also come to see the Islamic Republic's ongoing missile attacks as a genuine threat to the very existence of the "Zionist regime." According to him, the war proved that the residents of the "occupied lands" [Israel] were defenseless in the face of the power of Iran's missiles and drones, and there was no doubt, from the standpoint of public opinion, that Iran was the absolute victor in the campaign.<sup>22</sup>

Ahmad Vahidi, senior adviser to the Commander of the Revolutionary Guards and former Minister of the Interior, also referred to Iran's victory. In an interview with Iranian television, Vahidi responded affirmatively when asked whether Iran had won the war. He stated that had Iran not won, its enemies would not have been under such heavy pressure that they were forced to request a ceasefire. Vahidi emphasized that Iran had fought the war with a very limited budget and modest technology compared to the most advanced weaponry in the world, yet it had succeeded in compelling Israel to agree to a ceasefire. He added that the Islamic Republic's missile doctrine

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21 "Final statement by the Islamic Revolutionary Guard Corps regarding the imposed war." *Tabnak*, June 26, 2025. <https://tinyurl.com/yvtn7x22>

22 "IRGC spokesperson: We advise Trump to stop his nonsense". *Tasnim*, June 28, 2025. <https://tinyurl.com/25v2dmfa>

had triumphed on the battlefield over all the aircraft, satellites, intelligence efforts, and command-and-control centers in West Asia.<sup>23</sup>

Although many of these claims involve significant exaggeration, it would be unwise to dismiss them entirely as baseless propaganda. The statements coming from Tehran echo, to some degree, earlier stages of the “victory theory” adopted by the “Resistance Camp” from the early 1990s through 2021. At its core lies the concept of victory through non-defeat—the idea that mere survival in confrontation constitutes victory, since the opposing side fails to achieve a clear, decisive triumph.<sup>24</sup> Since the Second Lebanon War in 2006, this theory evolved into a new phase of “victory on points,” meaning deterrence capability and, ultimately, coercion against the State of Israel. In recent years, this concept has undergone further modification, based on a reassessment by pro-Iranian axis actors of the balance of power between them and Israel, and an emerging sense of confidence in their ability to defeat Israel in a coordinated, multi-front war.<sup>25</sup> However, it is still too early to assess whether the victory narrative that Iran has promoted since the war reflects an acknowledgment of its weakness and a need to redefine its concept of victory over Israel, given the constraints it now faces as a result of the war.

### **Conceptual Change or Strategic Adjustment**

Despite the victory narrative that Iran seeks to project both domestically and internationally, the failures of the war have not escaped the attention of the authorities in Tehran. Even within conservative and hardline circles, there is an acknowledgment of the need to draw lessons and correct the deficiencies that were exposed. Yet, while the hard core of regime supporters, as noted,

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23 “Did we win the war with Israel? / General Vahidi’s account.” *Tasnim*, July 24, 2025. <https://tinyurl.com/53rwjscw>

24 Itai Brun and Carmit Valensi, “The Military Affairs Revolution of the Radical Axis,” *Ma’arachot*, 432 (August 2010), pp. 40–53. <https://tinyurl.com/ysmv9ee7>

25 Itai Brun, “The Five Stages in the Development of the ‘Victory Theory’ of Israel’s Enemies,” *Ha’Uma*, 237 (February 2025), pp. 27–32. <https://tinyurl.com/4h8pydxz>

was quick to present the outcome of the war as proof of the Islamic Republic's triumph, their critics in the pragmatic-reformist camp sought to use the war's results to advance fundamental changes that, in their view, are essential to securing Iran's future. From their perspective, the major challenges facing Iran require a deep and fundamental paradigmatic shift—centered on the urgent need to address internal crises, foremost among them the economic crisis, through far-reaching reforms in both domestic and foreign policy.

In contrast, their conservative-hardline critics argue that the problem does not lie in the strategic concept itself but in its implementation. According to them, even if Iran's path requires reassessment, the blows suffered by Iran and its proxies do not justify altering the Islamic Republic's core strategic objectives. The war, they claim, actually reinforced the belief that there is no substitute for the path of resistance and steadfastness in the face of Israel and the United States. The Israeli-American strike, in their view, served as further proof of Washington's treachery and the futility of attempts to negotiate with it—a process now seen, in hindsight, as a deception meant to mislead Iran in preparation for military attack. Under these circumstances, the solution does not lie in conceptual change or retreat from fundamental principles but in limited adjustments within existing frameworks.

The reformist political activist Saeed Shariati explained the internal Iranian debate over the lessons of the war in an interview with the news website *Jamarian*, pointing to the need for a paradigmatic shift based on a transition from the concept of "expanding strategic depth" (توسعه عمق استراتژیک) to that of "Iran First" (ایران اول). According to him, the strategy that had guided Iranian foreign policy until now focused on achieving strategic depth and strengthening the "Resistance Front." However, developments in the two years since October 7, 2023, have brought about a profound change in the required strategy, and Iran's political system is now divided into two main camps: one believes the focus should shift to "Iran First," that is, prioritizing the Islamic Republic's internal challenges; the other continues to believe



in the need to expand and consolidate Iran's "strategic depth," despite the blows suffered and the heavy costs involved.<sup>26</sup>

The internal debate over the implications of the war and the changes that should be adopted in light of its lessons erupted shortly after its end. The first shot of this public discussion was fired by 180 economists and academics identified with the pragmatic camp, who published a statement calling for a "paradigm change" (تغییر پارادایم) in the Islamic Republic. Although the signatories condemned the attacks by Israel and the United States, they called for the adoption of a new policy—both domestic and foreign—that would enable Iran to extricate itself from its deepening crisis. They argued that persistent inefficiency, rigid foreign policy, and the erosion of public trust in state institutions jeopardized the country's future. Their declaration included a series of recommendations, among them political and economic reforms, the expansion of political and civil freedoms, renewal of negotiations with the United States, improvement of relations with the West, and the cessation of military involvement in the economy.<sup>27</sup>

Similarly, the pragmatic politician Mohsen Hashemi argued that a paradigm shift was an essential condition for addressing the roots of the crisis following the war. In an interview with the reformist newspaper *Shargh*, the son of former Iranian president Akbar Hashemi Rafsanjani stressed the need to create a more open and diverse political space, to lift restrictions on the media, to restore public trust, and to adopt a realistic foreign policy—including toward Israel—that prioritizes national interests over ideological considerations. This, he said, would enable the country to move from its current state of crisis and stagnation to a path of development and progress.<sup>28</sup>

26 Saeed Shariati: "The 'national matter' is a paradigm shift in the discursive space of the country's overall politics." *Jamaran*, August 5, 2025. <https://tinyurl.com/m98btmzh>

27 "It's time for a paradigm shift!" *Fararu*, July 8, 2025. <https://tinyurl.com/4tuwcfuw>

28 "From the ashes of war to a new horizon." *Shargh*, July 13, 2025. <https://tinyurl.com/mryb5k26>

The call for sweeping changes was joined by senior politicians, foremost among them former president Hassan Rouhani and his foreign minister, Mohammad Javad Zarif. In a meeting with his advisers, Rouhani urged the adoption of a new national strategy following the war with Israel. He stated that Israel and the United States had failed to achieve the two main objectives of their campaign: the overthrow of the Iranian regime and the destabilization of the Middle East. Israel had long sought to realize its "Nile-to-Euphrates" vision, while the United States had attempted to advance its goals through the "New Middle East" plan. However, once Jerusalem and Washington realized that they could not achieve their aims—and following Iran's forceful response—they were compelled to agree to a ceasefire. Nonetheless, Rouhani emphasized that Iran must prepare for the future, draw the necessary lessons from the war, compensate for its weaknesses, and strengthen its sources of power. He asserted that the country must deepen its ties with the international community and be ready for dialogue with any party interested in doing so, with the goal of reducing tensions with Europe, its neighbors, and the United States.

Rouhani also called for a renewal of the relationship between the state and its citizens, with better reflection of public opinion. He emphasized that Iran belongs to the entire Iranian people and that their will and perspectives must be heard and represented. He further stressed the need to prevent the involvement of the armed forces and intelligence services in non-security domains—including the economy, domestic affairs, and foreign policy. He urged the formulation of a new national strategy grounded in the will of the people and attentive to developments in the region and within Iran over the past two years, while addressing existing shortcomings. Developing a national strategy, strengthening national unity, and shaping a government that reflects the people's will, he argued, would help prevent another war.

Rouhani added that it was possible to assist Muslims in the region, but if concern for others were to come at the expense of the Iranian people's well-

being, it would be a mistake. He stressed that Iran must first and foremost care for its own citizens. In doing so, Rouhani expressed the "Iran First" concept, which holds that Iran must focus its efforts on tackling its internal challenges—foremost among them the economic crisis—in order to improve, over time, its ability to respond effectively to security challenges as well. According to this view, Iran should pursue an arrangement with the West on the nuclear issue that could ease sanctions, continue the trend of reducing tensions with its Arab neighbors, promote economic reconstruction and development processes, and narrow the widening gap between the regime and the broader public.<sup>29</sup>

Mohammad Javad Zarif also articulated the need for a fundamental reassessment and major shift in Iranian policy. In an article published in *Foreign Policy* in August 2025, titled "The Time for a Paradigm Shift Is Now," Zarif argued that developments in the Middle East—foremost among them the ongoing campaign in the Gaza Strip and the 12-Day War—had underscored the need for a bold diplomatic initiative and a historic transformation for Iran and the entire region. At the core of this transformation, he wrote, should be a transition from a deeply ingrained "threat paradigm" to an "empowering possibilities paradigm," based on the creation of a new regional partnership in West Asia and the renewal of dialogue with Europe and the United States.<sup>30</sup>

At a conference held in Tehran in October 2025, Zarif stated that while missiles are indeed important for Iran's security, "the people are more important," as they are the ones who have safeguarded the country throughout history and are its primary source of strength. According to him, Iran must continue to strengthen its military power, but first and foremost it must ensure the economic welfare of its people. The former foreign minister reiterated the

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29 "Hassan Rouhani's analysis of the 12-Day War: Now is the time for a new national strategy. *Asr-e Iran*, August 16, 2025. <https://tinyurl.com/spdpz8eu>

30 Mohammad Javad Zarif, "The time for a paradigm shift is now." *Foreign Policy*, August 15, 2025. <https://tinyurl.com/5n6bjyf7>

need to deepen ties with the countries of the region and to conduct diplomatic negotiations with Iran's adversaries.<sup>31</sup>

President Pezeshkian himself also expressed recognition of the need to implement significant changes in light of the lessons of the war, adopting a more pragmatic approach both domestically and in foreign policy. In a speech he delivered in August 2025, the president emphasized the importance of promoting internal unity while focusing on resolving Iran's domestic challenges, including the economic crisis, water scarcity, and the crisis of trust between the public and the regime. Pezeshkian also expressed support for dialogue with the West and made clear that negotiating with enemies is not equivalent to surrender.<sup>32</sup> However, it is important to stress that nothing in his remarks suggests that the president—who has previously voiced support for the core components of Iran's security doctrine—has retreated from his backing of the Islamic Republic's continued commitment to the "Resistance Front," and certainly not from his affirmation of the importance of Iran's strategic military capabilities, foremost among them its strategic missile arsenal, as a central deterrent.

Within the conservative camp as well, there was acknowledgment of the importance of drawing lessons from the war, particularly given the widespread assessment that a resumption of hostilities is only a matter of time, and that Israel is determined to renew the campaign—indeed, to exploit the next round to advance regime-change objectives, not merely to strike nuclear sites or missile infrastructure. Thus, for example, Safavi, an adviser to Iran's Leader, argued that Iran is merely in a stage of latent war that could reignite at any

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31 "It is possible to influence the United States / On the current state of international relations, Iran's position, and the tools at its disposal." *Ham-Mihan*, October 9, 2025. <https://tinyurl.com/mm9h39pv>

32 "Pezeshkian: I do not want to raise fuel prices for the underprivileged." *Eqtesad-e Mo'aser*, August 10, 2025. <https://tinyurl.com/43fkb56m>

moment.<sup>33</sup> However, in the radical camp, calls for a paradigm shift were rejected, and especially harsh criticism was leveled at initiatives pointing toward reform or moderation.

The newspaper *Vatan-e Emrooz* claimed that it is in fact the intellectuals' paradigm of thought that needs to change, as they remain captive to romantic illusions about the West. According to the paper, the war with Israel proved that the West recognizes only the language of force, and that Iran can survive only through forceful struggle and national resistance.<sup>34</sup> The conservative daily *Khorasan* likewise argued that although the war necessitates a reassessment of domestic and foreign policy, this should not be done on the basis of outdated modes of thinking that have already proven ineffective. The paper maintained that recommendations such as releasing political prisoners or expanding civil liberties—precisely at a time when Iran faces security challenges and Western cognitive warfare—could serve external actors seeking to undermine the Islamic Republic's social cohesion.<sup>35</sup>

The pro-regime newspaper *Kayhan* sharply criticized the "Western-leaning" (*gharb-garayan*) and argued that Western orientation is not an intellectual current but a "chronic political disease," whose symptoms include distrust in domestic capabilities, admiration for Western smiles, the denigration of the "Resistance," and the glorification of appeasement. According to the hardline daily, any talk of reconciliation is in fact synonymous with surrender, and any compromise with the West inevitably leads to destruction—as demonstrated by the historical experience of Iraq and Libya. Conceding to the West, it argued, does not bring security; rather, it encourages the enemy "to swallow the country whole." Thus, for example, Libya's ruler Muammar Qaddafi—who

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33 "Rahim Safavi's important statements regarding the Israeli attack on Iran: I estimate there is a possibility of another war." *Khabar Online*, August 17, 2025. <https://tinyurl.com/yd4kzhwt>

34 "The time has come to change the paradigm of Iranian intellectuals." *Vatan-e Emrooz*, July 9, 2025. <https://tinyurl.com/4y9knz5m>

35 "A return to repetitive paradigms." *Khorasan*, July 9, 2025. <https://tinyurl.com/heavtw48>



believed that relinquishing his nuclear program would end Western hostility—received in return NATO’s bombings of Tripoli and his own elimination. These are, *Kayhan* maintained, living warnings to anyone seeking to sell Iran a formula for accommodation.<sup>36</sup>

Senior IRGC official Yadollah Javani likewise rejected calls to adopt a more conciliatory approach following the war. In a speech delivered at a conference of Basij militia members in Mashhad, Javani stated that the recent war proved that the discourse of resistance is effective and well-grounded, whereas the theory of appeasement leads nowhere. According to him, universities, lecturers, and the media must explain to the younger generation that Iran can progress only through resistance and reliance on its internal capabilities in all fields—science and technology, medicine and industry, as well as defense and security. He criticized those who cast doubt on the abilities of the Iranian people and who, instead of relying on domestic resources, propose adopting foreign models, fundamentally altering policy, negotiating with the United States, and returning to agreements that undermine Iran’s independence and capabilities. Presenting such approaches in Iran—after it has won the war and succeeded in establishing superiority on the battlefield—constitutes a grave danger, he argued, since the enemy still seeks to limit Iran in the areas of missiles, nuclear capabilities, and regional influence; any retreat under current conditions would give the enemy an opportunity to pursue these goals.<sup>37</sup>

The internal debate over the lessons to be drawn from the war reflects a longstanding, bitter discourse between the country’s principal political camps, which themselves are not monolithic: conservative-hardliners versus pragmatist-reformists. Moreover, the reformists see the current moment—a

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36 “Crocodile tears for Gaza, or a recipe for surrender for Iran.” *Kayhan*, October 5, 2025. <https://tinyurl.com/2t4cthhk>

37 “Political Deputy of the IRGC: The recent war proved that the theory of compromise will lead nowhere.” *Asr-e Iran*, September 1, 2025. <https://tinyurl.com/23m4t2eb>

period of drawing lessons from the upheaval that struck the Islamic Republic—as a renewed opportunity to strengthen their political standing after having been excluded from decision-making processes in recent years. Nevertheless, it is important to emphasize that Tehran's governing institutions remain largely controlled by the conservatives. At this stage, there is no indication of any substantial change in the political structure or in the balance of power at the top of the regime, and it is doubtful that fundamental transformations aligned with the reformists' calls for conceptual change can occur so long as there is no shift in the regime leadership—particularly no change of the Supreme Leader.

Furthermore, even the reformists do not generally advocate major concessions on core strategic issues, including support for the "Resistance Front," continued development of the missile program, and Iran's right to enrich uranium on its own soil, but at most certain adjustments in the national order of priorities.

## CHAPTER 2

# NUCLEAR AMBIGUITY AT A DECISION POINT

### **The Status of Iran's Nuclear Program After the War**

On the eve of the war, Iran was a nuclear-threshold state with the ability to complete the enrichment of its existing uranium stockpile to 90%—fissile-weapon-grade material—within less than two weeks of a decision, and likely only a few months away from achieving an initial military nuclear capability. This capability was intended to provide deterrence against its enemies and serve as an insurance policy for regime survival. Nonetheless, Iran's Leader refrained from ordering the breakout to nuclear weapons, apparently out of concern that such a move would drag Iran into a military confrontation with Israel and—worse—with the United States. For years, Iran preferred gradual and safer progress on the nuclear track over the fastest possible route.

The war significantly set back the Iranian nuclear program. Israeli and American strikes severely damaged the three main facilities tied to uranium enrichment, to the point that their rehabilitation is highly uncertain.<sup>38</sup> The Natanz enrichment plant—the central site, which housed thousands of centrifuges, both older models and advanced types—was heavily damaged. It appears to be completely inoperable, and roughly 15,000 operational centrifuges were likely destroyed. The underground Fordow enrichment facility, where advanced centrifuges had been installed and performed enrichment to 60%, was also apparently seriously damaged in the American strike, although no conclusive open-source information exists regarding the extent of the

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38 Raz Zimmt and Tamir Hayman, “Between a nuclear agreement and active containment: Israel and Iran’s nuclear program after the war,” *Institute for National Security Studies (INSS)*, Policy Paper, July 20, 2025. <https://tinyurl.com/4f2ybed8>

damage to its enrichment capabilities. Moreover, some reports cast doubt on the degree of destruction to the centrifuge halls at the site.<sup>39</sup>

The Nuclear Technology Center in Isfahan was also likely severely damaged. This center was used to convert uranium compounds from “yellowcake” into uranium hexafluoride (UF<sub>6</sub>)—the feedstock required for enrichment—and to reconvert UF<sub>6</sub> into metallic uranium used to create a fissile core for a nuclear weapon. Most operational centrifuges at Isfahan were apparently destroyed, and Iran’s capacity to manufacture additional centrifuges was also damaged, though the extensive knowledge and experience in this field remain intact.

The war left Iran with residual capabilities that could be used to rebuild the program—and even to pursue the breakout to nuclear weapons. Iran retained at least several hundred centrifuges, including some that had been manufactured but not yet installed in the two enrichment facilities before the war. It should be noted that since February 2021, Iran has not allowed the International Atomic Energy Agency (IAEA) to monitor the production or storage of centrifuges. In addition, Iran still possesses a stockpile of over 400 kg of uranium enriched to 60%, which it held before the war. It is unclear whether this material was removed from the declared sites and dispersed to hidden locations, or whether it remained in one or more of the facilities that were struck—and to what extent it can be used. Moreover, smaller quantities of lower-enriched uranium likely remain as well.

Shortly after the war, a senior Israeli official estimated in an interview with *The New York Times* that at least some of the fissile material survived the strikes but is now buried under Natanz and Fordow, and that “nothing was moved.” He expressed confidence that any Iranian attempt to extract

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39 James Glanz, Samuel Granados, Junho Kee, Eric Schmitt & Marco Hernandez, “The invisible target in Iran.” *The New York Times*, August 20, 2025. <https://tinyurl.com/3x3a4sxh>

the uranium would likely be detected and would trigger another strike.<sup>40</sup> In August 2025, Prime Minister Benjamin Netanyahu confirmed that Iran still had 400 kg of enriched uranium, but emphasized that it had been known in advance that the uranium would not be destroyed and that this alone is not sufficient to produce nuclear weapons.<sup>41</sup> Iranian Foreign Minister Araghchi also acknowledged that the remaining fissile material was buried “beneath the rubble” of the nuclear facilities struck by Israel and the United States.<sup>42</sup>

In principle, Iran’s remaining capabilities could allow it in the future to enrich uranium to 90% at a covert site. Such enrichment does not necessarily require multiple cascades; one or two cascades of advanced centrifuges (100–200 machines) may suffice. The process could take place over several weeks, especially if Iran opts for an accelerated emergency program and if a covert facility—or several small decentralized ones—has already been prepared. Iran could also reconvert  $UF_6$  into metallic uranium at alternative sites, such as university chemistry labs or chemical plants, and it is possible that infrastructure for such sites has already been established. If carried out covertly and without adherence to safety protocols, the process could take a few months at most. A key challenge would be transporting the remaining fissile material to the relevant conversion sites.

A nuclear breakout would be more complex. It is unclear how far Iran had advanced before the war regarding the assembly of an explosive device, though it is evident that significant progress had been achieved and that Iran possessed the necessary technical know-how. Nor is it known how the war affected Iran’s progress in producing the detonation mechanism.

40 David E. Sanger, “Some of Iran’s enriched uranium survived attacks, Israeli official says,” *The New York Times*, July 10, 2025. <https://tinyurl.com/njxc49as>

41 Netanyahu in an exclusive interview with i24NEWS: “Iran has 400 kg of enriched uranium left; we knew in advance it would not be destroyed.” *i24NEWS*, August 12, 2025. <https://tinyurl.com/4k23pbcs>

42 AFP, “Iran says enriched nuclear material ‘under rubble’ of facilities hit amid Israel war.” *Times of Israel*, September 12, 2025. <https://tinyurl.com/2s9jv6mm>

Several facilities tied to the weaponization program—including the Parchin complex and the headquarters of the Organization of Defensive Innovation and Research (SPND) in Tehran—were struck during the war, but the extent of the damage is unclear. A disruption in one stage of the weaponization process could delay the entire chain, though the duration of any such delay is unknown.

The targeted killing of more than ten senior nuclear scientists—who served as key repositories of expertise in weaponization fields—has also had a significant impact on Iran’s nuclear knowledge base and potentially on its ability to recruit qualified scientists in the future. Although a pool of personnel in relevant fields exists who could replace some of those eliminated, this pool likely lacks comparable experience and expertise. Iran may therefore choose to pursue a faster, less orderly, and less safety-conscious path than would be considered acceptable in the West. In any case, a conservative assumption must be adopted: if Iran makes the decision, it could advance toward a nuclear weapon through a covert and decentralized program distributed across multiple sites, even if a fully operational capability—including ballistic missiles with nuclear warheads—would not be feasible in the short term.

### **Iran’s Nuclear Dilemma**

We can assume that Iran’s motivation to obtain nuclear weapons has increased in light of the lessons of the war, which further exposed the failure of its deterrence against Israel and the United States. Like most components of Iran’s strategic power, the nuclear program began during the Shah’s era. After the Islamic Revolution, the program was frozen by order of Ayatollah Khomeini, who viewed it as incompatible with his conception of the spirit of Islam.

However, the Iran–Iraq War prompted the Iranian regime to renew its nuclear effort in the mid-1980s, following the severe blow Iran suffered during the war and Iraq’s use of chemical weapons and missiles against it. For years, senior Iranian officials repeatedly stated that Iran was not developing

nuclear weapons and would never seek to do so, because they believed such weapons were not useful and because Iran's Leader deemed them religiously forbidden. Nevertheless, Khamenei has never retreated from his position that a military nuclear-threshold capability would provide Iran with effective deterrence against its enemies, and is therefore essential for ensuring the regime's survival. He has also not changed his long-standing assessment that the nuclear issue serves merely as a pretext for the West to pressure, isolate, and weaken Iran in preparation for achieving its central strategic objective: regime change.

Furthermore, the 2003 decision by Libya's former leader Muammar Qaddafi to dismantle his country's nuclear program—an act that did not prevent his eventual overthrow with Western support—has been cited by Khamenei as evidence that Iran is right to refuse capitulation to Western demands in exchange for Western incentives. Similarly, the contrast between the immunity enjoyed by nuclear-armed North Korea and the fate of Saddam Hussein, who possessed no such weapons, is seen in Iran as further proof of the necessity of nuclear weapons alongside other strategic assets, foremost among them Iran's long-range missile force.

The regional developments that have unfolded since October 7, 2023—above all the weakening of Hamas, the decisive defeat of Hezbollah, and the fall of the Assad regime—have presented the Islamic Republic with growing security challenges and have cast doubt on the validity of its security doctrine, particularly on the effectiveness of two of its key pillars of deterrence: the proxy network and its strategic military capabilities (ballistic missiles and UAVs). The collapse of the proxy network and Iran's failure to deter Israel through its strategic missile arsenal have intensified doubts regarding Tehran's ability to counter Israel's military superiority and deter it from further action against Iran.<sup>43</sup>

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43 Raz Zimmt, "Toward possible changes in Iran's security concept," *Institute for National Security Studies INSS Insight*, No. 1915, November 18, 2024 <https://tinyurl.com/yf5uw2u5>



Against this backdrop, an increasing number of voices in Iran have argued that deterrence must be strengthened—including through a change in nuclear doctrine and consideration of a breakthrough to nuclear weapons, which would provide the ultimate “insurance policy” against Israel and the United States. As Iran continued its efforts to advance and entrench its nuclear-threshold status, and possibly to shorten its breakthrough time, senior Iranian officials called for a reassessment of nuclear strategy and for no longer being satisfied with threshold status alone. For example, in February 2024, former foreign minister and former head of the Atomic Energy Organization of Iran, Ali Akbar Salehi, stated that the regime possessed all the components needed for a nuclear weapon, though they had not yet been assembled.<sup>44</sup>

In October 2024, dozens of members of parliament sent a formal letter to the Supreme National Security Council calling for a revision of the Islamic Republic’s defense doctrine regarding the nuclear program.<sup>45</sup> On October 26, 2024, the chairman of the Strategic Council on Foreign Relations, Kamal Kharazi, declared that revising the nuclear doctrine remained an option should Iran face an existential threat. He stressed that the technical capabilities for producing nuclear weapons already existed, and that only the Leader’s judgment prevented their realization.<sup>46</sup>

Until the outbreak of the war with Israel, there had been no indication that the Iranian leadership under Khamenei had decided to alter its nuclear strategy and move toward nuclear weapons. However, the public statements in Iran supporting a reconsideration of its nuclear strategy suggest that the issue was also being discussed within the corridors of power in Tehran. Since the war, the voices supporting a nuclear breakthrough as a necessary consequence

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44 “Iran signals it is closer to building nuclear weapons.” *Iran International*, February 12, 2024. <https://tinyurl.com/yrmxnkj6>

45 “Iran MPs call for nuclear deterrence amid tensions with Israel.” *Iran International*, October 9, 2024. <https://tinyurl.com/yc686ysd>

46 “Iran adviser hints at expansion of missile range, nuclear doctrine review after Israel strikes.” *Reuters*, November 1, 2024. <https://tinyurl.com/2kk2w83k>

of the Israeli–American attack, have grown stronger. In September 2025, seventy-one members of the Majles called for the development of nuclear weapons following the 12-Day War. In a letter sent to Iran’s president and the Supreme National Security Council, the lawmakers argued that Iran’s defense doctrine must be reassessed, and that the development and possession of nuclear weapons had become necessary in light of the attack.<sup>47</sup> Ahmad Naderi, a member of the Majles Presidium, asserted that the only way to safeguard Iran’s territorial integrity and national security was through the acquisition of nuclear weapons. According to him, withdrawing from the Nuclear Non-Proliferation Treaty (NPT), adopting a policy of ambiguity, and ultimately conducting a nuclear test were the only options that could prevent Iran from meeting the fate of Iraq and Libya.<sup>48</sup>

Another expression of Iran’s rethinking regarding its nuclear doctrine appeared in remarks by the Leader’s adviser and former defense minister, Ali Shamkhani, who said in an interview on Iranian television that if he could return to the 1990s, when he served as defense minister in the government of President Mohammad Khatami, he would support the development of a nuclear bomb. According to him, the war proved that Iran should have equipped itself with nuclear weapons.<sup>49</sup>

An article that appeared on the *Iranian Diplomacy* website (and has since been removed) likewise argued that the only way to prevent another attack was the rapid unveiling of a nuclear weapon. Even if the 400 kilograms of uranium enriched to 60% were destroyed in the strikes, the article’s author, Mohammad Monsan, argued that Iran should declare that it had obtained a nuclear weapon—even implicitly. The article stated that global experience

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47 “Iranian lawmakers urge review of defense doctrine, call for nuclear weapons.” *Iran International*, September 22, 2025. <https://tinyurl.com/tudpmz7m>

48 Ahmad Naderi’s X (Twitter) account, September 19, 2025. <https://tinyurl.com/t8ww3atc>

49 “Shamkhani: I wish that when I was defense minister, I had pursued nuclear weapons. *Asr-e Iran*, October 15, 2025. <https://tinyurl.com/593fruav>

demonstrates the power of nuclear deterrence. It cited, among other things, remarks by President Trump during a meeting with Russian President Vladimir Putin in August 2025, in which Trump reportedly said that the United States would not fight a state equipped with nuclear weapons. It also quoted a past observation by former U.S. Secretary of State Mike Pompeo distinguishing between U.S. policy toward North Korea and its policy toward Iran, based on the fact that North Korea has nuclear weapons capable of striking the United States. According to the website, Iran has never fully understood the importance of nuclear deterrence, and continuation of the current policy could lead to further and even more severe attacks.<sup>50</sup>

In early July 2025, President Pezeshkian approved the law suspending cooperation with the International Atomic Energy Agency (IAEA). The law, approved earlier by the Majles and subsequently by the Guardian Council, effectively halted inspections and the submission of reports to the IAEA until the security of Iran's nuclear sites could be guaranteed.<sup>51</sup> On September 9, 2025, IAEA Director General Rafael Grossi and Iranian Foreign Minister Abbas Araghchi signed an agreement intended to pave the way for renewed IAEA inspections at Iranian nuclear sites.<sup>52</sup> However, following the activation of the snapback mechanism against Iran at the end of September—which reimposed all UN Security Council sanctions lifted under the 2015 nuclear deal—the Iranian foreign minister announced that the Cairo agreement was no longer valid.<sup>53</sup>

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50 “The potential future war will last three to six days, not a war of attrition!” *Atlas Diplomacy*, September 8, 2025. <https://tinyurl.com/4d85dfx3>

51 “After its nuclear facilities were struck by Israel and the U.S., Iran froze its cooperation with the IAEA.” *Haaretz*, July 2, 2025. <https://tinyurl.com/5esv3c7t>

52 “Iran will allow IAEA inspectors to enter its territory.” *Yedioth Ahronoth*, September 10, 2025. <https://tinyurl.com/6wavwbun>

53 “Cairo deal with IAEA ‘no longer valid’ after UN snapback sanctions: Iran.” *TRT World*, October 5, 2025. <https://tinyurl.com/439hm29s>

Although Iran's motivation to obtain nuclear weapons has increased, a decision to breakthrough remains dangerous in light of the possibility of further military action by Israel or the United States, the proven penetration of Western intelligence into the nuclear program, and Israel's (and possibly America's) resolve to use force again—potentially even at the risk of threatening the regime's survival—to prevent Iran from rebuilding nuclear infrastructure, let alone achieving a weapon.

In light of this dilemma, a public debate has emerged in Iran since the end of the war regarding the possibility of adopting a policy of nuclear ambiguity—avoiding the release of official information about Iran's nuclear capabilities. As with other contentious issues, this topic has sparked disagreement between conservative circles and more pragmatic ones. Commentator Hamid-Reza Esmaeili Nejad argued in an article on *Iranian Diplomacy* that the most recent war proved the time had come for Iran to withdraw from the Nuclear Non-Proliferation Treaty (NPT) and adopt a policy of nuclear ambiguity. According to him, the restrictions Iran accepted under the 2015 nuclear agreement neither resolved the crisis nor prevented an attack against Iran, contrary to international law. Therefore, Iran must act without fear and in accordance with its national interest: withdraw from the treaty and adopt ambiguity as a bargaining chip and instrument of pressure in future negotiations with the Trump administration.<sup>54</sup>

Journalist and commentator Nejad Mohammad Ali also proposed adopting a policy of ambiguity: ending cooperation with the IAEA, refraining from publishing information on the extent of the damage to Iran's nuclear program, and creating doubts among adversaries regarding Iran's nuclear capabilities—doubts that could strengthen Iranian deterrence. In his view, when IAEA cameras become tools of espionage and the information Iran provides is used for assassinations of nuclear scientists, transparency is not an advantage

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54 “The time has come to withdraw from the NPT and adopt a policy of nuclear ambiguity. *Iranian Diplomacy*, July 6, 2025. <https://tinyurl.com/58ss8nsk>

but “intelligence suicide.” Therefore, ambiguity should be preferred, as it would deter the enemy by generating concern that Iran is close to nuclear breakthrough—or may have already crossed the threshold. Ambiguity, he argued, can serve as a weapon in Iran’s hands and also assist diplomacy by compelling the other side to act cautiously and avoid dictating demands.<sup>55</sup>

In contrast, voices within the pragmatic camp warned of the dangers involved in adopting a policy of nuclear ambiguity. The reformist daily *Shargh* cautioned that such a move—intended to compel the West and Israel to refrain from further attacks and to extract concessions in negotiations—might produce the opposite result. The paper cited two test cases: Iraq and Libya. Iraq, which chose ambiguity regarding its unconventional capabilities after the 1991 Gulf War and refused to cooperate with IAEA inspectors, aroused the suspicion of the United States and its allies, leading to the American invasion in 2003. Libya denied the existence of a nuclear program, though it hinted at it while advancing the program covertly, and ultimately was forced to admit to it and agree to dismantlement eight months after the U.S. invasion of Iraq. The paper warned that in Iran’s case too, a policy of ambiguity could lead to instability, prolonged low-intensity conflict, or even the resumption of full-scale war. Unlike North Korea, which could afford ambiguity until its 2006 nuclear test, Iran operates in the heart of a volatile region, is in direct confrontation with Israel, and lacks significant counterintelligence capabilities that would allow it to maintain ambiguity over time.<sup>56</sup>

At this stage, there is no evidence of Iranian efforts to rebuild the three key nuclear facilities damaged in the attacks (Natanz, Fordow, and Isfahan) or to breakout toward a nuclear weapon. In late October 2025, IAEA Director General Rafael Grossi reported that Iran was not enriching uranium at that time, but added that inspectors had recently detected activity around the sites

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55 “Iran’s nuclear-ambiguity strategy in the face of espionage and aggression. *Seday-e Sima*, July 3, 2025. <https://tinyurl.com/58ss8nsk>

56 “Strategic nuclear ambiguity?” *Shargh*, July 2, 2025. <https://tinyurl.com/2u6ub33u>

where Iran's remaining stockpile of 60%-enriched uranium is held.<sup>57</sup> Satellite imagery published by the Institute for Science and International Security (ISIS) in August 2025 revealed significant Iranian efforts to quickly demolish structures damaged or destroyed at the Mojdeh site (Lavisian-2), located near Malek Ashtar University in Tehran, which was bombed twice during the war. According to the Institute, the clearing and demolition activities were intended to limit access for future inspections aimed at uncovering evidence of weapons-related research and development.<sup>58</sup> Satellite images from late September 2025 revealed renewed activity at the tunnel complex in Isfahan, which was struck during the war. The activity included clearing debris and removing rubble from two of the three entrances to the complex using heavy machinery—apparently to allow controlled access and to reinforce the entrances against possible future attacks. However, the activity did not indicate the removal of centrifuges or enriched uranium stockpiles from the site.<sup>59</sup>

Satellite imagery released in September 2025 revealed even more troubling developments: Iranian activity aimed at accelerating construction at an underground site in “Pickaxe Mountain” (Kuh-e Kolang Gazleh), intended to serve as a centrifuge-assembly facility. The images showed heavy machinery and clear evidence of expanded construction and security measures at the site, which may be used as a center for centrifuge development or for storing enriched uranium. Among other things, Iran appears to be reinforcing its engineering defenses there—using concrete, strengthening tunnel openings,

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57 Farnoush Amiri, “Iran isn’t actively enriching uranium but movement detected near nuclear sites, UN official tells AP.” *Associated Press*, October 29, 2025. <https://tinyurl.com/yc5ky32d>

58 David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, “Imagery shows sanitization effort at the attacked Mojdeh site a.k.a. the ‘Lavisian 2’ Campus.” *Institute for Science and International Security*, August 27, 2025. <https://tinyurl.com/4tdvjz5y>

59 David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, “Imagery update on the Esfahan Tunnel Complex.” *Institute for Science and International Security*, October 16, 2025. <https://tinyurl.com/mrdvjnfm>

and expanding excavation work.<sup>60</sup> This activity may indicate an intention to increase protection of the assets remaining at the facility or to gradually render it operational for new capabilities, including enrichment.<sup>61</sup>

Construction activity was also detected at the Taleghan-2 nuclear research site in the Parchin military complex, which was struck by Israel on October 25, 2024. The Institute for Science and International Security assessed that Iran had covered two of the buildings in the compound with earth, apparently to increase their survivability in the event of future Israeli strikes.<sup>62</sup>

Nevertheless, Iran has so far refrained from carrying out its threats to withdraw from the NPT following the activation of the snapback mechanism, even though it is not allowing IAEA inspections at the damaged nuclear sites and is not providing information about the fissile material that remains in its possession. These threats have largely lost operational significance given the extensive damage to the nuclear sites and Iran's refusal to resume IAEA monitoring. In October 2025, Mohammad Eslami, head of the Atomic Energy Organization of Iran (AEOI), stated that withdrawal from the treaty was not on the government's agenda. He added, however, that Iran would not resume cooperation with the IAEA unless the agency met two conditions set by the Majles: condemning the attack on Iran's nuclear facilities and committing to protect all information related to Iran's nuclear industry.<sup>63</sup> Still, it cannot

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60 David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, "Update on Iran's Mountain Facilities South of the Natanz Enrichment Plant." *Institute for Science and International Security*, October 3, 2025. <https://tinyurl.com/6p7dx9jy>

61 Joseph Rodgers and Joseph Bermudez, "CSIS satellite imagery analysis reveals possible signs of renewed nuclear activity in Iran." *Center for Strategic and International Studies*, October 27, 2025. <https://tinyurl.com/3chwy7ty>

62 David Albright, Sarah Burkhard, Spencer Faragasso, and the Good ISIS Team, "New construction identified at Taleghan 2, a former AMAD plan nuclear weapons development site." *Institute for Science and International Security*, October 20, 2025. <https://tinyurl.com/ykekpvyp>

63 "Eslami: Withdrawal from the NPT is not on the agenda." *Fararu*, October 15, 2025. <https://tinyurl.com/5anc365y>



be ruled out that Iran may eventually decide to leave the NPT as a final step before conducting a nuclear test, once all necessary preparations for a breakout are complete.

In any case, Iranian officials have emphasized that the authority to decide on withdrawal from the NPT belongs exclusively to the Leader and the Supreme National Security Council. Former AEOI head Ali Akbar Salehi stated that the decision rests solely with the Leader.<sup>64</sup> Member of parliament Esmaeil Kowsari similarly stressed that the final decision lies with the Supreme National Security Council, and that Iran has a variety of legal and political options in response to the snapback.<sup>65</sup> Meanwhile, figures associated with the pragmatic camp warned of the consequences of such a withdrawal. In their view, the uncompromising approach of the radical factions has already caused Iran significant damage, and steps such as exiting the treaty would only worsen Iran's situation and turn it into an isolated state—similar to North Korea.

Former chairman of the Majles National Security and Foreign Policy Committee, Heshmatollah Falahatpisheh, argued that leaving the NPT would only provide Iran's adversaries with excuses to escalate sanctions and military pressure. He added that the proposals put forward by radical Iranian elements differ little from those advocated by Benjamin Netanyahu and his supporters, and that the Iranian people would ultimately pay the price for their implementation.<sup>66</sup> The reformist daily *Shargh* likewise warned that withdrawing from the treaty, halting cooperation with the IAEA, or even closing the Strait of Hormuz—as demanded by some hardline factions—would not change the fundamental dynamics of the nuclear issue and would only heighten tensions with the West. According to the paper, advancing such

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64 “Only Khamenei can decide on Iranian exit from NPT, former official says.” *Iran International*, August 29, 2025. <https://tinyurl.com/yeweeav2>

65 “Parliament to back NPT withdrawal following snapback.” *Tehran Times*, September 3, 2025. <https://tinyurl.com/j46my24t>

66 Falahatpisheh: Leaving the NPT and closing the Strait of Hormuz are no different from Netanyahu's plans. *Fararu*, August 30, 2025. <https://tinyurl.com/ynz33x65>

ideas increases pressure on the government, intensifies internal polarization, and reduces the likelihood of future negotiations—at a time when Iranian citizens are already suffering from the severe economic crisis.<sup>67</sup>

Meanwhile, the question of whether to resume negotiations with Washington on a nuclear agreement—talks that were interrupted on the eve of their sixth round by the Israeli attack—remains unresolved, and it appears that the two countries continue to exchange messages. It is unclear whether Iran is interested at this stage in returning to a negotiated framework, certainly not one that would require concessions perceived in Tehran as capitulation to American dictates, chiefly the elimination of enrichment on Iranian soil and limits on its missile program. From Iran's perspective, the American insistence on imposing significant restrictions on the nuclear and missile programs amounts to demands for total surrender.

AEOI head Mohammad Eslami emphasized in an interview with Sky News that Iran needs high-level enrichment for sensitive equipment and precision measurement systems that no country is willing to sell to it.<sup>68</sup> Moreover, it is doubtful that Iran would accept an intrusive inspection regime by the IAEA, which Iranian officials accuse of collaborating with Israel and the United States and of providing the basis for attacks on Iranian facilities. It is also unclear whether Iran's Leader is willing to return to the negotiating table with the American administration, which he believes deceived Iran and proved once again that it cannot be trusted. In his view, the war only strengthened his conviction that Iran's nuclear and missile programs serve merely as a pretext for the United States to weaken and subdue Iran. Nevertheless, Khamenei may agree to resume negotiations—and even to a political arrangement—under certain conditions, including guarantees that Iran will not be attacked

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67 “Withdrawal from the NPT: Deterrence or Isolation?” *Shargh*, September 3, 2025. <https://tinyurl.com/mryy22pn>

68 Alistair Bunkall, “Some of Iran's nuclear facilities were ‘destroyed’ by US strikes, nuclear chief admits.” *Sky News*, September 24, 2025. <https://tinyurl.com/ye2y78vm>

again, significant economic relief through extensive sanctions easing and the release of frozen Iranian assets abroad, and possibly to buy time (perhaps until the end of President Trump's term).

A particularly dangerous scenario would be Tehran's adoption of a diplomatic track as a ruse—its purpose being to mask parallel progress toward a bomb through a covert program (the North Korean model). In any case, at this stage it appears that the maximum concessions Iran is prepared to offer in negotiations with the United States do not match even the minimum concessions the Trump administration is willing to accept.

Meanwhile, Iran continues to advance its civilian nuclear program in cooperation with Russia. Russia's official position remains opposed to Iranian nuclear-weapons development, yet it is willing to assist Iran in constructing nuclear power plants. In September 2025, Iran announced a massive \$25-billion deal under which the Russian nuclear corporation Rosatom is expected to build four new nuclear reactors in the coming years, similar to the Bushehr reactor constructed by Russia and operational since 2010.<sup>69</sup> In early October 2025, a Russian delegation led by Nikolai Spassky, Rosatom's Deputy Director General for International Relations, visited Tehran and held detailed discussions with senior officials of the Atomic Energy Organization of Iran on a wide range of nuclear topics, including expanded cooperation on the development of small modular reactors and the construction of 1,250-megawatt reactors. During the visit, it was decided that Rosatom CEO Alexei Likhachev would travel to Iran in the near future to closely monitor progress on the construction of the second and third units at the Bushehr plant.<sup>70</sup>

As of this writing, it appears that fear of an Israeli–American response is leading the regime—at least for now—to prioritize the restoration and

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69 “Iran and Russia sign \$25 billion agreement to build four nuclear power plants in Iran, IRNA says.” *Reuters*, September 26, 2025. <https://tinyurl.com/5n8kxdw8>

70 “Extensive talks between Iran and Russia on developing small-scale nuclear reactors.” *Mehr News Agency*, October 9, 2025. <https://tinyurl.com/474mwpd5>

improvement of its missile forces, air defenses, and civil-defense preparedness over the breakout to nuclear weapons. Lacking good options for escaping the current crisis, Tehran is trying to buy time by avoiding provocative steps and maintaining nuclear ambiguity through limiting IAEA inspections and withholding information on the nuclear capabilities that survived the war. However, it is doubtful that the current status quo can hold for long, especially given the heavy economic price Iran continues to pay and the danger of miscalculation vis-à-vis Israel.

## CHAPTER 3

# REBUILDING STRATEGIC MILITARY CAPACITY

### Learning Lessons Regarding Military Capabilities

Israel's<sup>71</sup> and the United States'<sup>72</sup> repeated declarations of their readiness to strike Iran again have reinforced, in Tehran's view, the need to strengthen preparations for the possibility of future attacks. Since the end of the war, Iran has intensified efforts to rebuild and upgrade its military systems—particularly its missile forces and air-defense capabilities—as part of preparing for a potential renewal of hostilities. Over recent decades, Iran's buildup of strategic military capabilities, including ballistic missiles and UAVs, alongside its proxy network, its use of terrorism, and its cyber capabilities, has enabled it to compensate for its conventional military weaknesses. Iran's diverse ballistic-missile program is a direct outgrowth of the Iran–Iraq War, which underscored the need for improved deterrence and self-reliance. From Iran's perspective, ballistic missiles offer an accessible, rapid, and effective means of deterrence, power projection, and punishment.

The escalation of tensions with Israel further strengthened Iran's perception of the need to develop strategic military capabilities to confront Israel's superior military power. For years, Tehran preferred to operate against Israel through its proxies in the Middle East, thereby avoiding direct responsibility and reducing the risks associated with a direct military confrontation with Israel—or with the United States. This method of operation was designed to deter Israel, erode its resolve, and surround it with a “ring of fire,” while preserving significant deniability and immunity for Iran. Nevertheless, over the past decade the IRGC has initiated offensive actions against Israel using

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71 “Netanyahu told Trump: If necessary, we will strike Iran again” | This is how the president responded.” *Ynet*, July 12, 2025. <https://tinyurl.com/5ayzrvte>

72 “Trump again claimed that Iran's nuclear sites were ‘destroyed’: ‘We will strike again if necessary.’” *Ynet*, July 22, 2025. <https://tinyurl.com/mrxxk9t4>

UAVs and rockets launched from Syrian territory. For example, in May 2018, the IRGC launched more than 30 rockets from Syria toward IDF positions on the Golan Heights, in response to the killing of IRGC fighters in an IDF strike in late April 2018.<sup>73</sup>

A significant shift in the rules of engagement between the two states first became evident during Iran's attack on Israel on the night of April 13–14, 2024, carried out in retaliation for the killing of Hassan Mahdavi, commander of IRGC forces in Syria and Lebanon, in a strike near the Iranian embassy compound in Damascus on April 1, 2024. The large-scale missile and UAV attack signaled a new phase in the strategic confrontation between Iran and Israel. On October 1, 2024, Iran launched approximately 180 ballistic missiles at Israel following the killing in Beirut of Hezbollah Secretary-General Hassan Nasrallah and senior IRGC Quds Force commander Abbas Nilforoushan. Iranian authorities portrayed both strikes on Israel—"True Promise 1" on April 13–14 and "True Promise 2" on October 1—as significant successes, despite Israel's interception of most incoming projectiles. Even so, these attacks reinforced doubts in Tehran about its ability to provide an effective response to Israel's superior air and intelligence capabilities—both defensively and offensively—and to impose a new deterrence equation that would prevent Israel from continuing operations against Iran and the pro-Iranian axis. These doubts only grew following Israel's strike inside Iran on October 26, 2024, which caused substantial damage to Iran's air-defense network and its ballistic-missile production infrastructure.<sup>74</sup>

During the 12-Day War, Iran launched large, dense barrages of long-range ballistic missiles (approximately 500 in total) and explosive UAVs (roughly 1,000 in total) toward Israel. Israel's air-defense systems succeeded in intercepting

73 Shay Nir, "Escalation in the North / Iran fired rockets at IDF positions on the Golan Heights; the IDF struck in Syria," *Davar*, May 10, 2018. <https://tinyurl.com/47hhmep9>

74 Raz Zimmt, "Toward possible changes in Iran's security concept." *INSS Insight*, No. 1915, November 18, 2024. <https://tinyurl.com/yf5uw2u5>

and downing more than 80% of the ballistic missiles (63 missiles managed to penetrate the defenses) and more than 99% of the explosive UAVs (only one UAV succeeded in penetrating Israeli defenses, striking a building in the north). The missile strikes resulted in the deaths of 28 people, caused extensive damage to hundreds of buildings, and left thousands homeless. The Iranian missiles also struck critical infrastructure, including Soroka Hospital in Be'er Sheva, the Bazan petrochemical facility in Haifa, and the Weizmann Institute of Science in Rehovot—and, according to foreign sources, several military installations as well.<sup>75</sup>

Israel achieved air superiority over Iran within just a few days of fighting, despite Iran's decades-long effort to improve its air defenses, both by purchasing advanced Russian systems—including S-300 batteries—and by developing domestic surface-to-air missile systems. The failure of Iran's air-defense arsenal was largely due to the gradual erosion of its capabilities following Israel's response to the Iranian missile and UAV attack on April 1, 2024, which included the destruction of the radar of an S-300 battery near Isfahan. The broader Israeli strike campaign that followed Iran's second attack in October 2024 led to the destruction of all remaining Iranian S-300 batteries. Vulnerabilities in Iran's air-defense capability also stemmed from communication gaps between early-warning sensors and missile batteries.<sup>76</sup>

Brigadier General Mahmoud Mousavi, deputy chief of the Iranian army's Operations Directorate, acknowledged after the war that parts of Iran's air-defense systems had been damaged, though he claimed that they were replaced with reserve systems stored in advance at suitable locations.<sup>77</sup> The

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75 Arie Aviram, "Operation 'Am Kalavia': Review of the missile systems and explosive UAVs fired by Iran at Israel." *INSS, Technological Platform*, October 23, 2025. <https://tinyurl.com/55ewd6m8>

76 Sam Lair, "Shallow ramparts: Air and missile defenses in the June 2025 Israel-Iran war." *Foreign Policy Research Institute*, October 17, 2025. <https://tinyurl.com/5e985jkw>

77 "Deputy Chief of Army operations: Damaged air defense systems have been replaced." *Defa Press*, July 20, 2025. <https://tinyurl.com/2n7wyzz2>



absence of an effective air-defense array enabled Israel to strike Iran's missile launchers and the entrances to underground missile bases, damaging Iran's missile-launch capabilities. The 12-Day War severely damaged Iran's missile production lines, missile launchers, and the advanced missiles themselves.<sup>78</sup>

These losses—together with Israel's success in intercepting the vast majority of missiles launched during the war and the clear air superiority displayed by the Israeli Air Force—reinforced in Iran the need to draw lessons from the conflict, despite Iranian officials' inflated claims regarding the “success” of Iran's missile array in causing significant damage to Israel. From Iran's perspective, the 12-Day War demonstrated that its missile arsenal is a strategic asset that can serve both as a source of deterrence against Israel and as a means of delivering effective retaliation. Moreover, missiles can be used to exhaust Israel and limit its ability to sustain a prolonged campaign, given the constraints on Israel's interception capacity. Iran's Supreme Leader expressed satisfaction with its missile performance, declaring in an October 2025 speech that the Zionists did not expect Iranian missiles to penetrate deep into their sensitive and important centers and destroy them.<sup>79</sup>

Commentary published on Tasnim News Agency's website, which is affiliated with the IRGC, emphasized the need to strengthen reliance on missile capabilities as a means of deterring Israel in case fighting resumes. The article asserted that few doubt that the current ceasefire is merely temporary, and therefore Iran must bolster its deterrent capacity through its missile arsenal and the regional “Resistance Front.” According to Tasnim, Iran's advantage lies in its ability to produce and procure advanced missiles at a far lower cost than the defensive missiles Israel must use for interception. During the 12-

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78 Tamir Hayman “Operation Rising Lion: Achievements, open questions, and future scenarios.” *INSS Insight*, No. 2007, July 9, 2025. <https://tinyurl.com/2a5zd2xu>

79 “Statements by the [Leader] in a meeting with national athletic champions and medalists in global sports and science olympiads.” *Website of Iran's Supreme Leader*, October 20, 2025. <https://tinyurl.com/uezxphry>

Day War, it took Iran only a few days to push Israel's air-defense munitions toward a critical crisis point. Furthermore, Iranian missiles were able to strike targets in Israel more easily and with greater accuracy during the fighting. Therefore, Iran must preserve at all costs its advantage in the missile domain, which provides it with deterrent power.<sup>80</sup>

In recent months, senior Iranian officials have also stressed the need to rebuild and upgrade Iran's strategic military capabilities—especially missiles and air defenses. Ali Larijani, Secretary of the Supreme National Security Council, discussed in an extensive interview on the Iranian Supreme Leader's official website the improvements required to Iran's military capabilities. He noted that Iran did possess good capabilities that allowed it to impose a ceasefire on its enemies, but its military and security capacities must be strengthened and several operational shortcomings exposed during the war corrected. According to Larijani, Iran is carefully and objectively examining where shortcomings occurred and intends to fix them and strengthen its capabilities, given the assessment that the war is not truly over and Iran must be prepared for a violation of the ceasefire and a renewal of hostilities.

Larijani added that the General Staff of the Armed Forces has assumed specific tasks and is monitoring their implementation, the Defense Ministry is working to supply necessary materials, and all relevant bodies—especially the IRGC and its Aerospace Force—are working to remedy the deficiencies revealed during the war. He cited shortcomings in air defense as a key example and stressed the need to continue strengthening Iran's areas of strength, particularly in missile capabilities. Improvements, he emphasized, will rely primarily on domestic capabilities, though external assistance will also be employed. Addressing intelligence breaches during the fighting, Larijani added

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80 "Iran's two strategic calculations in the struggle against the Zionists." *Tasnim News Agency*, August 10, 2025. <https://tinyurl.com/mu3w647d>

that this domain, too, is receiving focused attention, and Iran is working to enhance technological control over sensitive information.<sup>81</sup>

Military officials have likewise stressed the need to rebuild and enhance Iran's military capacity. Defense Minister Aziz Nasirzadeh stated in a televised interview marking Defense Industry Day that the nature of the battlefield and technological trends require adopting new and updated approaches. He noted that the 12-Day War revealed which offensive and defensive domains Iran must prioritize, and that the defense industry must adapt itself to these evolving trends—especially in light of Western, and particularly U.S., support for Israel. Nasirzadeh said his ministry has already incorporated lessons from the war into future planning and made adjustments to certain national priorities. He emphasized that Iran's priority is not limited to missiles; had the war expanded to additional arenas, Iran possessed capabilities in the maritime and ground domains as well. Regarding challenges in air defense, he noted that no air-defense system in the world is impenetrable, and therefore Iran must not focus exclusively on defense. He added that Iran is concentrating efforts, based on lessons it learnt from the war, on new technologies whose details cannot yet be disclosed. On missile development, the Defense Minister said that Iran has achieved full self-sufficiency in missile production and, following the war, it has reassessed its production methods and now relies on concealed infrastructure.<sup>82</sup>

Armed Forces Chief of Staff Abdolrahim Mousavi said during a visit to the Air Defense Headquarters about a month after the war that Iran must update and reorganize its air-defense systems, adopt new tactics suited to enemy threats, and focus on operational flexibility using domestic scientific

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81 "Iranians Are not the type to surrender." *Website of Iran's Supreme Leader*, August 22, 2025. <https://tinyurl.com/yezcd842>

82 "The recent war changed some of our priorities / We have the ability to surprise the enemy / If the war had lasted 15 days, perhaps." *ISNA (Iranian Students' News Agency)*, August 22, 2025

and technological capabilities.<sup>83</sup> In a letter sent to the Defense Minister on Defense Industry Day, Mousavi wrote that regional and global developments—together with lessons from the 12-Day War—demonstrate that the only way to defend the country from potential threats is to continue the strategy of strengthening defensive power, enhancing deterrence, and improving military systems, equipment, and weapons across land, sea, space, air defense, cyber, and electronic warfare domains, making use of modern knowledge and technology and through sustained cooperation between the armed forces and the Defense Ministry.<sup>84</sup>

In another letter published by Mousavi on Air Defense Day in late August 2025, he stressed that air defense constitutes the front line in defending national sovereignty, and must develop and consolidate its effectiveness and strength to a level commensurate with emerging threats, through the use of advanced technologies, local initiatives, and investment in dedicated, professional human capital. He added that the 12-Day War had demonstrated the need to update systems, strengthen capabilities, and raise the operational readiness of the air-defense network.<sup>85</sup> Army Commander Amir Hatami likewise emphasized the need to draw lessons from the experience of the 12-Day War. At the opening ceremony of a new course at the army's Command and Staff College, Hatami noted that the current era is characterized by hybrid wars that require a fundamentally different type of preparedness than in the past.<sup>86</sup>

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83 "General Mousavi: The courage of the heroes of air defense will be etched in Iran's historical memory." *Tasnim News Agency*, July 18, 2025. <https://tinyurl.com/2vd5w969>

84 "Letter from the Chief of the General Staff to the Minister of Defense." *ISNA (Iranian Students' News Agency)*, August 21, 2025.

85 "General Mousavi: Upgrading air defense systems is essential." *IRIB News*, August 31, 2025. <https://tinyurl.com/yc49v6xb>

86 "Army Commander: The Enemy seeks to instill the idea that the problems, sanctions, and even the eight-year war are the result of the Islamic Republic's existence." *Khabar Online*, October 6, 2025. <https://tinyurl.com/4ast424h>

### Improvements in Military Capacity

In recent months, Iran does indeed appear to be working to improve its military arsenal—foremost among them its missile forces and air defenses—and has even allocated dedicated budgets for this purpose. Barely two months after the war, IRGC Deputy Commander Ali Fadavi declared that the readiness level of the Revolutionary Guards was now far higher than it had been at the start of the fighting.<sup>87</sup> However, doubts persist regarding Iran’s ability to implement the necessary improvements within a reasonable timeframe, particularly in view of the deteriorating economic situation. In September 2025, the spokesperson of the Majles National Security and Foreign Policy Committee announced approval of a draft bill to strengthen the armed forces for a “comprehensive confrontation with the crimes and aggression of the Zionist regime.” The ambitious proposal, which has not yet completed all legislative stages, consists of a single clause and six sub-clauses aimed at reinforcing the defensive capabilities of the armed forces. Under the bill, the Planning and Budget Organization and the Oil Ministry are required to allocate the entirety of the budget for the Iranian year 1404 (corresponding to 2025–2026) to strengthening these capabilities, as well as any remaining funds from the previous year’s budget that have not yet been transferred. The bill further stipulates that the Central Bank will provide the General Staff with up to approximately \$2.2 billion from the National Development Fund—which holds Iran’s foreign-currency reserves from oil and gas sales—or from other foreign-currency sources, to implement emergency defense plans.

In addition, the Planning and Budget Organization is to cooperate with the Central Bank and the Economy Ministry to provide an additional sum of roughly \$2.2 billion for the purchase of defensive equipment from abroad. Another sub-clause enables the Planning and Budget Organization and the Oil Ministry to allocate \$1.5 billion in support of defense needs, through direct transfers to the General Staff. The final sub-clause provides that 30%

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87 “General Fadavi: IRGC readiness is higher than two months ago.” [ISNA](#), August 19, 2025.

of Iran's annual civil-aviation revenues (roughly \$50–70 million per year) will be earmarked for strengthening air-defense systems.<sup>88</sup>

The draft bill reflects Iran's desire to make improvements to its defense capabilities in light of the lessons of the war, yet at the same time it also reveals a persistent adherence to problematic patterns of the past—particularly over-reliance on oil revenues and ad hoc borrowing, poor planning, and the absence of real rethinking on military doctrine. As Nicole Grajewski of the Carnegie Endowment for International Peace has noted, the proposal shows no serious effort to address the structural gaps exposed during the war in air defense, command-and-control systems, research and development, and the defense industry. Nor does the proposed budget provide a meaningful solution for the improvements required in air-defense capabilities. While it places great emphasis on the need to procure foreign systems—based on recognition of the limitations of domestic production—it is highly doubtful that the procurement budget can actually be implemented given the reimposition of sanctions following activation of the snapback mechanism, which severely constrains Iran's ability to acquire advanced military systems, for both offensive and defensive purposes.<sup>89</sup>

In recent months, Iran has clearly stepped up its efforts to rehabilitate and improve its advanced missile forces. This effort reflects the recognition that this arsenal was the only one that proved itself in the war and continues to serve as a central tool of deterrence against Israel and as a means of retaliation. Moreover, despite the significant damage done to missile systems and Israel's success in intercepting most of the missiles launched from Iran (and nearly all of the UAVs), the small proportion that did penetrate Israeli defenses caused casualties (albeit far fewer than pre-war estimates had projected) and

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88 "Approval of a Bill to strengthen the defensive capabilities of the armed forces against the aggression of the Israeli regime." *IRNA*, September 7, 2025. <https://tinyurl.com/ut37456z>

89 Nicole Grajewski, "Iran's Plan for a post-war military revamp: Financing gaps, similar mistakes, and sanctions risks." *Axes and Atoms*, September 15, 2025. <https://tinyurl.com/2v273njz>

unprecedented damage to Israel's home front. It can be assumed that Iran will seek to restore its pre-war production tempo, improve missile precision, and increase the survivability of both launchers and missiles—among other things by moving them into deep underground networks. This rests on an assessment that priority should be given to improving offensive capability—which proved itself to some degree—over strengthening defensive capability, whose effectiveness against IDF capabilities in the event of renewed fighting remains highly doubtful.<sup>90</sup>

In recent months, Iran has conducted at least three missile tests. On July 21, 2025, Iran announced its first missile-related test since the war. According to Iranian media reports, the test utilized the “Qased” satellite launcher and was intended to examine several new technologies under development in Iran's space industry.<sup>91</sup> On August 21, 2025, it was reported that airspace over western Iran had been closed for a cruise-missile test, during which missiles were launched from coastal batteries and warships toward maritime targets in the Gulf of Oman and the northern Indian Ocean.<sup>92</sup> On September 18, 2025, another missile test was carried out in the area of the Imam Khomeini Space Center.<sup>93</sup> A few days later, Majles member Mohsen Zanganeh claimed that Iran had successfully conducted a test launch of an intercontinental missile.<sup>94</sup>

In October 2025, Bakhshayesh Ardestani, a member of the Majles National Security and Foreign Policy Committee, responded to Prime Minister Benjamin Netanyahu's assertion that Iran is seeking to develop intercontinental missiles,

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90 Oded Yaron, “What the Next Israel-Iran Missile War Will Look Like,” *Haaretz*, August 8, 2025. <https://tinyurl.com/373e8977>

91 “Iran successfully conducts a sub-orbital test with the Qased satellite launcher.” *Tabnak*, July 21, 2025. <https://tinyurl.com/9sv7adar>

92 “Iranian navy launches country's first military exercise since war with Israel.” *Times of Israel*, August 21, 2025. <https://tinyurl.com/4fh4t5ke>

93 Jon Gambrell, “Iran has likely carried out an undeclared missile test, satellite photos analyzed by the AP Show.” *Associated Press*, September 25, 2025. <https://tinyurl.com/2ww3xtcr>

94 “MP: The day before yesterday we conducted a successful security test of an intercontinental ballistic missile.” *Entekhab*, September 20, 2025. <https://tinyurl.com/3txvbmp2>

saying that Iran had developed and would continue to upgrade its missile capabilities “to whatever level it deems appropriate.” He added that while Iran’s Leader had previously limited missile range to 2,200 km, this range limitation had been lifted following the war. According to him, Iran’s principal and most important military source of power in the war was its missile program, and it must be strengthened without any restriction.<sup>95</sup>

At the same time, satellite imagery analyzed by the AP revealed that Iran had begun rebuilding missile-production facilities at Parchin and Shahroud that were damaged by Israel during the war. However, damage to industrial planetary mixers—essential for the production of solid-fuel missiles—has, in the assessment of missile experts, delayed a return to pre-war production levels.<sup>96</sup> Iran may seek to purchase such mixers—as well as other components for its missile program—from China, as it has done in the past. In late October 2025, CNN reported, citing European intelligence sources, that since activation of the snapback mechanism in late September 2025, several shipments of sodium perchlorate—a key component in the production of solid fuel used in Iran’s surface-to-surface missiles—had arrived from China at Iran’s Bandar Abbas port. According to this report, the shipments included some 2,000 tons of chemicals purchased by Iran from Chinese suppliers after the 12-Day War.<sup>97</sup>

In the field of air defense as well, Iran appears to be making an effort to rehabilitate the arsenal that failed to cope with Israeli air superiority. Majles member and former senior IRGC officer Mohammad Esmail Kowsari, in an interview with the Tabnak news site, referred to the possibility that Russia might supply Iran with advanced S-400 air-defense systems. He said that, based on experience accumulated during the war, Iran had accurately identified its

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95 “Member of the National Security Committee: The leader has lifted restrictions on missile range.” *Asr-e Iran*, October 8, 2025. <https://tinyurl.com/345c5fm2>

96 Jon Gambrell, “Fearing another war with Israel, Iran begins rebuilding missile sites, but key component is missing.” *Associated Press*, September 24, 2025. <https://tinyurl.com/jvaad2h3>

97 Melissa Bell & Gianluca Mezzofiore, “Western intelligence says Iran is rearming despite UN Sanctions, with China’s help.” *CNN*, October 29, 2025. <https://tinyurl.com/4dy5b499>



vulnerabilities and taken effective steps to address them. Some of these steps, he added, were already in the process of implementation, though there was no need to disclose their details publicly.<sup>98</sup> Iran may seek assistance from Russia (S-400 systems) and China (HQ-9 systems) to rebuild its air-defense network, though the effectiveness of the Russian and Chinese systems remains in doubt. Moreover, Russia still needs its air-defense systems for the continuation of the war in Ukraine and is unable to finance transactions on credit.

Past experience points to repeated delays and partial delivery of military equipment from Russia to Iran. The supply of Chinese weapons systems and air-defense platforms to Iran is also uncertain at this stage, partly due to China's reluctance to expose its systems to real-world testing against American and Israeli military technologies in the event of renewed fighting.<sup>99</sup> Furthermore, although China and Russia oppose the reimposition of sanctions on Iran, there is no certainty that either of them will provide advanced systems under an arms embargo regime—though this possibility cannot be ruled out over the longer term. Under these conditions, North Korea could emerge as a potential partner, particularly in fields such as underground construction, missile-base infrastructure, and survivability measures, in which it has extensive technical experience.

It should be noted that the strategic cooperation agreement signed between the presidents of Russia and Iran in January 2025 does not include any clause obligating the two states to provide military assistance to one another should either be attacked. However, Russia's failure to provide assistance to Iran during the 12-Day War aroused growing criticism in Iran and exacerbated traditional Iranian mistrust toward Moscow—especially among circles associated with the pragmatic and reformist camps. These circles have for years warned against

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98 "Has the strategic S-400 system entered Iranian territory? / Covering air-defense vulnerabilities." *Tabnak*, August 17, 2025. <https://tinyurl.com/mub6a4st>

99 Danny Citrinowicz & Raz Zimmt, "Iran's relations with China and Russia following the Israel–Iran War." *INSS Insight* No. 2031, August 31, 2025. <https://tinyurl.com/d2kd3tmz>

deepening dependence on Russia, which, they argue, may sacrifice Iran's national interests on the altar of Russia's priorities.<sup>100</sup> Thus, for example, the Khabar Online news site criticized the prolonged delay in delivery of Russian Sukhoi-35 aircraft to Iran. The site assessed that the delay did not stem from technical or economic issues, but from Russia's preference for its relations with Israel, the United States, and the Gulf states over its commitments to Iran. The delay in supplying the aircraft—which could have significantly affected the outcome of the confrontation with Israel—proved, Khabar Online argued, that the alliance between the two countries is one-sided: Iran supplies Russia with critical UAVs, and in return receives empty promises.<sup>101</sup>

The reformist daily *Shargh* argued that Russia's conduct—its failure to stand by its most important partner in its moment of greatest need and its unwillingness to impose any solution on the parties—raises doubts about the nature of the alliance between the two states. In a commentary entitled “Russia: Observer or Ally?” the paper wrote that the Iranian–Russian partnership, which reached its peak with the signing of the strategic cooperation agreement in early 2025, had yielded no tangible achievements for Tehran. While the United States actively joined the war, Russia's support remained limited to political declarations. According to the daily, Russia's refusal to supply advanced aircraft or advanced air-defense systems to Iran even after the Israeli strike in late October 2024 once again proves that the partnership is based on fluctuating interests rather than any real commitment.<sup>102</sup>

Although it is unlikely that Iran will alter its strategic approach to Russia in the foreseeable future, the war with Israel has reignited doubts in Tehran about

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100 Raz Zimmt, “Iranian suspicion toward Moscow in light of a twitter post by the Russian embassy in Tehran.” Alliance Center for Iranian Studies, *Iranix*, Issue 2, February 28, 2022. <https://tinyurl.com/4mwwy59m>

101 “Why aren't the Russians delivering the Sukhoi-35 aircraft to Iran? / Has Iran unwittingly become a bargaining chip for Russia? *Khabar Online*, June 30, 2025. <https://tinyurl.com/3sew6jwr>

102 “Russia: Observer or Ally?” *Shargh*, June 29, 2025. <https://tinyurl.com/3bdnxuun>

Russia's strategic value for Iran. Moreover, Russia's decreasing dependence on Iranian UAVs—due to its own expanding domestic drone production—reduces Moscow's incentive to assist Iran.<sup>103</sup> Under these conditions, Iran may attempt to operate through other channels. According to a statement by Ukraine's Foreign Intelligence Service, reported in the Ukrainian media in August 2025, Iran sought Belarusian assistance in rebuilding its defense capabilities. The report was published shortly after a meeting in Minsk between Iranian President Pezeshkian and his Belarusian counterpart Alexander Lukashenko. According to Ukrainian intelligence, the Iranian president requested Belarusian assistance in repairing Iran's air-defense systems and electronic-warfare capabilities, partly because, unlike Russia, Belarus faces fewer restrictions under military-technology sanctions and could therefore serve as a channel for rehabilitating Iran's capabilities.<sup>104</sup>

In parallel, Iran is working to improve its civil warning systems. In early August 2025, Tehran's municipality began installing loudspeakers and public announcement and siren systems at various points throughout the city to provide emergency alerts to civilians.<sup>105</sup> Tehran City Council member Mehdi Babaei said that during the war, the Communications Ministry was forced to restrict internet access, and may also need to block mobile-phone service temporarily during wartime. Therefore, the public cannot rely solely on mobile phones for emergency notifications; public announcement systems must be installed to deliver instructions and activate sirens. Babaei emphasized the

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103 "Tensions rise between Iran and Russia; Moscow's new drone factory reduces reliance on Tehran." *All Arab News*, August 10, 2025. <https://tinyurl.com/yvtp7vsh>.

104 "Ukrainian intelligence says Iran seeks Belarus's help to fix defenses damaged in war with Israel." *Times of Israel*, August 23, 2025. <https://tinyurl.com/m6dm4xk3>

105 "Loudspeakers for emergency warnings and red-alert sirens are being installed across Tehran." *Asr-e Iran*, August 3, 2025. <https://tinyurl.com/59nfe38h>

need to designate an official body responsible for the ongoing maintenance of these systems.<sup>106</sup>

Finally, in recent months several unverified reports have circulated regarding an Iranian intention to rehabilitate its aging air force with Russian or Chinese assistance. In October 2025, it was reported that Iran had purchased Su-35 fighter jets from Russia in a deal valued at six billion euros, with delivery expected to be completed by 2028.<sup>107</sup> At the same time, Majles member Abolfazl Zohrevand claimed that Iran had recently received Russian MiG-29 fighter aircraft. According to him, the aircraft were stationed at a base in Shiraz and serve as a short-term solution until the gradual arrival of the more advanced Su-35 jets.<sup>108</sup> The reliability and currency of the information underlying these reports remains unclear. In any case, even if Iran acquires new fighter jets in the coming years, such procurement is unlikely to pose any meaningful threat to advanced air forces such as the Israeli Air Force.

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106 “Installation of loudspeakers in the streets of Tehran.” *Fararu*, July 26, 2025. <https://tinyurl.com/5wtbyvch>

107 Dudi Kogan, “Report: Leaked documents reveal fighter jet deal between Russia and Iran.” *Israel Hayom*, June 10, 2025. <https://tinyurl.com/mrx6adtz>

108 “Zohrevand, member of the Majles National Security Committee: Russian MiG-29 fighter jets have arrived in Iran and are in Shiraz.” *Entekhab*, September 23, 2025. <https://tinyurl.com/hh6hhe7k>

## CHAPTER 4

# IRAN IN THE REGIONAL ARENA AFTER THE WAR

### **The War and the Collapse of the Proxy Doctrine**

Although the limits of Iran's power in activating the regional network it had woven over years were already evident in the months preceding the 12-Day War—above all since Hezbollah's defeat by Israel and the collapse of the Assad regime in Syria—the war further underscored the breakdown of the proxy doctrine. The concept of “forward defense,” designed to neutralize threats to Iran's national security as far from its borders as possible through the use of proxies, ultimately did not prevent Israel and the United States from striking Iran directly.

The proxy network is a basic pillar of Iran's security doctrine and one of its principal instruments for deterring adversaries, expanding its strategic depth, and projecting influence and power beyond its borders. From the perspective of Iran's rulers, this network enabled the Islamic Republic to advance its strategic interests in the region at relatively low cost, while trying to avoid, as far as possible, a direct confrontation with its main rivals. By relying on sub-state organizations, Iran succeeded in establishing important footholds of influence in the Arab arena—even though regional actors that cooperate with it often have their own interests and calculations that do not necessarily align with those of Tehran.

Over the past two decades, Iran has invested growing efforts in expanding its regional influence. This trend reflects an entrenched perception at the top of Iran's political and security establishment that assigns increasing importance to extending Iranian activity and influence far beyond its political and geographic borders as a means of better coping with external threats.

One of the central goals in constructing the “Axis of Resistance” was to deter Israel from attacking Iran's nuclear facilities and to provide an immediate

response capability should such an attack occur. In line with this logic, Iran could also have expected support from its proxies during the war. But in practice, they did almost nothing to assist it on the “day of reckoning,” as they were supposed to according to Iran’s security concept.

Israel’s opening of a military campaign against Iran caught the pro-Iranian axis actors in a deep crisis after nearly two years of fighting against Israel, during which many of their leaders and thousands of operatives had been killed, and their military capabilities had been severely damaged. These military setbacks, compounded by fear of harsh retaliation from Israel or the United States, led members of the “Axis of Resistance” to refrain almost entirely from offensive action. Instead, they confined themselves to declarations of support for Iran and condemnations of the Israeli and American strikes.<sup>109</sup>

Hezbollah—intended to play a central role in the “Axis of Resistance” “ring of fire” around Israel and to assist Iran once it came under Israeli attack—did not join the war and limited itself to declarative support for Tehran. After the defeat inflicted on it by Israel, the organization was unable to fulfill its designated role, even if Tehran pressed it to join the fighting and open another front against Israel. Since the ceasefire in its war with Israel at the end of November 2024, Hezbollah has faced a series of challenges, foremost among them the loss of weapon and money-smuggling routes from Iran following the fall of the Assad regime, the Lebanese government’s ban on flights from Iran, and efforts by Lebanon’s leadership to assert a state monopoly on the use of force and dismantle militias—including Hezbollah—of their weapons. Throughout the war, Hezbollah expressed support for Iran and echoed Iranian messages accusing Israel of aggression backed by the United States. Yet the

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109 “The “Resistance Axis’ and the Israel-Iran War.” *Meir Amit Intelligence and Terrorism Information Center*, July 6, 2025. <https://tinyurl.com/3jswzddr>

organization's leaders preferred to justify their inaction by claiming that Iran was strong enough and did not require assistance.<sup>110</sup>

As a result, the war deepened the doubts already present in Tehran regarding the effectiveness of the proxy doctrine. The war in the Gaza Strip had provided Iran with a first major opportunity to implement the concept of “unity of the fronts” on a larger scale than in the past, by activating multiple arenas simultaneously and in a coordinated manner against Israel and the United States, without itself paying a direct price. However, the war also exposed the limits of Iran's ability to harness the full capabilities available to the pro-Iranian axis.

Tehran failed to achieve, through its proxy network, its two principal objectives: stopping the fighting in Gaza in order to minimize the cost to Hamas, and exerting pressure on the United States to curb its unconditional support for Israel and force it to end the war before achieving its goals. Worst of all, the war in the Gaza Strip posed, for the first time, a genuine threat to Hamas' very survival—Hamas being an important, though not central, component of the pro-Iranian axis—and severely damaged Hezbollah, which is a key strategic asset for Iran in the region. The targeted elimination of Hezbollah's leadership, starting with Hassan Nasrallah, together with the severe blow to its military capabilities, posed a real threat to the most important regional project Iran had nurtured for decades and significantly eroded its ability to deter Israel and respond in the event of strikes on Iranian nuclear facilities.

Moreover, tensions emerged during the war between Iran and some of its proxies due to gaps between Tehran's interests and those of the organizations it supports. These gaps stemmed in part from changes in Iran's proxy-management doctrine in recent years, particularly following the killing of Quds Force commander Qassem Soleimani in January 2020, which forced Iran to manage its proxy network in a more decentralized manner than in the

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110 Orna Mizrahi & Moran Levanony, “After the Israel–Iran War: Hezbollah's decline and Israel's opportunity.” *INSS Insight*, No. 2001, July 1, 2025. <https://tinyurl.com/mrx6vz8k>

past. Iran continued to maintain a high degree of influence over this network, but no longer necessarily exercised full and continuous control over each of its components.

After Iran's missile and UAV attack on Israel in April 2024, intelligence sources assessed that Iran was disappointed with Hezbollah's response that night. Hezbollah did fire several salvos of dozens of rockets toward IDF bases on the Golan Heights during the Iranian attack, but this response did not go beyond the "rules of the game" that have prevailed between the organization and Israel along the northern border since the Gaza war began.<sup>111</sup> The killing of three American soldiers in Jordan in an attack by an Iraqi Shiite militia in late January 2024, along with the intensifying activity of the Houthi movement in Yemen—supported by Iran—against shipping routes in the Red Sea and Gulf of Aden, also risked dragging Iran into an undesired military confrontation with the United States.<sup>112</sup>

Thus, Iran's use of proxies and its support for them—designed to reduce the risk that it would be drawn into a direct military confrontation—ultimately led it into a direct military clash with Israel. After the Israeli strike in Iran on October 26, 2024, Iranian journalist Amir-Hossein Mossala gave expression to this failure. In a post on his X account, he wrote that the "Axis of Resistance," which was developed in Syria and Iraq at Iran's expense in order to secure strategic depth for Iran and push the danger of war away from its borders, had resulted in Israeli fighter jets attacking Iran via Iraq and Syria and in the deaths of four Iranian soldiers.<sup>113</sup> Although Iranian leaders refrained from publicly criticizing their allies, commentaries published in the Iranian press reflected a growing sense of disappointment. Soon after the 12-Day War,

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111 Roi Kais, "Nasrallah's identity dilemma: Hezbollah attacked, the Iranians expected more." *KAN 11*, April 17, 2024. <https://tinyurl.com/58yu53x3>

112 Itamar Eichner & Lior Ben-Ari, "The Red Sea attack lasted 5 hours, U.S. threatens response: 'Iran is enabling this.'" *Ynet*, December 4, 2023. <https://tinyurl.com/wrns9zu8>

113 The X account of Amir-Hossein Motzalla, October 28, 2025. <https://tinyurl.com/mts46a2k>



expressions of criticism appeared in the Iranian media, alongside frustration over the reluctance of Iran's regional proxies to open additional fronts against Israel during the campaign.

Commentary published on *Asr-e Iran* argued that Iran's proxies did not provide it with any real support during the war: Hezbollah remained silent because of the blows it had suffered over the past year; the Houthis in Yemen were content mainly with verbal threats and did not take meaningful action, even though they fired several missiles toward the port of Eilat; and the pro-Iranian militias in Iraq adopted a cautious political stance and even refrained from issuing an official statement of support for Iran—underlining Baghdad's deep security dependence on the West. According to the article, the conduct of members of the Axis, along with the silence of Iran's neighbors during the war, reflects the erosion of Iran's strategic depth and its geopolitical isolation—a process that could evolve into a genuine strategic threat.<sup>114</sup>

By contrast, commentary published on the radical-leaning *Mashregh News* website emphasized the importance of “resistance” in light of the lessons of the 12-Day War. In discussing the role of the pro-Iranian axis in the war, the article argued that throughout the fighting, pro-Iranian Shiite militias in Iraq remained on high alert, waiting for the order to act against American bases in the country. In Yemen, the Houthis were also fully prepared, increased their monitoring of American naval movements in the Red Sea, and continued to fire missiles at Israel in order to complicate Israel's air-defense efforts. In Lebanon, Hezbollah adopted a policy of ambiguity and prepared several scenarios for action in the event of increased American involvement in the war, escalation into a regional conflict, or a significant weakening of Iran. According to the website, Iran's allies in the region proposed several support plans to Tehran and waited for its approval, but Iran did not request any action beyond limited attacks because it preferred to keep the “cards” at its

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114 “Three systems in a 12-day crisis / Part One: Alone on the battlefield.” *Asr-e Iran*, July 2, 2025. <https://tinyurl.com/mp822ncc>

disposal for a scenario of regional war or severe damage to its own capabilities. The article concluded that the central lesson from the war is the need to preserve the resistance. Rehabilitating the “Resistance Front” in line with the doctrine of former Quds Force commander Qassem Soleimani—based on the multilayered defense of Iran—is, according to this analysis, one of the key components of any future campaign.<sup>115</sup>

In any case, public discourse in Tehran indicates that Iran does not intend to abandon its partners in favor of a new regional strategy. Even amid dramatic regional developments, circles associated with Iran’s conservative–radical establishment have continued to stress that Israel’s operational achievements do not fundamentally alter the balance of power in its favor. Moreover, there is as yet no indication that these circles recognize the need for strategic rethinking, particularly with regard to the use of proxies. In addition, Iranian officials—chief among them the Supreme Leader, Khamenei—have continued to express confidence in Iran’s and the Axis’ ability to cope successfully with Israel. For example, on October 23, 2024, Khamenei declared that the Zionists had believed they could easily eliminate the resistance groups, yet they were still fighting Hamas, Islamic Jihad, Hezbollah, and other organizations, despite having killed more than 50,000 innocent civilians and several leaders of the “Resistance Front,” and despite the United States’ continued support for Israel.<sup>116</sup>

These declarations continued after the 12-Day War as well. In a meeting with the Houthi ambassador in Tehran in August 2025, the Supreme Leader’s adviser on international affairs, Ali Akbar Velayati, praised the “resistance of the Yemeni people” and emphasized the importance of continued strategic cooperation within the “Resistance Front” and the need to improve coordination among its components in order to confront “the enemies’ plots” and preserve

115 “It is important to examine the role of the Axis of Resistance in the recent 12-day war.” *Mashregh News*, June 26, 2025. <https://tinyurl.com/2ctp86fu>

116 “Supreme Leader: Victory belongs to the Axis of Resistance.” *Asr-e Iran*, October 23, 2025. <https://tinyurl.com/42nm2xd7>

unity.<sup>117</sup> A statement by the IRGC marking the anniversary of the deaths of Hassan Nasrallah and senior Hezbollah leaders in the Israeli strike in Beirut, asserted that the resistance is not an institution that can be dismantled through political or security processes, but rather an identity, an idea, and a culture rooted among the peoples of the region. According to the IRGC, the plans of the Zionists and Americans to weaken or destroy the resistance have repeatedly failed and will once again bring only humiliation and disgrace upon their enemies. The statement stressed that the resistance has not only not been weakened, it is actually growing stronger and becoming an even more prominent regional actor. The IRGC pledged to continue supporting the “Axis of Resistance” and committed to pursuing this path “until the elimination of the occupation and the liberation of Jerusalem” as a divine, national, and irreversible mission.<sup>118</sup> These declarations—similar to those heard many times in the past—can be read as empty rhetoric or bombast intended to conceal Iran’s weakness. Yet they can also be interpreted as an authentic reflection of a mindset within Iran’s leadership that continues to assess that the balance of power still tilts in its favor.

### **Iran’s Continued Commitment to Its Allies**

The mounting pressure on Iran’s proxies—especially in Lebanon and Iraq—alongside growing calls to disarm the Shiite militias, has not escaped the regime’s notice. The collapse of the Assad regime has significantly reduced Iran’s ability to rebuild its proxy network, particularly in the military sphere. Nonetheless, it is clear that Iran does not intend to abandon its allies. Moreover, Israeli strikes across the region—including the attack on Iran itself and the failed strike in Qatar—are presented in Tehran as proof that abandoning the

117 “Velayati’s meeting with the Ansarallah representative in Yemen; emphasis on unity of the Resistance Front.” *Tasnim*, August 14, 2025. <https://tinyurl.com/yc3tnuzh>

118 “IRGC statement on the anniversary of the [elimination] of Resistance leaders: The IRGC views support and assistance to the Resistance in the region as a divine, national, and unstoppable mission.” *Khabar Online*, September 27, 2025. <https://tinyurl.com/2892n4su>

“resistance” would pave the way for the realization of the “Greater Israel” project and the establishment of Israeli regional hegemony.

Commentary published by Tasnim News Agency in August 2025 argued that the regional “Resistance Front” still provides Iran with a trump card against Israel and the United States. According to Tasnim, the front’s main advantage lies in the significant ground forces at its disposal. As an example, the agency cited the establishment of the Islamic Resistance in Syria (Awliya al-Ba’s), a new militia supported by Iran that emerged in January 2025 and claimed responsibility for firing a rocket at Israel in June 2025.<sup>119</sup>

In light of the growing pressure on Hezbollah to disarm, Iranian voices have stressed that the resistance is the guarantor of Lebanon’s security. In September 2025, the conservative Iranian news agency SNN sharply criticized efforts to strip Hezbollah of its weapons. A commentary it published argued that the Lebanese government’s plan to concentrate weapons solely in the hands of the Lebanese army—while Israel continues its strikes in Lebanon—is not a means of strengthening Lebanese sovereignty but rather a “forced project” imposed by the United States and its allies to dismantle Hezbollah and weaken the “Axis of Resistance,” thereby “inviting the Israeli monster” to reoccupy Lebanon and drag it into another civil war. The article stressed that political logic and historical experience show that the resistance has been the only actor capable of liberating southern Lebanon from Israeli occupation and preventing the realization of the “Greater Israel” project. Therefore, disarming Hezbollah before the state possesses real defensive capabilities could open the door to another Israeli invasion.

Moreover, Hezbollah’s weapons are not only a guarantee of Lebanon’s security but also an integral part of the regional deterrence equation. Experience has shown that when Hezbollah grows weaker, Israel becomes bolder in its aggression in other arenas as well—including Syria, the Gaza Strip, and

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119 “Iran’s two strategic calculations in the struggle with the Zionists.” *Tasnim*, August 10, 2025. <https://tinyurl.com/mu3w647d>

Yemen. Disarming Hezbollah would abandon the Lebanese public to foreign aggression and, contrary to the government's claims, would not ensure the country's reconstruction but instead deepen emigration, instability, and despair.<sup>120</sup>

Iranian objections to disarming militias have also been voiced with respect to Iraq. The Supreme Leader's representative in Iraq, Ayatollah Sayyid Mojtaba Hosseini, declared that the American demand to disarm the Shiite militias in Iraq is an unattainable wish, and that the Iraqi people will never accept such a move. He claimed that everyone knows the United States seeks to bring to Iraq the same disaster it brought upon Syria, but that there is no justification for doing so. According to Hosseini, members of the Popular Mobilization Forces—the umbrella framework of the pro-Iranian militias—are loyal and well-trained fighters, equipped with sufficient military means and operating as part of the front of the Islamic Republic and the Islamic resistance.<sup>121</sup>

Support for continued backing of the proxies has not been limited to the conservative–hardline camp. In an interview with *Shargh* in August 2025, the reformist journalist Mashallah Shams al-Vaezin argued that Iran must not accept the American and Israeli demand to disarm the resistance and establish a new order based on its elimination—not only as a military force but also as a political movement. He emphasized the importance of preserving the resistance and presented the liberation of southern Lebanon from Israeli occupation as proof of its effectiveness. In his view, there is no way to confront an aggressive, racist occupier such as Israel except through resistance. Shams al-Vaezin added that the real purpose of the demand to disarm armed groups in Lebanon, Iraq, Yemen, and Gaza is to establish a new

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120 “Disarmament of Hezbollah: a prelude to suicide and to Lebanon’s re-occupation.” *SNN*, September 6, 2025. <https://tinyurl.com/yy73wj9>

121 “Representative of the Leader in Iraq: Members of the Popular Mobilization Forces are loyal to the Leader and stand on the frontlines of the Islamic Republic.” *Asr-e Iran*, August 24, 2025. <https://tinyurl.com/yas33stk>

regional order that would eliminate all states and groups opposing Israel's aggression in the region. The first step in creating such an order, he argued, is to strip these groups of their weapons, followed by their political and social liquidation, and ultimately the destruction of the ideology of resistance itself. He noted that the regional order in the Middle East—as of the 12-Day War and considering subsequent developments—still rests on the “Axis of Resistance.” Moreover, in his view, the war proved the end of the “invincible Israel” myth. The resistance is spreading across Arab and Islamic states—from Indonesia to Central Africa, from Central Asia to the Eastern Mediterranean—and the power of the “Axis of Resistance” is greater than that of rival blocs, whether the Turkey-led axis or the “Arab–Israeli” axis led by the United States, Israel, and the Abraham Accords states.<sup>122</sup>

Even so, from Iran's perspective, certain adjustments can be made within the existing framework while seeking ways to offset the gaps in its deterrent capacity. Such measures may include accelerating efforts to establish terrorist infrastructure in the West Bank (as a possible substitute for the Gaza Strip); stepping up terrorist activity inside Israel; attempting to offset the blow to Hezbollah's military power through at least partial restoration of its capabilities; continuing Iranian support for Shiite militias in Iraq; and expanding assistance to the Houthis in Yemen. The continued transfer of funds to Hezbollah and Hamas, as well as assistance to the Houthis in Yemen and Shiite militias in Iraq, indicates that Iran is determined to preserve the axis by finding alternative channels of support and exploiting opportunities—such as the violent events that occurred in southern Syria in July 2025.<sup>123</sup> At the same time, reports have suggested that Iran has been training loyalists of the Assad regime at camps in Iraq, who may attempt to re-establish a pro-Iranian presence in

122 “A new security engineering in the Middle East.” *Shargh*, August 13, 2025. <https://tinyurl.com/yc35u5mc>

123 Carmit Valensi, “The bloody clash in Sweida: Strategic dilemmas for Israel.” *INSS Insight*, No. 2016, July 22, 2025. <https://tinyurl.com/vh3f6f42>

Syria.<sup>124</sup> In July 2025, Israel captured members of a terror cell linked to Iran in two separate operations in southern Syria.<sup>125</sup>

In parallel, it has been reported that Iran is also continuing its efforts to transfer weapons to its proxies in the region. In July 2025, *The Wall Street Journal* reported that Iran had begun using small vehicles to smuggle weapons to Hezbollah via Syrian territory, having previously relied on large trucks. According to the report, Hezbollah succeeded in smuggling Kornet anti-tank missiles and advanced weapons into Lebanon by this method.<sup>126</sup> In September 2025, the pan-Arab daily *Asharq Al-Awsat* reported that Iran had asked a senior Iraqi official to grant it extraordinary allowances at the al-Qaim border crossing between Iraq and Syria in order to transfer cash shipments to Hezbollah through Syrian territory. The paper further reported that security officials in Syria and Lebanon had monitored growing Iranian efforts to deliver assistance to Hezbollah against the backdrop of mounting pressure on the organization to disarm. Senior figures in Iraq's Shiite "Coordination Framework" stated that Iran had instructed militia leaders to seek new ways to rebuild Hezbollah's capabilities.<sup>127</sup>

In October 2025, Israel's Shin Bet security service and the IDF thwarted a major smuggling operation of advanced weapons originating in Iran and destined for terrorist operatives in the West Bank. A joint statement by the security agencies said the intercepted shipment contained "game-changing" weapons, including anti-tank rockets, Claymore-type mines, drones capable of dropping explosives, hand grenades, machine guns, and pistols. The

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124 Hudhaifa Ebrahim, "Tehran seeks comeback in Syria through Iraqi training camps." *Ynet Global*, April 29, 2025. <https://tinyurl.com/ynetpvj9>

125 Emanuel Fabian, "For the second time in days, IDF says troops arrested a terror cell in Syria working for Iran." *Times of Israel*, July 7, 2025. <https://tinyurl.com/nyfv6r5x>

126 Benoit Faucon & Adam Chamseddin, "Iran is moving to rearm its militia allies." *Wall Street Journal*, July 17, 2025. <https://tinyurl.com/7nza6uyw>

127 "Tehran seeks new channels to funnel money to Hezbollah." *Asharq Al-Awsat*, September 9, 2025. <https://tinyurl.com/4hmu97vd>

statement added that the cache of weapons had been sent to West Bank operatives by the IRGC Special Operations Directorate and the Quds Force's special operations unit.<sup>128</sup>

In parallel, Iran continues to transfer weapons to the Houthis in Yemen. In early August 2025, Yemen's National Resistance Forces (NRF)—operating in southern Yemen with Western backing—seized a shipment of weapons en route to the Houthis. According to the NRF statement, the shipment, which was destined for the port of al-Hudaydah but diverted to the government-held port of Aden, contained UAVs, jet propulsion systems, wireless devices, and advanced control components.<sup>129</sup> In October 2025, an Iranian vessel carrying weapons—including Kornet missiles and spare parts for UAVs—was intercepted near the Bab al-Mandeb Strait while sailing from Bandar Abbas toward Houthi-controlled areas.<sup>130</sup>

One way Iran is attempting to cope with the mounting pressure on its partners in the “Resistance Front” is by expanding its engagement with central governments—especially in Lebanon—while repeatedly stressing that it does not seek to interfere in Arab states' internal affairs. During a visit to Lebanon in August 2025, Supreme National Security Council Secretary Ali Larijani officially acknowledged the constraints that Hezbollah faces and stressed the need to work also with the Lebanese state authorities, while emphasizing that Iran does not intend to meddle in Lebanon's domestic politics.

In his meeting with Lebanese President Joseph Aoun, Larijani said that Iran seeks friendly relations with all Lebanese, not just with a particular sect, and that it supports the Lebanese government and the decisions made by the country's legitimate institutions. He added that Tehran is prepared to offer

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128 Yoav Zitun, “29 mines, 15 rockets, 60 pistols and rifles: Iranian weapons shipment to the West Bank intercepted | Footage.” *Ynet*, October 8, 2025. <https://tinyurl.com/mujxdbm5>

129 “Yemen forces interdict illegal weapons systems and equipment bound for Iran-backed Houthis.” *Yemen Online*, August 16, 2025. <https://tinyurl.com/ycyphfj4>

130 “Weapons shipment seized near Bab al-Mandab strait, en route to the terrorist Houthi militia.” *Yemen Vibe*, October 22, 2025. <https://tinyurl.com/4tvd62jt>



assistance to Lebanon if its government requests it.<sup>131</sup> At a press conference in Beirut, Larijani emphasized that Iran supports regional states being strong and independent, and that it will respect any decision taken by the Lebanese government in coordination and consultation with Hezbollah. He stressed that the resistance constitutes a national asset of Lebanon and of all Islamic countries, and that Lebanon's enemy is Israel, which has attacked it. At the same time, he reiterated that Iran has no intention of interfering in other states' internal affairs, including Lebanon's.<sup>132</sup> On a subsequent visit to Lebanon in September 2025, Larijani declared that Iran does not give orders to anyone, and that Hezbollah's Secretary-General Naim Qassem himself decides what serves the interests of his people. He added that Iran seeks to encourage senior Lebanese officials and the various political currents to work together in consensus, and emphasized that Lebanon's internal affairs are for the Lebanese alone to decide. Larijani also addressed claims that Iran is supplying Hezbollah with weapons, responding that Hezbollah is strong enough and does not need weapons from other states. He similarly rejected claims by U.S. presidential envoy Tom Barrack regarding alleged multi-million-dollar Iranian financial assistance to Hezbollah.<sup>133</sup>

Larijani reiterated this updated Iranian approach in an interview with the Supreme Leader's official website, where he outlined Iran's revised concept regarding continued support for its proxies, while stressing the independence of central governments in the region and the need to strengthen them. Larijani argued that it is incorrect to claim that the "Resistance Front" has weakened, insisting that it is alive, breathing, evolving, and even growing stronger as pressure on it increases. He added that it is always appropriate

131 "Details of Larijani's meeting with Aoun, according to Lebanese media reports." *Tasnim*, August 13, 2025. <https://tinyurl.com/bdd6yjd2>

132 "Larijani: Iran's policy is to make the region's states independent and strong." *Tasnim*, August 13, 2025. <https://tinyurl.com/5wff8m3b>

133 "Larijani: We are prepared for all scenarios / The Americans need not consider themselves guardians of the Lebanese people" *ISNA*, September 27, 2025.

to adapt decisions to changing circumstances, but that this does not in any way undermine the Islamic Republic's support for the resistance, which it continues to regard as an authentic movement and a strategic asset. Just as Iran's enemies use all the capabilities at their disposal, he argued, so too must Iran make use of its own capabilities. He emphasized that Hezbollah and the other resistance forces do not constitute a burden on Iran. They need its assistance just as Iran needs theirs for the sake of its national security. At the same time, he stressed that members of the axis must solve their problems themselves within a framework of national dialogue, and that they are not subordinate to Iran, which respects their decisions and their judgment. Moreover, he underscored that the region's central governments, including those of Lebanon and Iraq, also need to be strong, and that Iran believes in the existence of independent governments in the region alongside its support for the resistance.<sup>134</sup>

Iranian Foreign Minister Araghchi has likewise expressed the view that the mere fact that Iran takes a position on developments in Lebanon or on the resistance does not mean that it is interfering in Lebanon's internal affairs. In an interview with Iranian television, the minister stressed that Hezbollah is a completely independent organization that makes its own decisions, and that Lebanon's internal issues should be resolved through dialogue among the country's various groups and sects. At the same time, he argued that regional peace would be less stable without the weapons of the resistance, and that if it were to be disarmed, no other actor would be able to curb Israel's hegemonic ambitions in the region, as has been evident in Syria. Araghchi added that Iran has warned Lebanon about this danger, but that

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134 "The Iranians are not the sort to 'surrender.'" Website of Iran's Supreme Leader, August 22, 2025. <https://tinyurl.com/yezcd842>

the decision on how to act lies solely with the Lebanese themselves—and especially with Hezbollah.<sup>135</sup>

Against the backdrop of the increasing constraints faced by its proxies in the region, Tehran has in some cases shown a willingness to encourage its allies to refrain from actions that could lead to escalation—an escalation it does not currently seek. This is particularly evident in Iran’s policy toward Iraq, where the pro-Iranian Shiite militias are under mounting pressure. During visits to Iraq in the summer of 2025, Quds Force commander Esmail Qaani conveyed a clear message from Tehran to the Shiite militias opposing unilateral actions on their part. According to one report, Qaani emphasized Iran’s support for the Iraqi government and its efforts to assert its authority, and warned of the possibility of Israeli strikes against militia headquarters. He also expressed Tehran’s displeasure at the continued activity of certain groups without coordination with the government in Baghdad. According to a senior figure in the Shiite “Coordination Framework,” Qaani’s visit indicates a certain shift in Iran’s approach to the Shiite militias in Iraq, characterized by a move from unconditional support to limited and calculated guidance. This change, the official argued, stems from mounting economic and international pressure on Tehran and its efforts to improve its bargaining position with the West. At the same time, he added, Iran is working to preserve the unity of the Coordination Framework and to prevent disagreements among the Iraqi Shiite factions from undermining the cohesion of the Shiite camp—particularly in the run-up to Iraq’s parliamentary elections in November 2025.<sup>136</sup>

A further indication of Iran’s readiness to adjust its policy toward its proxies can be seen in a report by Amwaj Media, which cited Iraqi political sources as saying that the IRGC is examining, together with several major pro-Iranian

135 “Araghchi: The Zionists are angry at our resistance to sanctions.” *Asr-e Iran*, August 14, 2025. <https://tinyurl.com/34ca9pjn>

136 “Iraqi sources reveal to ‘Al-Ain Al-Ikhbariya’ details of Qaani’s ‘secret’ visit and its link to the elections.” *Al-Ain*, July 30, 2025. <https://tinyurl.com/53pkfxtt>

Shiite militias, the possibility of focusing their efforts on the Iraqi political arena. This comes in response to growing pressure on the militias from the central government in Baghdad and from the United States. At the same time, according to this report, Iran is working to encourage and support smaller Iraqi militias that are not part of the Popular Mobilization Forces, so that they can continue military activity.<sup>137</sup>

### **Iran and the Arab States After the War**

In parallel to its ongoing activity vis-à-vis the “Resistance Front,” Iran has been making a sustained effort to continue improving its relations with its Arab neighbors. The trend of détente between Iran and Sunni Arab states—primarily the Gulf states—is closely linked to their fears of Iran, especially since the September 2019 attack on Saudi oil facilities attributed to Iran, which highlighted Iran’s military advantage; to growing doubts about the reliability and security commitment of the United States toward its regional partners; and to the Gulf states’ desire to refocus on domestic issues and on long-term reconstruction and development.<sup>138</sup>

However, this trend has progressed only slowly, mainly due to mutual suspicion, continued Gulf concerns over Iran’s growing power, and various contentious issues—not least Tehran’s support for armed non-state actors in the Middle East. Moreover, with the end of the war in Gaza, Arab states—led by Saudi Arabia—may have to decide on the future of the Abraham Accords and on possible cooperation with Israel to counter the Iranian threat. At the same time, they will have to reassess their position toward Tehran which, despite the blows it has suffered, is still considered an actor with significant deterrent capabilities.

137 Mohanad Faris, “Iran floats ‘dual-track approach’ as Baghdad playbook gets reconsidered.” *Amwaj Media*, November 4, 2025. <https://tinyurl.com/33sdxejb>

138 Yoel Guzansky, Raz Zimmt, and Galia Lindenstrauss, “The détente in the Middle East: Characteristics and implications for Israel.” *INSS Insight*, No. 1892, September 15, 2024. <https://tinyurl.com/bdhfdd2r>

In its efforts to strengthen ties with its Arab neighbors, Iran has drawn encouragement from their cautious stance on the war, driven primarily by fears of regional escalation that might spill over into their own territory. This concern has persisted even after the 12-Day War, as the Gulf states share the assessment that, in the absence of an arrangement between Iran and the United States, another round of war between Israel and Iran—potentially escalating into a broader regional conflagration—is only a matter of time. In addition, Arab states have expressed growing unease with what they see as Israel’s clear preference for the use of military force over political arrangements. In its recent diplomatic contacts with senior officials in the Arab world, Iran has sought to capitalize on mounting Arab fears about what they perceive as Israeli designs for regional hegemony. For example, in an August 2025 conversation with Egyptian Foreign Minister Badr Abdelatty, Iranian Foreign Minister Araghchi stressed the need to enhance coordination among Arab and Islamic states in confronting the “Greater Israel” project to seize Arab and Islamic lands.<sup>139</sup>

Following Israel’s failed September 2025 strike on Hamas’ leadership in Qatar, Tehran took advantage of the harsh Arab criticism of Israel to portray the operation as further proof of Israel’s aggressive intentions and of the need to step up coordination in the Muslim world against it. From the perspective of Arab states—particularly the Gulf monarchies—the strike in Doha was seen as yet another indication of Israel’s offensive ambitions in the region and further deepened doubts about their ability to rely on the United States as a dependable security patron. Iranian Foreign Ministry spokesman Esmail Baghaei reacted to the strike by saying that the incident should serve as a warning to regional states about the dangers of continued indifference to

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139 “Phone call between Araghchi and the Egyptian Foreign Minister regarding the ‘Greater Israel’ plan and the Gaza crisis.” *Mehr*, August 20, 2025. <https://tinyurl.com/48pwyynne>

Israel's aggression and violations of international law in the region.<sup>140</sup> In his speech at the summit of Islamic and Arab leaders in Doha, Iranian President Pezeshkian stated that the Israeli strike in Doha had proved that no Arab or Muslim state is immune from Israeli aggression, and that Islamic countries must unite against Israel.<sup>141</sup>

In sum, Iran faces serious challenges in the regional arena as well, above all regarding its ability to rebuild the “Axis of Resistance” it has cultivated over many years. Furthermore, Iran's basic capacity to expand its influence in the region is constrained by structural features of the Middle Eastern system—chief among them the region's demographic composition and the competing influence of other regional and international actors. The Islamic Republic has struggled in the past, and will likely continue to struggle, to become a regional hegemon in an area that is predominantly Arab and Sunni and that often views it as an alien—and even hostile—actor. Nevertheless, Iran has repeatedly demonstrated its ability to exploit every opportunity to strengthen its foothold and its status as a regional power. It is reasonable to assume that, despite the weakening of the Islamic Republic and the pro-Iranian axis, Tehran will continue to seize every opportunity to preserve at least part of its influence and to rebuild the capabilities of its regional allies within the “Resistance Front.”

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140 “Baqaei's response to the Israeli regime's terrorist operation in Doha.” *Tabnak*, September 9, 2025. <https://tinyurl.com/2p9sx836>

141 “Pezeshkian at the Doha Summit: Israel's attack on Qatar stemmed from desperation / The aggressor must be isolated.” *Tasnim*, September 15, 2025. <https://tinyurl.com/mr23vbmt>

## CHAPTER 5

# THE DOMESTIC ARENA IN IRAN AFTER THE WAR

The desire to ensure the regime's survival in the face of internal and external threats is a top priority for the Islamic Republic and a central driver of its security doctrine. Accordingly, even though developments in Iran's domestic arena during and after the war are not directly tied to changes in its strategy, they cannot be ignored in any discussion of the Islamic Republic's national security concept. Israel did not set the overthrow of the regime in Iran as an objective of the war, which was primarily intended to inflict serious and significant damage on the nuclear program and ballistic missile arsenal.

However, some of the measures Israel took during the war—especially in its second week—including the strike on Evin Prison in Tehran; attacks on IRGC headquarters, among them the Sarollah Headquarters responsible for security in the Tehran area; and on Basij and Internal Security Force facilities, were designed to undermine the regime's foundations and encourage the Iranian public to take to the streets and revive the popular protest movement.<sup>142</sup> Moreover, it is reasonable to assume that such actions would have continued and even intensified had the war not ended with a ceasefire after twelve days. In addition, the question of a campaign to change the regime in Iran may resurface and even escalate in a scenario of renewed fighting, which could expand to include attacks on vital national infrastructure and additional regime symbols.

### **The Conduct of the Regime and Public During the War**

There is no doubt that the Iranian regime suffered a severe blow, particularly in light of Israel's impressive opening strike, the strategic surprise, the heavy

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142 Raz Zimmt, "The Iran–Israel war and stability of the regime in Iran." *INSS Policy Paper*, July 29, 2025. <https://tinyurl.com/3eb4dzp7>

damage to Iran's nuclear, missile, and command-and-control systems, and the regime's inability to provide protection and security not only for its citizens but also for senior commanders and nuclear scientists who were assassinated by Israel. The Supreme Leader himself was forced into hiding for the duration of the war—a step that raised, and continues to raise, questions and doubts about his condition and the extent of his control over decision-making, especially given the fact that his public appearances have significantly declined since the end of the war.<sup>143</sup>

According to analyst Ali Alfoneh, in the absence of Khamenei—who, he claims, was forced to sever contact with the top echelon of the regime during the war for fear of an Israeli assassination attempt—strategic decision-making was transferred to an alternative leadership council. This council is said to have included the heads of the three branches of government: President Pezeshkian, Majles Speaker Mohammad Bagher Ghalibaf, and Judiciary Chief Gholam-Hossein Mohseni-Eje'i, as well as two representatives of the IRGC and the regular army.<sup>144</sup> Even if Khamenei's absence was only temporary, his advanced age (87) and mounting reports regarding his deteriorating health mean that the debate over succession—and indeed over the extent of his control—is already well underway.<sup>145</sup>

It can be assumed that the prospect, raised during the war, of the Supreme Leader's possible assassination accelerated the process of reviewing potential candidates to replace him in due course. In parallel with the possible decentralization of some of the Leader's authority during the war, parts of the president's powers were also transferred to the provincial governors. According to a government decision published by First Vice President Mohammad

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143 Kian Sharifi, "Khamenei's bunker leadership: What does it mean for Iran's future?" *Radio Free Europe / Radio Liberty*, June 27, 2025. <https://tinyurl.com/mukkyfm>

144 Ali Alfoneh, "Iran: Emergence of collective leadership amid low-intensity conflict." Arab Gulf States Institute, *Politics and Governance*, July 16, 2025. <https://tinyurl.com/y99tam94>

145 Karim Sadjadpour, "The Autumn of the Ayatollahs: What kind of change is coming to Iran?" *Foreign Affairs*, Nov–Dec 2025. <https://tinyurl.com/yc26atja>



Reza Aref, the government's decision-making authority at the provincial level was delegated to the governors in order to manage the situation more effectively and speed up decision-making in the wake of the Israeli attack. Under this decision, governors' executive decisions were to be considered decisions of the president and the government and therefore binding.<sup>146</sup> Interior Minister Esfandiar (Eskandar) Momeni stated that the delegation of authority was carried out in accordance with Article 127 of the constitution, which allows the president, in special circumstances, to appoint one or more representatives to take decisions on his behalf. He noted that this step had led to positive results.<sup>147</sup>

In any case, not only is there no indication that the measures taken by Israel during the war to undermine the regime's foundations advanced this goal; some of them appear to have had the opposite effect—at least for now. For example, the strike on the notorious Evin Prison, which serves among other things to incarcerate regime opponents and was ostensibly intended to galvanize public mobilization around the attack on one of the regime's symbols of repression, resulted in the deaths of many civilians. This in turn sparked harsh criticism of Israel, including from government critics and opponents of the regime inside and outside Iran.<sup>148</sup> Likewise, the attacks on Internal Security Force and Basij headquarters and assets did not lead to significant public mobilization, and it is highly doubtful that they seriously impaired the regime's repressive capabilities. In the final analysis, regime opponents did not seek to exploit the opportunity to advance political change, and citizens—some of whom were forced to evacuate their homes—had

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146 "Which government authorities were transferred to the provincial governors?" *Tasnim*, June 28, 2025. <https://tinyurl.com/3r6c2urc>

147 "Interior Minister: Part of the government's authorities have been transferred to provincial governors. *Asr-e Iran*, October 28, 2025. <https://tinyurl.com/3bch8rtm>

148 Lee Yaron, "Israel's attack on Iran 'caused deep injustice to opponents of the regime.'" *Haaretz*, September 25, 2025. <https://tinyurl.com/jhc7s697>

very limited capacity to go out into the streets and protest in the midst of the Israeli strikes.

During the war, the Iranian public demonstrated a considerable degree of “rallying around the flag” (the Iranian flag, not necessarily the flag of the Islamic Republic).<sup>149</sup> This is a familiar phenomenon with historical precedent—for example, the mobilization of the Iranian public in the early stages of the Iran–Iraq War, or the Soviet population’s rallying around the flag during World War II, despite the repressive and murderous policies pursued by the Stalinist regime before the war. However, this does not indicate a change in the public’s fundamentally hostile attitude toward a regime suffering from an ever-deepening legitimacy crisis, but rather a willingness to defend the homeland in its time of need against an external enemy.

Moreover, the harm inflicted on civilians and civilian infrastructure during the war triggered a wave of anti-Israeli sentiment even among regime opponents and critics, many of whom—including within the Iranian diaspora—are known for a critical or even hostile stance toward Israel. Among some segments of Iranian society, the war heightened fears that Israel seeks not only to damage the nuclear program or even to change the regime in Tehran, but also to fragment Iran and undermine its territorial integrity. The Israeli attacks intensified concerns about a slide into anarchy and civil war, which could allow radical domestic elements or foreign actors to impose on Iran a new political order not necessarily aligned with the will of its citizens. The sporadic signs of protest that had characterized the months before the war—mainly over economic issues such as the truck drivers’ protests—almost completely disappeared.<sup>150</sup> And even after the war there is still no sign of a structured,

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149 Mohammad Ayatollahi Tabaar, “The Islamic Republic’s new lease on life: How the U.S.–Israeli strikes empowered the Iranian regime.” *Foreign Affairs*, July 8, 2025. <https://tinyurl.com/mry7xayu>

150 Nitsan Freizler, Mora Deitch, and Raz Zimmt, “Iran from within: Analysis of protest events and regime support.” *INSS, Spotlight*, September 16, 2025. <https://tinyurl.com/edbvw66r>

organized opposition with a clear leadership capable of exploiting the severe blow to the regime, to challenge its very existence.

Furthermore, the regime demonstrated internal cohesion and a relatively rapid ability to recover from the initial strike it had suffered. It is unclear, however, to what extent it will be able to maintain this internal cohesion over time, especially in view of the growing internal criticism that has emerged over the past year from radical, revolutionary circles within the regime's own ideological support base. This criticism has focused, among other things, on the lack of response to the Israeli strike at the end of October 2024 and on the suspension of enforcement of the hijab law by order of the Supreme National Security Council.<sup>151</sup>

In any event, the Iranian regime will continue to see its survival as a supreme goal and act to preserve it as far as it can. At the same time, the Islamic Republic continues to grapple with a persistent and deepening legitimacy crisis, a worsening economic crisis, and severe structural hardships, foremost among them shortages of water and electricity. In recent years there has been a clear erosion of public trust in state institutions, alongside growing despair over the economic situation and a widening gap between the public and the ruling establishment.<sup>152</sup>

In addition, Iranian society continues to be characterized by internal disagreements and deep polarization. Already in the first days after the ceasefire, debate resumed between radicals and pragmatists on both foreign and domestic policy. The pragmatic-reformist camp called on the authorities to take confidence-building steps toward the public that could help preserve internal cohesion after the war.

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151 Raz Zimmt, "Overtaking on the right: The Iranian ultra-conservative challenge and its implications for regime unity." *Strategic Assessment*, 28(2), July 2025. <https://tinyurl.com/yc7x5xyn>

152 Raz Zimmt, "Regime change and the overall campaign against Iran." *INSS Insight*, No. 1934, February 4, 2025. <https://tinyurl.com/yn5xewr4>

The reformist cleric Mohammad Taghi Fazel Meybodi called for curbing extremist circles which, in his view, cause great harm and undermine national unity. In a press interview, Meybodi noted that radicals have penetrated key positions in government and behave as if there were no problems in the country, whereas it is perfectly clear that Iranian society faces many hardships and is in need of calm and cohesion.<sup>153</sup> Sociologist Mehran Solati stressed the responsibility of the Islamic Republic's authorities to reduce the deep gap that has emerged between the regime and the people. In his view, defending the country against future attacks will not be achieved solely through military build-up, but also through listening to the people; strengthening elected institutions; releasing political prisoners; expanding popular participation in decision-making processes; promoting economic development; integrating into the global economy; and redefining Iran's relations with the global powers.<sup>154</sup>

In August 2025, the Reform Front issued a statement listing demands for far-reaching changes in Iran's domestic and foreign policy. These demands included: renewing negotiations with the United States; suspending uranium enrichment in return for the lifting of sanctions; releasing all political prisoners; abolishing the Islamic dress code; and removing the IRGC from political involvement.<sup>155</sup>

### **Rising Repression Alongside Efforts to Ease Internal Tensions**

Despite growing calls from more moderate circles in Iran to respond to public demands, political and civil repression has not only failed to subside—it has intensified since the war. The sense of persecution and paranoia that

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153 “Fazel Meybodi's warning regarding the plan extremists have for the government.” *Khabar Online*, September 11, 2025. <https://tinyurl.com/yre4b82a>

154 “Mehran Solati: 12 lessons from 12 days of war!” *Turkmen Sahara Media*, June 29, 2025. <https://tinyurl.com/ymmuhfcu>

155 “In Iran, reformist call for broad policy U-turn sparks fierce backlash.” *Amwaj Media*, August 20, 2025. <https://tinyurl.com/bt8rs9d7>

characterizes the Iranian regime even in normal times—let alone during emergencies—has led to an escalation of repressive measures and tighter monitoring of individuals and groups perceived as threats to the regime. These measures included arrests, executions under the pretext (real or imagined) of pursuing spies and agents working for Israel, as well as the mass expulsion of hundreds of thousands of Afghan refugees.<sup>156</sup>

Although over time such actions may deepen the divide between the regime and the citizenry and reinforce radicalization trends in society, in the short term they help the authorities cope with internal challenges. Moreover, even after the 2024 election of Masoud Pezeshkian to the presidency, state institutions remain dominated by conservatives. No change is evident in the president's status relative to other power centers, particularly the Leader's office and the Islamic Revolutionary Guard Corps (IRGC). The August 2025 appointment of Ali Larijani—a pragmatic conservative—to the post of Secretary of the Supreme National Security Council likewise did not significantly alter the balance of power.

Nevertheless, aware of the deepening domestic crisis, the regime sought after the war to mobilize the public around ideas of nationalism, sovereignty, and territorial cohesion, including through the use of symbols associated with Iran's pre-revolutionary and even pre-Islamic past.<sup>157</sup> This is not a new phenomenon: the regime has long worked to cultivate a religious-Islamic nationalism and rally the public around motifs of Iranian national identity,<sup>158</sup> but the war accelerated this trend.<sup>159</sup> For example, the Supreme Leader's

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156 "Iran: Authorities unleash wave of oppression after hostilities with Israel." Amnesty International, September 3, 2025. <https://tinyurl.com/mwy2cehm>

157 Negar Mojtahedi, "Dented by war, Islamic Republic reaches for nationalism to shore up support." *Iran International*, July 18, 2025. <https://tinyurl.com/mr255u8u>

158 Raz Zimmt, "Solidarity in crisis: Collectivism and national identity in the Islamic Republic in an era of protest." *Strategic Assessment*, 26(1), March 2023. <https://tinyurl.com/484xkece>

159 Erika Solomon & Sanam Mahoozi, "Iran's leaders turn to a new brand of nationalism after Israeli and U.S. attacks." *The New York Times*, July 22, 2025. <https://tinyurl.com/yabfub3z>

public appearance on the eve of the Shiite Ashura holiday—his first since the outbreak of the war with Israel—drew considerable attention when he asked Mahmoud Karimi, one of Iran’s prominent religious preachers, to sing the patriotic anthem “*Ey Iran*,” a song made famous during the Shah’s rule.<sup>160</sup> A commentary in the state-run newspaper *Iran* highlighted the need to combine the religious and pre-Islamic cultural components of Iranian identity, writing:

Ancient Iranian civilization, with its millennia-old roots, is rich with noble values. The adoption of Islam did not weaken this culture—on the contrary, integration with the spiritual depth of Islam led to even greater flourishing. This synergy created a unique identity that distinguishes Iranians from others. The Islamic–Iranian culture, with its distinctive authenticity, not only withstood cultural and political invasions but remained stable as a unifying axis during decisive moments in history.<sup>161</sup>

The Iranian leadership found encouragement in the national mobilization around solidarity and patriotism, and in the fact that regime critics did not exploit the external threat to instigate revolt. In a speech on 16 July 2025, Supreme Leader Khamenei said that Israel expected an attack on Iran to weaken the regime and spark an uprising by dormant opposition cells and anti-regime elements, leading masses into the streets. In reality, he asserted, the opposite occurred. Citizens indeed took to the streets—but in the opposite direction from what the enemy intended: in support of the regime.<sup>162</sup>

From the Leader’s perspective, the war demonstrated not only the public’s supposed support for the regime but also confirmed his view that Iran’s

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160 Fatemeh Torkashvand, “Leader blurs lines between faith and nation with ‘*Ey Iran*’ performance.” *Tehran Times*, July 7, 2025. <https://tinyurl.com/yc8pc8k7>

161 “The three pillars of Iran’s stability and endurance.” *Iran*, July 10, 2025. <https://tinyurl.com/mvvzy7x5>

162 “Statements in a meeting with the head and senior officials of the judiciary.” *Website of Iran’s Supreme Leader*, July 16, 2025. <https://tinyurl.com/42avetdf>

enemies—foremost the United States and Israel—are striving to topple the regime by supporting its opponents at home and abroad and by applying political, economic, and military pressure. According to Khamenei, the nuclear program serves merely as a pretext for the West to pressure, isolate, and weaken Iran as part of a broader strategic goal: regime change. For example, in a speech marking the 35<sup>th</sup> anniversary of the revolution, Khamenei claimed that American politicians tell Iranian officials that they do not seek regime change, but they are lying: “They would not hesitate for even a minute if they could destroy the foundations of the Islamic Republic.”<sup>163</sup>

Alongside the effort to rally society around national solidarity, Iranian authorities showed some willingness to be flexible and to respond to certain public demands. A prominent example is the reduced enforcement of the Islamic dress code, particularly in Tehran, where increasing numbers of women appear in public without a headscarf and face no interference.<sup>164</sup> In a speech in August 2025, President Pezeshkian emphasized the need to promote internal unity and stated that the hijab issue cannot be addressed through coercion, which generates resistance and may even lead citizens to abandon their faith and develop alienation or hatred toward religion.<sup>165</sup> The government also decided to withdraw a controversial bill intended to combat the spread of “fake news” on social media, following public criticism that it would severely damage the already limited freedom of expression.<sup>166</sup>

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163 “Khamenei: US wants regime change in Iran.” *Islamweb.net*, February 9, 2014. <https://tinyurl.com/mrx4n2yy>

164 Fereshteh Ghazi & Farangis Najibullah, “Iran’s streets ‘transformed’ as more women shun the mandatory hijab.” *Radio Free Europe/Radio Liberty*, October 11, 2025. <https://tinyurl.com/5t37nny7>

165 “Pezeshkian: I do not want to increase fuel prices for the underprivileged.” *Eqtesad-e Mo’aser*, August 10, 2025. <https://tinyurl.com/43fkb56m>

166 “Iran withdraws ‘fake news’ bill after public outcry.” *Radio Free Europe/Radio Liberty*, July 30, 2025. <https://tinyurl.com/2p5bvrvv>

However, these measures do not represent a fundamental policy shift, nor do they address the deepening domestic crises. Moreover, even these limited steps provoked criticism from hardline factions. Ayatollah Abbas Ka'abi, a member of the Assembly of Experts, criticized what he called insufficient enforcement of the hijab mandate, saying it is an explicit constitutional obligation and that neither the government nor the Supreme National Security Council has the authority to prevent its implementation.<sup>167</sup> Comments by Mohammad-Reza Bahonar, a member of the Expediency Council, who expressed reservations about strict hijab enforcement, also sparked intense reactions. Hossein Shariatmadari, the editor of the hardline daily *Kayhan*, attacked the former Majles member, saying that if hijab is a religious obligation and a legal requirement, there is no reason not to enforce it.<sup>168</sup>

### **Structural Changes in the Political–Security Leadership**

The process of drawing lessons and rethinking security doctrine, force building, and modes of operation after the 12-Day War is also evident in the early implementation of structural changes at the top of Iran's political–security system. The news site *Noor News*, affiliated with former Supreme National Security Council Secretary Ali Shamkhani, recommended organizational reforms in the security system following the war. In a July 2025 article, the site argued that Iran's threat environment had changed after the war, requiring a reorganization of the state's decision-making system.

The article claimed that Iran must adjust to confronting hybrid threats that undermine both its soft and hard power, carry out structural reforms in its security apparatus, and improve its efficiency amid growing threats.

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167 Ayatollah Ka'abi: The hijab is an explicit constitutional obligation, and the government cannot say it has no involvement in the matter / The Supreme National Security Council cannot prevent the Hijab and Chastity Law. *Khabar Online*, October 19, 2025. <https://tinyurl.com/yv8x36cf>

168 "Top Iranian conservative sparks fury with claim of no 'binding' hijab law." *Amwaj Media*, October 14, 2025. <https://tinyurl.com/374b7frz>



The site emphasized that the end of the war does not signal the end of the crisis or the beginning of a period of calm. Iran faces a new phase requiring redefinition of the foundations of power and improvements in governance and decision-making capabilities to meet emerging strategic challenges. This includes shifting from tactical and reactive decision-making to strategic decision-making based on scenario analysis rather than merely responding to concrete threats. *Noor News* recommended creating new institutions, among them a Strategic Command Center, to meet the complex needs of the security, economic, and diplomatic sectors. It also noted that restoring public trust is essential to national security, alongside military strength.<sup>169</sup>

Indeed, in early August 2025, the Supreme National Security Council announced the establishment of the Defense Council (Shura-ye Defa'), to be chaired by the president and composed of the heads of the three branches, the Leader's two representatives on the Supreme National Security Council, the intelligence minister, the chief of staff of the armed forces, the IRGC commander, the regular army commander, and the commander of Khatam al-Anbia Emergency Headquarters. The Council was tasked with the centralized review of defense plans and upgrading the capabilities of the armed forces.<sup>170</sup>

The Defense Council may be considered a modern—though distinctly different—version of the Supreme Defense Council established after the 1979 Islamic Revolution and responsible for managing the security system during the Iran–Iraq War (1980–1988). That council included seven members: the president (as chair), the prime minister (a position abolished in 1989), the defense minister, the chief of staff, the IRGC commander, and two representatives appointed by Khomeini. After the outbreak of the war, its powers were expanded and it became the top coordinating body for all military operations, including

169 “Strategic Command Center: The engine of post-war governance.” *Noor News*, July 29, 2025. <https://tinyurl.com/bdhyf3c>

170 Raz Zimmt, “Changes in Iran’s Supreme National Security Council: Systemic Overhaul or Cosmetic Adjustment?” *INSS Insight*, No. 2026, August 26, 2025. <https://tinyurl.com/2zx8s8zr>

strategic decision-making, resource allocation, and coordination among forces. It was dissolved after the war with the establishment of the Supreme National Security Council.

In parallel with the establishment of the new council, the Supreme Leader appointed his adviser and former Majles speaker Ali Larijani as Secretary of the Supreme National Security Council and his representative on the council, replacing Ali-Akbar Ahmadian. Before serving as Majles speaker (2012–2020), Larijani had been Secretary of the Council and Iran’s chief nuclear negotiator. In 2007, only two years after becoming secretary, he resigned following sharp disagreements with President Mahmoud Ahmadinejad. He was replaced by Saeed Jalili, identified with the radical camp and one of the harshest critics of the nuclear negotiations conducted during Hassan Rouhani’s presidency and of the 2015 nuclear agreement.

Larijani is considered a pragmatic conservative who, like other conservative politicians, accepted the need to adjust revolutionary ideology to contemporary conditions. During his tenure as Majles speaker, he supported President Rouhani’s policies, drawing the ire of hardliners. His presidential bids in 2021 and 2024 were disqualified by the Guardian Council. Nevertheless, after the death of President Ebrahim Raisi in a helicopter crash in May 2024, his involvement in political affairs increased. In late 2024 he was sent as the Leader’s special envoy to Lebanon and Syria (before the fall of the Assad regime), and in July 2025 Khamenei sent him on an official visit to Moscow, where he met Russian President Vladimir Putin. His return to the top of the political hierarchy likely reflects Khamenei’s desire to bring experienced veteran politicians back into the decision-making circle in Tehran—a desire strengthened after the war, particularly following the elimination of several senior Iranian commanders in Israel’s opening strike. Larijani’s appointment was also likely intended to send a conciliatory message both domestically and internationally, though the radical Jalili remains one of the Leader’s two representatives on the Council.

Groups associated with Iran's pragmatic and reformist camp welcomed Larijani's appointment and expressed hope that it signaled the beginning of a new, more moderate and conciliatory era in Iran's foreign policy. This expectation stems from the strategic crossroads the Islamic Republic faces after the 12-Day War, including forthcoming decisions on whether to return to negotiations with the United States or escalate further against the U.S. and Israel. Mahmoud Vaezi, former chief of staff to President Rouhani, said that Larijani's return would symbolize a change of approach, a correction of previous policies, and gratitude to the public that supported the regime in unprecedented numbers during the war.<sup>171</sup>

Heshmatollah Falahatpisheh, former member of the Majles Committee on Foreign Policy and National Security, argued that Larijani's presence on the council would send a message to the West that Iran views its national security through a diplomatic and realist lens. It would also strengthen the political-civilian composition of the council, whose increasing dominance by military representatives in recent years had harmed its ability to seize diplomatic opportunities before the outbreak of the June 2025 war.<sup>172</sup>

Mohammad-Mehdi Mojtahedi, head of research at the Center for Strategic Studies in the presidential office, expressed hope that Larijani would focus—as part of the re-evaluation of Iran's national security doctrine—on uniting all national assets around a shared fate. He emphasized that revising the national security strategy is the most urgent and essential task. After the war, with the danger of renewed conflict still present, all officials—especially the new secretary—should prioritize strengthening Iran's resilience in the framework of a “strong society, strong state” approach. This requires national dialogue

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171 “Va‘ezi: If Larijani's return is the first step in a change of approach, it is a constructive step.” *Khabar Online*, August 4, 2025. <https://tinyurl.com/yc6wammy>

172 “Larijani's presence in the Supreme National Security Council carries a message for the West.” *Tabnak*, August 3, 2025. <https://tinyurl.com/6tu5xehz>

and a sense of collective destiny to ensure Iran's preservation, defense, and survival in the face of internal and external threats.<sup>173</sup>

Supporters of the Defense Council's establishment argued that the measure was necessary due to the war, increasing security challenges, and the tightening of sanctions on Iran following the activation of the snapback mechanism. In their view, these challenges require more efficient decision-making during emergencies and better preparedness for complex security scenarios. The Council's creation would support, they argued, greater administrative centralization and faster, more effective decision-making in emergencies, such as a renewed Israeli attack.

Esmail Kowsari, a member of the Majles National Security and Foreign Policy Committee, stated in an interview that when the country is in a state of war, changes must be made in the management of the national security apparatus so that appropriate wartime decisions can be made more quickly and so that Iran can surprise the enemy.<sup>174</sup> The reformist daily *E'temad* argued that the establishment of the Council is not merely a technical step but a paradigmatic change that will improve crisis management and decision-making under the Supreme Leader's command in wartime.<sup>175</sup> The conservative SNN news agency similarly argued that the presence of senior commanders alongside the heads of the three branches and the Leader's representatives would improve the efficiency of military decision-making and allow the Supreme National Security Council to focus on shaping the overall strategic policy of national security, including economic, social, political, and international dimensions. Moreover, a centralized, powerful security decision-making

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173 "The regime stands at a historic crossroads / Many of those disqualified [from elections] can also be appointed to positions like Larijani." *Khabar Online*, October 5, 2025. <https://tinyurl.com/msd93m3a>

174 "The Supreme Defense Council was established to surprise the enemy / In wartime decisions must be taken quickly." *Dana*, August 4, 2025. <https://tinyurl.com/mtykarnm>

175 "From the 'Supreme Defense Council' to the 'Defense Council.'" *E'temad*, August 4, 2025. <https://tinyurl.com/d23h93jz>

body would send a clear deterrent message to Iran's enemies that the state is determined to defend its sovereignty and national interests and possesses all necessary mechanisms to cope with any crisis.<sup>176</sup>

Since the announcement of the Defense Council's creation, Iranian media have not reported on its activity areas, and it is unclear whether it has indeed discussed Iran's updated strategy or any operational plans. In any case, it is doubtful whether the Council's establishment provides the Iranian leadership with the tools needed for comprehensive, improved management of the post-war reality. Only far-reaching changes to Iran's security strategy—adapted to the dramatic developments in Iran and the region—together with significant improvements in strategic military capabilities, institutional reforms not only in the security realm but also in political, economic, and social spheres, and shifts in foreign policy, could help the Islamic Republic improve its ability to meet the challenges it faces.

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176 "Strengthening national-level management of the war arena / The Defense Council re-established after 36 years." *SNN*, August 4, 2025. <https://tinyurl.com/mrwjupp7>

## SUMMARY AND RECOMMENDATIONS

On the eve of the Sukkot holiday in 2025, former Defense Minister Avigdor Lieberman managed to stir a minor storm when he warned of Iranian intentions to attack Israel. In a post on his X account, Lieberman wrote that anyone who thinks the episode with Iran is over is “wrong and misleading,” and that the Iranians are already working vigorously to strengthen their military capabilities. He called on Israeli citizens to exercise extra caution over the holiday and to remain close to protected spaces.<sup>177</sup> Following his remarks, which sparked public alarm, a security official clarified that there had been no change in directives and that no unusual event involving the Iranians was expected in the near future. Another Israeli official accused Lieberman of baseless fear-mongering intended only to attract headlines.<sup>178</sup>

Even if Lieberman’s warnings were exaggerated, there is no doubt that the nature of the new reality created by the 12-Day War is far from stable. The working assumption in Tehran is that renewed fighting is only a matter of time, and that Israel is determined to resume the campaign and may even seek to exploit a future round of fighting to promote regime change. In this reality, Iran appears, for now, to prefer focusing on rebuilding capabilities damaged in the war, chiefly its ballistic missile arsenal and air defenses. Despite growing voices in Tehran calling for a harsh response to the renewal of sanctions following activation of the snapback mechanism—including by withdrawing from the Nuclear Non-Proliferation Treaty (NPT) or even crossing the threshold to nuclear weapons—the Iranian leadership is currently refraining from high-risk decisions that could trigger another Israeli, and possibly American, strike. At this stage, there are also no signs that Iran is seeking to reconstruct the

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177 The X account of Avigdor Lieberman, October 3, 2025. <https://tinyurl.com/5c9d4hmk>

178 Nitzan Shapira, “Lieberman: The Iranians will surprise; it’s best not to stray from protected areas / Security source: No unusual event or change in instructions.” N12 News, October 3, 2025. <https://tinyurl.com/4t4h5m72>

nuclear facilities hit in the war and its enrichment capabilities—let alone to resume weaponization efforts, as it did in the months preceding the war. Most of its efforts are directed at restoring its missile arsenal and improving accuracy, rebuilding air defenses and strengthening the air force, and possibly activating a new enrichment site south of the Natanz enrichment facility that was damaged in the war.

That said, it is highly doubtful that the current status quo can be sustained for long. Iran's Supreme Leader himself has warned against the continuation of a "no war, no peace" situation.<sup>179</sup> Iran now stands at an important crossroads. The consequences of the 12-Day War, the lessons of the regional campaign after October 7, and the approach of the end of the Khamenei era all require a renewed assessment of the strategic balance, Iran's policies in the regional and international arenas, and its security doctrine.

However, even after the surprise blow Iran suffered in June 2025, senior officials in the country continue to cultivate the narrative of victory in the war. The need for adjustments and improvements in national security doctrine has not escaped the leadership's attention, but for now this does not appear to be generating a fundamental change in Iranian strategy. From Khamenei's perspective, the war actually reinforced several of his core assumptions: deep mistrust of the United States; the belief that negotiations with Washington are futile; and the view that even compliance with Western demands on the nuclear issue would not satisfy the US administration, which he believes is ultimately striving for regime change.

This does not mean that another round of fighting between Iran and Israel, and possibly also with the United States, is inevitable. Iran will not necessarily rush to take steps that would provide Israel and the United States with a pretext for another attack, especially as long as parts of its military capability have not been restored. Even President Trump's withdrawal from

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179 "Statements in a meeting with the president and members of the government." *Website of Iran's Supreme Leader*, September 7, 2025. <https://tinyurl.com/5378afpd>

the nuclear deal in 2018 did not lead to an immediate Iranian response. For a year, Iran abided by its commitments under the agreement and adopted a policy of “strategic patience,” hoping to bear the economic burden at least until the 2020 US elections. However, the intensifying US economic pressure and the European states’ alignment with sanctions led, by the summer of 2019, to a policy shift. Tehran began gradually rolling back its commitments under the agreement and taking provocative military actions against US partners—most prominently the attack on Saudi oil facilities in September 2019—but also against the United States itself, starting with the downing of an American drone over the Persian Gulf in June 2019 and culminating in attacks on American citizens and the storming of the US Embassy in Baghdad.

Will Iran change its policy once it has restored its capabilities, or will it wait patiently for the end of President Trump’s term, or for the moment it assesses that the risk of breaking out to nuclear weapons is lower than the risk inherent in perpetuating the current status quo? It is hard to know, but it is clear that in the absence of a political arrangement—or at least the removal of the immediate risk of another round of fighting—Tehran may eventually conclude, even if such a conclusion is mistaken and dangerous, that another war, or some kind of limited provocation against Israel, the United States, or their regional partners (for example in the Persian Gulf) could allow it to showcase improved capabilities, restore its prestige, and open a path out of the current dead end.

Despite the ongoing erosion in the standing of 87-year-old Khamenei and his increasingly rare public appearances, decisions on major changes to Iran’s security doctrine remain, to a large extent, in his hands. At this stage, the chances of far-reaching shifts are low as long as Khamenei holds the reins of power. Moreover, Iran does not currently have particularly good options. It can, in principle, decide to change its nuclear doctrine, rebuild the damaged sites, or break the nuclear threshold, but such a decision would involve major risks, including the possibility of another military strike.



The reconstruction of missile and air defense capabilities is expected to continue, but it is doubtful that this will provide Iran, in the foreseeable future, with significantly improved ability to cope with the capabilities of the IDF, let alone with those of the US military. In the regional arena, there is at this stage no indication that Iran intends to abandon its partners, despite the growing constraints and pressure on it and on the pro-Iranian axis it leads. Not only is support for the “resistance” portrayed in Iran as an ideological, religious, and moral obligation; from Tehran’s perspective, continued activity against Israel through armed militias is now considered even more essential given Israel’s increasing use of military force in the region.

On the domestic front, the Iranian regime does show some willingness to adapt revolutionary ideology to changing circumstances and public demands—especially those of the younger generation. However, its commitment to the values of the revolution, coupled with fears that sweeping reforms might undermine regime stability, currently prevents major internal change. Ultimately, the Iranian leadership appears to prefer limited adjustments within the existing paradigm—seeking partial fixes to exposed breaches—rather than fundamental shifts in overall strategy.

The difficulty of formulating a long-term strategy after the 12-Day War is reflected in an interview given by Ali Abdollah Khani, head of the Political and International Affairs Department in the Office of Iran’s Vice President for Strategy, to the *Noor News* website. According to him, in the wake of the war, Iran finds itself in a state of instability and ongoing crisis, in which the leadership focuses mainly on the prospect of renewed confrontation with Israel and the United States. Repeated warnings of an impending war that does not materialize, and the shift to a reactive policy, have created a state of “anti-strategy”—that is, a situation in which policy revolves around responding to an expected scenario rather than shaping an active strategy. Abdollah Khani argued that such thinking prevents the design of a long-term strategy capable of addressing Iran’s serious problems, including the need

for reconstruction, economic growth, and improved deterrent and defensive capabilities. The country remains in a “permanent emergency,” in which war seems likely at any moment, and instead of shaping proactive policy and planning ahead, it continuously reacts to scenarios and potential threats.

Abdollah Khani stressed that while one must accept the basic assumption that war is a constant possibility, the regime cannot allocate all its resources to war preparations. Instead of managing crises, it must manage the future and move from crisis-based to vision-based governance. He proposed that Iran adopt a “balanced and hybrid” security strategy that combines economic, technological, and diplomatic tools with continued emphasis on developing military capabilities. Abdollah Khani also offered a series of operational and tactical recommendations, including: improving long-range missile capabilities, particularly accuracy, strike tempo, and the resilience of supply chains for strategic components used in production and maintenance; preserving and strengthening medium- and short-range missile capabilities in the Persian Gulf and Arabian Sea, including dispersal of arsenals, sensitive sites, and critical infrastructure to enhance survivability; and decentralizing defense, command, and control authorities (including at local–provincial levels) to improve decision-making efficiency in wartime.<sup>180</sup>

In any case, the Iranian leadership will be required, in the foreseeable future, to continue reassessing its policies and strategic concepts. This process unfolds against the backdrop of preparations for the end of the current Leader’s tenure—a development that could lead to far-reaching changes in the Islamic Republic. In this context, it is reasonable to assume that Iran’s weakening as a result of the regional campaign and the 12-Day War is not necessarily irreversible. Iran faces major challenges: a deepening internal crisis; the defeat of Hezbollah; the collapse of the Assad regime; the defeat of Hamas; severe

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180 “Alternative plans for exiting the ‘no war, no peace’ situation.” *Noor News*, October 13, 2025. <https://tinyurl.com/2z295cwm>

damage to its nuclear and missile capabilities; and increased international pressure. At the same time, it can benefit from a series of opportunities: Hamas' survival in the Gaza Strip; the difficulties and delays in dismantling Hezbollah's military capabilities; instability in Syria; the rivalry between the United States and Russia and China, which enables these powers to maintain partnerships with Tehran; damage to Israel's international standing due to the war in Gaza; the rise of antisemitism worldwide; and a growing tendency among regional states to view Israel as an aggressive actor and a security threat to regional stability. Ultimately, Israel's success in the ongoing campaign against Iran will depend largely on its ability to exploit the current window of opportunity to advance efforts to shape a new regional reality that will help contain Iran, weaken it, and reduce its capacity to leverage these opportunities to regain strength.

### **Recommendations for Israel**

The crossroads at which Iran currently stands—and the fact that, at least for now, it does not appear to have particularly good options—confront Israel with a tense and unstable reality, but also with a window of opportunity to continue its efforts against Iran and its regional partners. Such efforts may allow Israel and the United States to translate their impressive military and operational achievements of recent years, including in the 12-Day War, into long-term political gains.

The danger of escalation, which could end in renewed fighting or an Iranian breakthrough to nuclear weapons, grows as time passes. This risk may arise from miscalculation between Iran and Israel, from provocative Iranian steps in the nuclear domain (for example, resuming uranium enrichment), or from a limited provocation against Israel, the United States, or their regional partners (for example, in the Persian Gulf). Moreover, the lesson-learning process (including regarding Israeli operational and intelligence capabilities demonstrated during the war) and improvements in Iranian weapons systems,

alongside the possibility that in the next round Israel will also target national infrastructure that was not attacked in June 2025, may make a future round of fighting more dangerous, including the risk of escalation into a regional war.

Before the war, Israel faced a choice between supporting a political arrangement between Iran and the United States or turning to the military option. Once a decision was made in favor of military action, Israel now needs a policy that balances the pursuit of a restrictive framework—one that includes tight supervision by the International Atomic Energy Agency (IAEA)—with the preservation of enforcement and intervention capabilities that will allow it to disrupt any attempt to break through to nuclear weapons.

**Given this reality, Israel should act on several fronts:**

1) Preparing for another campaign, particularly in a scenario of Iranian restoration of nuclear capabilities or, worse, a breakout to nuclear weapons. Israel must develop flexible operational capabilities, employing a range of tools based on the lessons both sides drew from the 12-Day War and taking into account possible changes in Iranian strategy and force employment, especially in missile and air-defense capabilities.

Such a campaign would rest on several core principles, including: close coordination with the United States; technological and intelligence surprises; surprise opening moves; destruction of military capabilities in order to deny Iran the ability to strike Israel's home front and degrade Iranian air defenses; and attacks on targets designed to undermine regime foundations. There is no guarantee that the impressive intelligence and operational capabilities displayed during the war will be preserved in the future—especially in light of the assessment that Iran will draw lessons from the strikes, develop a deeper understanding of Israeli–American offensive capabilities, and improve its defensive and concealment systems against military threats.

Moreover, enforcement may lead to renewed fighting and even drag Israel into a prolonged war of attrition that would impose weighty constraints on

routine life in the country. It is also unclear whether close coordination with the United States will endure over time, and whether Washington's position regarding Israeli freedom of action will remain unchanged in light of possible political shifts in the US in the coming years or changes in American global priorities.

2) Preserving and developing covert disruption capabilities, with priority for enforcement below the threshold that triggers an Iranian response, in order to prevent—or at least delay—the restoration of Iran's nuclear and missile capabilities. In parallel, Israel must continue improving its own ability to cope with the missile threat.

3) Reducing the possibility of Russian and Chinese assistance in rebuilding Iran's military capabilities, particularly in the nuclear, ballistic missile, air force, and air-defense domains. At the same time, Israel should exploit the potential leverage of Russia and China over Iran to encourage Tehran to accept a political arrangement and give up its pursuit of nuclear weapons.

However, Israel must recognize that at this stage the aim of driving a wedge between Iran and its partners in Moscow and Beijing lacks feasibility. At most, Israel can continue to engage with China and Russia (in coordination with the United States) to try to limit the risks inherent in ongoing cooperation among Iran, Russia, and China—especially the risk that advanced weapons systems will be supplied to Iran. Israel should underscore to Russia and China its firm opposition to the transfer of advanced weaponry to Iran and its determination to act against any system that could threaten its security.

4) Leading an international and regional effort to promote a stable, long-term agreement with Iran that blocks its path to nuclear weapons. A new nuclear agreement is likely the only way to renew IAEA inspections—halted after the war—and even improve them compared to the 2015 nuclear deal. The IAEA's inspectors possess the experience, expertise, and capabilities (even if not foolproof) to try to determine what happened to the fissile material Iran possessed before the war and to account for what remains.

In the absence of an agreement, intelligence alone would be required to detect activities aimed at enriching uranium to 90%, converting it to metallic form, or moving toward a nuclear weapon. Some of these activities will likely leave “tell-tale signs,” but it must be assumed that intelligence capabilities to identify them are not flawless. Furthermore, a strong IAEA inspection regime would provide political legitimacy and a seal of approval for international action—including another strike—if Iran refuses to grant inspectors access to suspicious sites.

A nuclear agreement (assuming it is not exploited by Iran to conceal progress along a covert military track) also commits the international community—led by the United States—to prevent Iran from acquiring nuclear weapons over the long term, and may buy time until internal political change processes in Iran mature. It must be recognized that Tehran is unlikely to forgo its insistence on the right to enrich uranium (at a low level of 3.67%) on its own soil, even under current conditions. However, the disabling of its enrichment facilities might encourage Iran to accept a creative solution (for example, a regional nuclear consortium) that could bridge between the US position, which opposes enrichment in Iran, and Tehran’s position.

Yet an agreement in itself does not guarantee long-term Iranian compliance and will not necessarily prevent progress along a covert route utilizing residual capabilities. Moreover, an agreement expected to lift or significantly ease economic sanctions would throw the regime a lifeline and strengthen its ability to continue negative activities in various arenas. Such an agreement could also constrain Israel’s freedom of action vis-à-vis Iran, unless accompanied by informal understandings between Israel and the United States. Military strikes may also make it harder for the IAEA to conduct an effective “material assessment” to identify remaining fissile material, and it is doubtful that Iran would agree to intrusive monitoring even under a political arrangement.

Therefore, an agreement is desirable for Israel only if it includes significant restrictions on uranium enrichment, clarification of the fate of the fissile

material remaining in Iran, and intrusive, stringent IAEA monitoring—including Iranian re-ratification of the Additional Protocol under the NPT, expanded IAEA authorities, and resolution of the ambiguities in the 2015 deal regarding inspections of suspicious military sites. Time-limited restrictions (“sunset clauses”) should be avoided, or at least accompanied by an option to extend them once their validity expires. Enforcement and monitoring of potential weaponization-related activities under Section T of the 2015 agreement must also be tightened, including activities that could support the development of a nuclear warhead.

5) In the absence of such an agreement, due to ongoing fundamental gaps between Tehran and Washington, efforts should be made to promote understandings—even if informal—between the United States and Iran. For example, an understanding that Israel will not initiate an offensive move against Iran as long as Tehran does not rebuild its nuclear program, particularly enrichment and weaponization capabilities.

6) In any case, Israel must establish a credible threat to regime stability that will deter Iran from activities that bring it closer to acquiring nuclear weapons. It should be made clear to Tehran that Israel will not allow the Iranian regime to survive with nuclear weapons, and that any move to restore the nuclear program—especially an attempt to break through to a bomb—will inevitably lead to strikes against national infrastructure, military targets, and regime symbols that could jeopardize the regime’s very survival. In addition, Israel should develop its capacities for military action aimed at undermining regime stability in the event that deterrence against Iran fails.

7) Diverse channels must be established to convey messages from Israel to Iran in order to reduce the risk of miscalculation.

8) In the regional arena, ongoing enforcement efforts are needed to prevent the reconstruction of the pro-Iranian axis, especially Hezbollah, and to limit Iran’s ability to rebuild its proxy network. Israel must preserve the IDF’s freedom of action to continue enforcement in Lebanon and the Gaza Strip

and, where necessary, also in Yemen, Iraq, and Syria, in order to thwart attempts to restore Iran's regional proxies. Furthermore, the United States and Israel should work with regional partners to forge a coordinated approach to monitoring Iranian efforts to supply weapons, equipment, training, and funding to armed militias, and to restrain them.

9) Iran's ability to expand its regional involvement and influence derives largely from the weakness of the states in which it seeks to operate and from conditions of instability and conflict. Political arrangements and de-escalation processes in the region—including in Lebanon, Syria, Iraq, Yemen, and the Palestinian arena—can significantly limit Iran's ability to exploit crises as opportunities to deepen its influence. In this context, steps such as removing Hamas from power in the Gaza Strip while stripping it of its military capabilities; continued efforts to disarm Shiite militias, foremost Hezbollah; beginning the reconstruction of Gaza; expanding economic assistance to Lebanon with Western and Arab support; strengthening state institutions in Lebanon and Iraq; and renewing efforts toward Israeli-Arab normalization may all help shape a new political reality that reduces the influence of the pro-Iranian axis.

Forming a regional coalition of states focused on building a new architecture for regional cooperation and economic development—one that is not necessarily explicitly anti-Iranian, but offers an alternative to Tehran's regional vision—could also contribute to this goal.

10) In the internal Iranian arena, a sustained effort is needed to weaken the regime. International political and economic pressure on Iran (even in parallel to a nuclear agreement with Tehran) must continue in order to weaken, isolate, and exhaust the regime economically and diplomatically. This effort should address the full range of issues in which Iran challenges the international community, including its missile program, regional activities, involvement in terrorism, online cyber-influencing operations, and human-rights violations.



Regime change in Iran is a legitimate, and perhaps even preferable, objective given the range of threats the Islamic regime poses to Israel, the region, and the international community. Regime change (or at least a shift within the regime—for example, the rise of more pragmatic elements, or even a takeover by the IRGC) would not necessarily alter Iran’s strategic goals, some of which reflect continuity from the pre-1979 era. However, such a change might reduce ideological commitment to the destruction of Israel and make it harder for the new leadership to build an ideologically driven Shiite axis similar to that constructed under Khamenei.

In any case, regime change depends mainly on factors beyond Israel’s control and on a trigger that cannot be predicted in advance. Historical experience shows that attempts to bring about regime change through foreign (even military) intervention are highly questionable. Since it is impossible to know if and when such change will occur, it cannot serve as a working assumption for strategic planning.

Until the hoped-for change occurs, measures can be taken to weaken the regime and minimize its ability to generate threats to Israel’s national security. In parallel, dedicated capabilities should be developed for use in a scenario of renewed mass protest—for example, tools to circumvent internet shutdowns; mechanisms for economic support that allow citizens and workers to subsist during strikes and demonstrations; and special capabilities to disrupt or undermine the regime’s repressive apparatus “on the day.” Diplomatic, economic, informational, intelligence, and other measures that can empower internal forces favoring change should also be advanced.

11) If Israel makes a strategic decision to promote regime change in Iran—or at least to weaken it (whether through military and/or overt measures, or by soft and/or covert means), it should examine the tools and courses of action to be employed according to two main criteria. First, can these tools shift the balance of power in favor of the regime’s opponents? Second, do they

contribute to achieving Israel's overarching goals in its vital, comprehensive campaign against Iran?

Israel's top priority must remain to block Iran's path to nuclear weapons. Therefore, Israel should prefer a strategy that realizes this objective—military or political—even if this requires deferring, to some extent, efforts to promote regime change. For example, if the goal of preventing Iran's progress toward nuclear weapons can be achieved through a political arrangement that eases sanctions, Israel should consider supporting such a move even if it temporarily strengthens the regime.

The 12-day war between Iran and Israel in June 2025 marked the sharpest escalation to date in the ongoing confrontation between the two states. Despite its relatively short duration, the war had a destabilizing effect on the Islamic Republic due to the success of Israel's opening strike, the decision of the United States to join the campaign, and the damage sustained by Iran's critical strategic systems—notably its nuclear program and long-range missile arsenal. Since the end of the war, Iran has engaged in an ongoing process of drawing lessons from the serious gaps revealed in the Islamic Republic's deterrence and defense capabilities.

The Iranian leadership is certainly aware of the need for improvements and adjustments to its national security doctrine; yet for now, this does not appear sufficient to produce a fundamental shift in Iranian strategy. It seems that Iran prefers to make adjustments within the existing framework by finding acceptable solutions to the gaps exposed rather than introducing major changes to its overall strategy. In any event, the new reality in Iran created by the war is characterized by instability, and it is doubtful whether the current status quo can endure for long. This is exacerbated by the growing possibility of a miscalculation between Iran and Israel that would lead to renewed clashes, or high-risk decisions by Iran on both the nuclear issue and on the regional front.

This memorandum seeks to examine the lessons that Iran is drawing from the war and its implications in four main areas: the nuclear program, strategic military systems, the regional arena, and the domestic arena—and to assess how the war has influenced Iran's national security concept. In addition, it includes a set of policy recommendations intended to block, or at least delay, Iran's efforts to rebuild its strategic capabilities, foremost among them the nuclear program, and the pro-Iranian axis in the region, and to reduce as much as possible the risk of renewed fighting.

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