

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.¹⁷⁷ 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.¹⁷⁸

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

177 The X account of Avigdor Lieberman, October 3, 2025. <https://tinyurl.com/5c9d4hnk>

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.¹⁷⁹ 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

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.¹⁸⁰

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

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 fullproof) 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.