

In the Wake of “Roaring Lion”: Preliminary Insights, Hypotheses, and Dilemmas for Israel

Raz Zimmt | May 6, 2026

More than two months after the outbreak of Operation “Roaring Lion,” the Islamic Republic stands with significant vulnerabilities and a new leadership, yet it also has certain achievements to its credit. These include surviving a joint American-Israeli attack and exploiting levers of pressure created during the fighting, including attacks against the Gulf states and the closure of the Strait of Hormuz. While it is premature to assess the full implications of the war, the conclusion of which remains uncertain, prominent trajectories can already be identified across six key domains: the Iranian domestic arena; the nuclear program; the missile array; the regional proxy network; Iran’s standing in the regional order; and Iran’s position in the global arena. Insights in these contexts are intended to serve as a foundation for analyzing subsequent developments in the coming months, once the “dust of war” settles and its long-term implications become evident.

At present, the current status quo (“neither war nor peace”), characterized by the closure of the Strait of Hormuz alongside an American naval blockade, remains unstable. It is doubtful whether such a state can be sustained over time. For Israel, this reality implies that Iran continues to maintain its nuclear capabilities while rehabilitating its missile array. This increases the risk of a “breakout” toward nuclear weapons and the resumption of hostilities under more difficult conditions. Against this backdrop, Israel faces a fundamental question: Should it continue to strive for a resolution to the Iranian problem through a decisive victory—the achievability of which is highly questionable, particularly without active U.S. participation? Or should it adopt a policy of

"conflict management" through intermittent enforcement, until a political shift occurs within Iran?

For the time being, it is clear that the war has not resolved the Iranian challenge: Iran has been damaged, but not defeated. Moreover, its ability to survive a combined American-Israeli offensive may even bolster its sense of efficacy and its perception of victory, thereby complicating future efforts to generate effective pressure against it with the aim of decisive defeat.

On the domestic front, the coming months will likely reveal whether the war has curbed (even if only temporarily) the regime's process of decline, leading to the emergence of a new, more hardline leadership, or if it has instead accelerated internal processes that could ultimately lead to revolutionary political change. Accordingly, Israel will be required to reassess the feasibility of regime change in Iran and to deepen its understanding of the new Iranian leadership's characteristics and their broader implications.

Regarding the nuclear issue, any potential arrangement with the United States (should one be reached) will force Israel to decide whether to acquiesce to it and how to maintain its clandestine enforcement and disruption capabilities. In relation to the missile array, and in light of Iranian reconstitution efforts, Israel must redefine whether this threat necessitates military action. It must also establish the "red lines" whose crossing by Iran would mandate such action, based on the severity of the threat in both quantitative and qualitative terms, particularly given the possibility of constraints on Israel's freedom of action imposed by the United States.

In the regional arena, Israel will be required to continually examine methods to diminish and thwart Iranian efforts to assist its proxy network, foremost among them Hezbollah, while integrating military enforcement with diplomatic arrangements. Concurrently, it must evaluate how to mitigate the risks inherent in the renewed rapprochement between the Gulf states and Iran, while leveraging the war's impact on these nations to expand cooperation and deepen the "Abraham Accords."

In the global arena, the intensifying cooperation between Iran, Russia, and China necessitates an update of Israeli policy to minimize the risks of Iran rehabilitating its strategic military arrays and defense industries with their assistance. Alongside this, a coordinated strategy toward Iran must be formulated in conjunction with the United States, while considering the erosion of Israel's international standing.

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It is difficult to overstate the significance of Operation Roaring Lion for the Islamic Republic. Approximately eight months after the Israeli-American offensive, conducted under Rising Lion in June 2025, and only two months after the brutal suppression of the most severe wave of protests to hit Iran in recent years, the Islamic Republic faced another seismic event. Its outcomes are expected to impact the regime, the region, and the global system for years to come.

Operation [Rising Lion](#) of June 2025 represented the first full-scale direct confrontation between Israel and Iran. It was perceived as a particularly dramatic event within Iran, primarily due to the Israeli opening strike, the United States' entry into the campaign, and the extensive damage inflicted on Iranian nuclear and missile arrays. However, its short duration and relatively limited scope, coupled with the fact that it was primarily designed to degrade Iran's nuclear and missile capabilities, rendered it, to some extent, a "dress rehearsal" for Roaring Lion.

Although senior figures in Tehran's political and military establishment presented the outcome of the 12-day war as an achievement, and even a victory—emphasizing Iran's ability to recover quickly, conduct a simultaneous campaign against Israel and the U.S., inflict heavy damage on Israel, and ensure regime survival—Iranian leadership nonetheless acknowledged the gaps and vulnerabilities that were exposed. Consequently, immediately following the war, it initiated a process of drawing lessons and a systematic effort to remedy deficiencies in its deterrence and defense capabilities. Some of the results of this process were manifested during Roaring Lion.

Operation Roaring Lion has left Iran with a new leadership and significant vulnerabilities, but also with certain achievements. Beyond merely surviving an American-Israeli offensive, the regime demonstrated an ability to leverage pressure points created during the conflict, including attacks against Gulf states and the closure of the Strait of Hormuz, to obtain security and economic guarantees for the post-war period. As was the case following Operation Rising Lion, and to an even greater extent now, the leadership in Tehran is expected to continue drawing lessons and fundamentally re-evaluate its strategic assumptions in light of the campaign's outcomes.

The New Iranian Leadership

The assassination of Ali Khamenei marked Iran's entry into a new phase, which may be defined as the "[Third Islamic Republic](#)." (This follows the First Republic, spanning from the 1979 Islamic Revolution until the death of the revolution's founder, Ayatollah Ruhollah Khomeini; and the Second Republic, led by Khamenei from 1989 until his death during the opening strike of Roaring Lion on February 28, 2026). The Third Islamic Republic may be characterized by a transition—potentially gradual—toward an alternative governance model with military-authoritarian features. At the center of this model stands the pronounced dominance of the Islamic Revolutionary Guard Corps (IRGC) within the upper echelons of leadership in Tehran, although the strengthening of the organization had already taken place under Khamenei the elder.

At this stage, there is no evidence to suggest that the Iranian regime is nearing collapse, despite the significant internal challenges it faces, which were severely exacerbated during the war. On the contrary, notwithstanding the blows it sustained, the regime—now under even more hardline leadership—managed to maintain its command-and-control capabilities until the ceasefire. Furthermore, there are no discernible cracks or fissures within the political elite, particularly in the apparatuses of repression and enforcement, led by the IRGC, the Basij, and the law enforcement forces. Although toppling the regime was not presented as one of the war's

objectives, the conditions that would enable the Iranian people to bring about the desired change have yet to mature.

In the aftermath of the war, an assessment will be required of three core issues regarding the internal dynamics at the highest levels of the Tehran regime. The anticipated developments concerning these three issues will significantly influence the policy adopted by the new leadership, which may oscillate between two poles: ideological hardening accompanied by a willingness to take risks and escalate, or a survivalist pragmatism that could lead to a readiness for compromise and restraint.

First is the status of Mojtaba Khamenei. It is premature to assess whether the new leader will be able to accumulate sufficient power to establish political autonomy and solidify his standing as Supreme Leader, particularly in light of his health condition, which remains unclear. At this stage, one can, at the very least, doubt his ability to exercise his authority effectively. Alternatively, he may become an instrument in the hands of the IRGC, who likely played a pivotal role in the Assembly of Experts' decision to appoint him as leader, in order to facilitate their control over the Islamic Republic. It is not inconceivable that, following the war, criticism which may have been suppressed until now may surface regarding Mojtaba's qualifications to succeed his father, given that his appointment represents a departure from the fundamental tenets of the Islamic Republic regarding [hereditary succession](#). This is particularly relevant in light of reports concerning his father's [alleged opposition](#) to his appointment as successor.

Second is the standing of the Islamic Revolutionary Guard Corps (IRGC). In recent decades, [the IRGC has evolved](#) into a central power center, not only within the security-military sphere but also throughout the political and economic systems. It can be assessed that the organization will strive to assert its authority over the political echelon, even if while maintaining the institution of the Supreme Leader for purposes of legitimacy. As the IRGC transforms into the dominant factor in the decision-making process, it is not inconceivable that disagreements, fissures, and internal power struggles will surface within the organization's senior ranks, as the organization is not considered a monolithic entity.

Third is the interplay between the various centers of power. These include the Office of the Leader, which has likely undergone significant transformations following the death of Khamenei the elder; the IRGC; Majlis Speaker Mohammad Bagher Ghalibaf, whose standing strengthened considerably during the war; President Masoud Pezeshkian; and the Supreme National Security Council. It is not inconceivable that the significant shifts within the political leadership will eventually necessitate constitutional revisions to redefine the relationships between these political centers of power, for instance, between the Supreme Leader and the President.

The political system of the Islamic Republic has always been characterized by disagreements between different centers of power, as well as among political and ideological factions (conservatives versus reformists; hardliners versus pragmatists). However, in the absence of a decisive authority such as Ali Khamenei, who was able to serve as a mediator, arbiter, and final

decision-maker, internal disputes may, over time, undermine not only the Iranian leadership's ability to make decisions effectively but also its internal cohesion.

State-Society Relations

Operation Roaring Lion broke out in close proximity to the most significant wave of protests to hit Iran since the Islamic Revolution, and against the backdrop of the Islamic Republic's ongoing decline. The regime faces a deep and persistent legitimacy crisis, stemming from a widening gap between the leadership and the public, particularly the younger generation, alongside an intensifying economic crisis and water and electricity shortages.

During the war—as was the case during the 12-day war—voices were heard in Iran expressing reservations regarding the intentions of the United States and Israel. Some even adopted the official narrative that this was a war against the Iranian state rather than against the Islamic Republic. A series of actions provoked strong reactions within Iran: continuous strikes on national infrastructure, universities, and pharmaceutical industries; and reports of efforts by Israel and the United States to encourage subversive activities among ethno-linguistic minorities, primarily the Kurds. These reports were perceived as a direct attempt to undermine Iran's territorial integrity. Furthermore, President Trump's threat to "return Iran to the Stone Age" served to galvanize the public. These events resonated not only among opponents or critics of the regime, but also emerged as a widespread expression of national and patriotic sentiment.

Nevertheless, the fundamental problems facing Iran have worsened, and it is highly doubtful whether the new leadership in Tehran possesses solutions to these deepening hardships. Consequently, even if there is currently no evidence of an immediate and significant challenge to the regime's stability, the coming months are expected to serve as a test of public attitudes toward the Islamic Republic and its new leadership, as well as the potential for a resurgence of popular protest. Among other factors, the regime's ability to provide a response to the intensifying economic crisis will be put to the test.

Initial estimates published in Iran indicate war damages amounting to at least [\\$270 billion](#). At the same time, Iran may derive economic benefit from potential concessions within the framework of an arrangement with the United States. The lifting of sanctions and the unfreezing of Iranian assets held in foreign banks are not necessarily expected to dramatically improve Iran's economic condition, which also stems from structural problems including mismanagement, corruption, and the extensive control of the IRGC over the economy. Nevertheless, such measures may enhance the regime's capacity to cope with the challenges of post-war reconstruction.

In any event, even if popular protests resume following the war, this will not necessarily be sufficient to bring about the desired political change. A tangible threat to the regime's survival depends not only on millions of Iranians taking to the streets and their ability to forge a broad, nationwide, and cross-sectoral social coalition. It also depends on a shift in the balance of power between the regime, which still possesses effective instruments of repression and loyal

security apparatuses, and its opponents, who still lack the capacity to translate widespread public discontent and mistrust of the regime into an organized and viable political alternative.

The Nuclear Program

The Iranian nuclear program continues to constitute a primary target for Israel, even in the aftermath of Operations Rising Lion and Roaring Lion. Whether or not a detailed agreement is reached between Iran and the United States following the war, one that includes restrictions on the nuclear program, the Iranian leadership will be required to re-evaluate its nuclear doctrine. Despite the damage inflicted on nuclear capabilities (primarily during the 12-day war), Iran retains residual capabilities that could serve its efforts to rehabilitate the program and even to achieve a nuclear weapons breakout. These include: a stockpile of approximately 440 kilograms of uranium enriched to 60 percent, which it possessed prior to the war in June; significant additional quantities of uranium enriched to lower levels; at least several hundred advanced centrifuges; as well as knowledge, scientific personnel, enrichment infrastructure, and potential capabilities for conversion to metallic uranium and its processing.

The enrichment of uranium to a military grade of 90 percent, its conversion into uranium metal, and the production of a nuclear explosive device would not, in and of themselves, grant Iran a full operational military nuclear capability. Such a capability also depends on the ability to integrate a nuclear warhead onto ballistic missiles. However, should Iran decide to pursue a nuclear weapons breakout, it could, within a relatively short period, achieve the capability to detonate a simple device (even if unsuitable for mounting on a missile) and conduct an underground test, thereby signaling that it has crossed the nuclear threshold.

Enrichment to the 90 percent level does not necessarily require numerous cascades and could be achieved within a few weeks, particularly if Iran were to implement an accelerated emergency program and if a covert facility or several small, dispersed sites across the country have already been prepared in advance. Iran could also carry out reconversion to metallic uranium at alternative sites, such as university chemistry laboratories or chemical plants. If this process is conducted clandestinely and without full adherence to safety protocols, it could take, at most, several months.

It may be assessed that Iranian motivation to advance toward nuclear weapons is likely to intensify in light of Tehran's ongoing failure to deter its enemies from attacking through conventional means or via its regional proxies. In this sense, the war may actually reinforce the strategic logic behind the pursuit of nuclear weapons—whether as a guarantee for regime survival or as a deterrent against future strikes. Reports regarding [Iran's refusal](#) to discuss the nuclear issue within the framework of negotiations with the United States may further strengthen the assessment that the leadership in Tehran views the preservation of nuclear capabilities as a vital means for a future nuclear weapons breakout.

Therefore, if a solution is not found to remove critical nuclear components from the country or to destroy them, the regime, led by Mojtaba and the IRGC, who are not necessarily committed to the concept of a nuclear threshold state, may decide to shift its nuclear doctrine and pursue a breakout. The Iranian analyst Mostafa Najafi, considered close to regime circles and the IRGC,

voiced this perspective by recently [arguing](#) that a state cannot achieve nuclear deterrence without the actual possession of nuclear weapons. Consequently, remaining in a nuclear threshold state—without producing weapons—fails to create deterrence and may even increase security threats, placing the country at risk of military attack.

Although voices are also heard within Iran casting doubt on the ability of a military nuclear option to ensure the survival of the Islamic Republic, or arguing that there is no need for nuclear weapons given the regime's capacity to effectively threaten its enemies through conventional capabilities (including missiles, UAVs, and control over the Strait of Hormuz), it is necessary to adopt a stringent working assumption: that the Iranian leadership will pursue nuclear weapons if it concludes that the prospects for achieving this objective outweigh the associated risks.

Alongside the question of motivation, the Iranian leadership will be required to take into account the balance of risks involved in a decision to pursue a nuclear breakout; the residual nuclear capabilities remaining at its disposal, including the quantity of uranium enriched to various levels, the number and types of centrifuges, and enrichment infrastructure; as well as the nature of the oversight of nuclear facilities by the International Atomic Energy Agency (IAEA).

The Missile Array

Since the conclusion of Operation Rising Lion, Iran has intensified its efforts to reconstitute and upgrade its missile array as part of enhanced preparations for the potential resumption of hostilities. In its view, the war demonstrated that the missile array constitutes a primary strategic asset, providing it with an effective response capability. Furthermore, missiles allow Iran to attrit Israel and limit its ability to conduct a prolonged campaign, due in part to the constraints of the Israeli interception system. Operation Roaring Lion further highlighted the damage potential inherent in Iran's missile and UAV capabilities, not only toward Israel but also toward its neighbors, particularly the Gulf states.

During Roaring Lion, a more systematic effort was made to target not only launching capabilities but also production chains and the Iranian defense industries, with the goal of delaying the array's rehabilitation following the campaign. Despite this, significant missile and launcher capabilities remained in Iran's possession at the war's end. Furthermore, it can be assessed that, notwithstanding the substantial damage to production infrastructure, Iran possesses the capacity to regroup its missile array, which will continue to serve as a central component of its deterrence and its ability to respond to any future attack.

Even during the war, Iran managed not only to continue launches but also to [rapidly restore](#) damaged underground bunkers, launch facilities, and missile warehouses. In mid-April 2026, the IDF [estimated](#) that if the missile issue is not regulated within the framework of an agreement between Iran and the United States, Iran could—should it choose to invest the necessary resources—re-accumulate thousands of ballistic missiles within a few years. These rehabilitation efforts [commenced](#) immediately upon the ceasefire taking effect.

Another issue requiring examination concerns the process of drawing lessons in Iran regarding the combat doctrine of the missile array. Following Operation Rising Lion, Iran worked not only to increase the rate of production and improve missile accuracy, but also to enhance the survivability of the launchers and the missiles themselves. This was achieved, among other measures, by pre-storing them in [vast storage tunnels](#) constructed over the years. Additionally, the Iranians developed methods for clearing blockages at tunnel exits, including the use of [bulldozers](#).

In parallel, extensive use was made of cluster munitions, designed to challenge Israel's interception capabilities. Another lesson implemented following the 12-day war was the adoption of the "[Decentralized Mosaic Defense](#)" concept. In accordance with this strategy, intended to counter potential strikes on the command-and-control chain, the IRGC was divided into 31 regional commands corresponding to the country's provincial divisions, each operating in a decentralized manner. Regional commanders were granted authority to employ fire, including the launching of missiles and UAVs, without requiring approval from the senior echelon. While [this concept](#) is not without risks, such as a potential loss of control by the central command and an increased risk of uncontrolled escalation due to autonomous actions by local commanders, it allowed the missile array to continue operating even in the early stages of the campaign, when Israel and the United States succeeded in temporarily disrupting the command-and-control chain.

The "Axis of Resistance"

Hezbollah's joining the campaign alongside Iran—and to a lesser extent, the pro-Iranian Shiite militias in Iraq and the Houthis in Yemen—has sparked a renewed debate regarding the effectiveness of the pro-Iranian regional axis (the "Axis of Resistance") as a component of Iranian deterrence. The mobilization of its regional proxies alongside Iran was perceived in Tehran as an expression of axis-wide commitment.

This stands in contrast to the 12-day war, which illustrated the weakening of the Shiite axis in light of regional developments occurring since October 7, 2023, chief among them the weakening of Hamas, the significant damage to Hezbollah's capabilities during the campaign against Israel in the summer of 2024, and the collapse of the Assad regime in December 2024. These developments posed a severe threat to the central regional project that Iran had cultivated for years, and largely deprived it of the ability to deter Israel or respond in the event of an attack on its nuclear facilities. Indeed, the failure of the proxies, particularly Hezbollah, to join the campaign in June 2025 heightened doubts in Tehran regarding the efficacy of the proxy concept, even as Iran continued its efforts to assist them and rehabilitate their capabilities. Furthermore, Iran deepened its direct involvement in managing Hezbollah's affairs, as evidenced by the deployment of [dozens of IRGC officers](#) who were involved in the organization's rehabilitation and re-armament process.

The joining of the proxies in the campaign in March 2026 following the assassination of Khamenei and their growing concern regarding the possible collapse of the regime in Tehran prompted a wave of statements by senior Iranian officials. They emphasized the importance of

the "Axis of Resistance" to Tehran and even presented it as an expression of Iran's ability to sustain the concept of "The Unification of Arenas" against Israel.

For instance, in his first message to the Iranian people immediately after his selection as Leader, Mojtaba Khamenei [emphasized](#) that Iran views the front as an inseparable part of the values of the Islamic Revolution. The Commander of the IRGC Quds Force, Esmail Qaani, also [stressed](#) the importance of the front, declaring that it is now clear that the "Axis of Resistance" possesses highly valuable capabilities and that the "Unification of Arenas" constitutes a source of strength for the Islamic Nation and a nightmare for "Global Arrogance [the West] and International Zionism." Western analysts also [pointed to](#) the entry of the pro-Iranian axis components into the war as an expression of the "Resurgence of the Axis of Resistance."

It can be assessed that the new Iranian leadership—perhaps even more than its predecessor, due to the dominance of the IRGC in decision-making processes—remains committed both ideologically and strategically to the continued existence of the "Axis of Resistance" and to supporting the regional proxy network. Therefore, it is doubtful whether Iran will abandon its ambition to rehabilitate the Axis.

However, a re-evaluation of Tehran's proxy strategy will necessitate addressing several key considerations. First, the changing circumstances in the Middle East, such as the situation in Lebanon following the arrangement between the Lebanese government and Israel; continued efforts by Israel, and perhaps the Lebanese Armed Forces, to expand enforcement against Hezbollah's re-armament; limitations imposed by the Lebanese government on Iranian activity within its territory, specifically regarding the presence of IRGC officers; and the continued commitment of the Syrian regime to restrict the transfer of weaponry from Iran to Lebanon via Syria. Second, Iran's ability to continue investing billions of dollars in rehabilitating the Axis's capabilities and supporting its regional allies, given its economic situation and national priorities after the war. Third, the cost-effectiveness of sustained investment in proxies compared to investing in Iran's other central deterrent components, primarily the missile and nuclear programs. This is especially relevant given that even the proxies' entry into the campaign did not alter the strategic calculations of Israel and the United States, nor did it deter them from continuing the campaign against Iran. It did, however, limit Israel's freedom of action to some extent, particularly regarding the ability to deploy the full capabilities of the Air Force in Lebanon.

The Regional Order

Iran's ability to launch fire-based attacks using missiles and UAVs against the Gulf states, including strikes on energy and critical infrastructure, as well as its capacity to disrupt freedom of navigation in the Strait of Hormuz, demonstrated that the damage it sustained did not deprive it of the effectiveness of its primary regional levers of pressure in the region. Iran identified its asymmetric military capabilities and its control over the Strait of Hormuz as leverage against the United States to shorten the duration of the campaign. Furthermore, the sense of achievement in Tehran reinforced its desire to utilize these levers not only for the sake

of survival, but also to establish a new regional order following the war, one that acknowledges its status and power.

The two military campaigns against Iran, in 2025 and 2026, found the country and its Arab neighbors (which are not a monolith) against the backdrop of a détente trend between Tehran and the Sunni-Arab states, led by the Gulf countries. This trend is closely linked to their apprehension regarding Iran, particularly since the September 2019 attack on Saudi oil facilities, which demonstrated Iran's military advantage; the growing doubt concerning the United States' security commitment to its allies; and the shifting focus within the Gulf states toward domestic affairs, economic rehabilitation, and long-term development.

Iran's attacks against the Gulf states during the war will necessitate a re-evaluation of the relationship between them. [The Gulf states](#) will be required to examine their policy toward Iran based on their recognition of its regional standing and its ability to harm them—both in terms of military strikes and the disruption of their export capabilities. This assessment must also account for the limitations of the American security guarantee; the difficulty in restraining Iran within the Persian Gulf and beyond, especially in light of the Gulf states' limited capacity for independent security reliance; and the failure of efforts, at least for the time being, to bring about political change in Iran.

Regarding the issue of Hormuz, Iran also succeeded in achieving one of its primary objectives during the war. Tehran's decision to close the straits selectively allowed it not only to influence the global energy market but also to exploit the war as an opportunity to transform its control over Hormuz into a significant political and economic asset. Its reliance on global economic levers enables Tehran to expand its sphere of influence and deterrence beyond its direct enemies to the global economy itself. Majlis member Mohammad-Taqi Naqdali gave voice to this perspective, recently [declaring](#) that the Strait of Hormuz constitutes a key component of Iran's bargaining power and that, in this respect, its importance exceeds that of a nuclear bomb.

Iran, which has already begun collecting protection fees from ships that received its authorization to pass through the straits, has effectively turned maritime traffic into a political filter through which it can punish or reward foreign nations. Iran's First Vice President, Mohammad Reza Aref, accurately described this situation when he [stated](#) that Iran's enemies sought to bring about "regime change" in Tehran, but in practice led to a "regime change" in Hormuz. Even if Iran is unable to maintain its "protection fee regime" in the straits over the long term, its future capability to harm regional states and the global economy by closing them cannot be ignored, unless effective alternatives for maritime transit in the Strait of Hormuz are found in the future.

Iran in the Global System

In Tehran's view, the war once again demonstrated the importance of [Russia](#) and [China](#) to its interests, alongside the inherent limitations of their partnership. During [Operation Rising Lion](#), the Iranian-Russian-Chinese partnership which has deepened and expanded in recent years against the backdrop of global developments—primarily the war in Ukraine and the growing tension between China and the United States—was put to the test. The conduct of Moscow and

Beijing, which sufficed with relatively tepid condemnations of the strikes on Iran, sparked criticism and disappointment in Tehran and reinforced the assessment that Iran's ability to rely on Russia and China remains limited, particularly in the scenario of a military confrontation with Israel and the United States. Nevertheless, it was clear to the Iranian leadership that, at present, Iran has no viable alternative to maintaining its political, economic, and security partnership, limited as it may be, with Russia and China, especially in light of the deterioration of its relations with European countries.

During Operation Roaring Lion, several reports were published regarding Russian and Chinese assistance to Iran, which included, among other things: the transfer of [Russian](#) and [Chinese](#) intelligence on the locations of American forces in the Middle East and their regional allies, including Israel; Russian assistance in [UAV technology](#), including the transfer of upgraded components for Shahed-type drones (which are of Iranian origin); the Chinese transfer of [components for missile production](#), including sodium perchlorate, which is used to produce solid fuel for rocket motors; and the possibility of supplying advanced Chinese [air defense systems](#) to Iran.

In the Russian context, this assistance to Iran can be seen as the relationship "coming full circle." Since the Russian invasion of Ukraine, the relationship between Moscow and Tehran had been characterized by a greater degree of symmetry, given the Iranian assistance to Moscow in supplying UAVs. However, it appears that the relationship between the two countries is once again characterized by asymmetry, namely a growing Iranian dependence on Russia compared to Russian dependence on Iran.

In light of Iran's ambition to rehabilitate its strategic military arrays, chief among them the missile and air defense systems, alongside continued tension with Western nations and the strengthening influence of the IRGC within the senior leadership, it can be assessed that the "Look East" policy adopted by the Islamic Republic in recent years will ensue and even deepen. This remains subject to the willingness of Russia and China to continue to expand their strategic cooperation with Tehran, based on the exploitation of Iran's need to rebuild its military and industrial capabilities, while simultaneously seeking to avoid steps that could lead to an escalation in their own relations with Washington and Jerusalem.

Dilemmas for Israel: Between Resolving the Iranian Problem and Ongoing Management

Ultimately, Iran stands at the threshold of a new era, necessitating a re-evaluation of its fundamental assumptions, strategic concepts, and policies across the domestic, regional, and global arenas. The combination of a new leadership, the lessons of the war, changing regional circumstances, and the dynamics of relations between the global powers—all of these are expected to influence this process in the coming months and beyond.

The consequences of the war also require Israel to re-examine its policy toward Iran. It is clear that the war has not resolved the Iranian challenge: Iran emerges from the campaign damaged but not defeated. Furthermore, the apparent success of the Islamic Republic in surviving a joint American-Israeli attack—unprecedented in its scope—is likely to strengthen Tehran's sense of

capability and its perception of victory. These factors will make it more difficult in the future to apply effective pressure against Iran for the purpose of achieving a decisive resolution.

Against this backdrop, Israel faces a fundamental question: whether it should continue striving to resolve the Iranian problem through decisive defeat, an outcome that is highly doubtful (especially without active U.S. participation), or adopt a policy of “conflict management,” combining intermittent enforcement until there is a shift in Iran's political circumstances?

On the domestic front, the coming months will likely reveal whether the war halted (if only temporarily) the process of the Islamic Republic's decline—as reflected in the wave of protests in December 2025–January 2026—leading to the rise of a new, more extremist and determined leadership, or if it actually accelerated internal processes of change.

Accordingly, Israel will be required to re-evaluate the feasibility of regime change in Iran and its own ability to encourage these processes using diplomatic, economic, cognitive, and intelligence tools. Furthermore, Israel must deepen its understanding of the distinctive characteristics of the new Iranian leadership, including the dominance of the IRGC, while recognizing its personal and institutional complexity.

Regarding the nuclear program, the details of any arrangement between Iran and the United States—should one be reached—will force Israel to decide whether to accept the emerging agreement, depending on its terms. It will also need to determine how to maintain enforcement and intervention capabilities, including the preservation and development of clandestine sabotage capabilities. The goal would be to disrupt any Iranian attempt to covertly advance toward a nuclear weapon and to deter Tehran from a “breakout” to a weapon. Furthermore, Israel will be required to re-evaluate the advantages and disadvantages of a diplomatic settlement on the nuclear issue. This assessment should take into account its potential impact on the prospects for political change in Iran—for example, through economic relief that might provide the regime in Tehran with a “lifeline,” at least in the short term.

In the context of the missile array, and in light of Iran's expected rehabilitation efforts, Israel will be required to re-evaluate whether Iranian force build-up in the field of ballistic missiles indeed justifies military or clandestine action. If so, it must define the “red lines” whose crossing by Iran would mandate such action based on the severity of the threat—both quantitatively (the number of missiles and launchers, and production rate) and qualitatively (missile types, precision capabilities). This assessment must be weighed against the IDF's interception capabilities and the extensive consequences of a prolonged military campaign against Iran, including the impact on Israel's economy, society, and foreign relations. In this regard, Israel must consider that the erosion of its standing in the United States may limit its future freedom of action against Iran.

In the regional arena, Israel will be required to continue examining ways to diminish and thwart Iranian assistance to its regional proxy network, with the goal of rehabilitating the pro-Iranian axis, foremost among them Hezbollah, and preventing the organization of offensive maneuvers by any components of that axis. In this context, it will need to examine how to combine military enforcement and prevention activity with processes of diplomatic arrangement and de-

escalation in the region, in order to shape a regional reality that reduces Iran's ability to support armed non-state actors while exploiting crises to deepen its influence. In addition, Israel will need to evaluate how to mitigate the risks involved in the renewed rapprochement between the Gulf states and Iran, while leveraging the consequences of the war to expand cooperation with these states and deepen the 'Abraham Accords.' This must be done against the backdrop of the growing apprehension among these nations toward the Islamic Republic, alongside an expanding perception of Israel as a factor undermining regional stability.

In the global arena, the evidence of tightening military and intelligence cooperation between Iran, Russia, and China will require Israel to formulate an updated policy to mitigate the risks associated with the rehabilitation of Iran's strategic military arrays and defense industries through their assistance. Concurrently, Israel must develop a joint strategy with the United States toward Iran. This strategy should take into account the dangerous erosion of Israel's diplomatic standing in the United States. This trend could worsen further if Israel is perceived as urging the American administration to prolong the current conflict indefinitely. It should also consider the expected political developments there, as well as the strengthening narrative that Israel is drawing the United States into military confrontations based on contested assumptions.

In any event, the current status quo ("neither war nor peace"), which involves Iran's continued closure of the Strait of Hormuz alongside a naval blockade by the United States, is characterized by instability; it is doubtful whether it can be sustained for long, especially as the economic price for Iran, the United States, the global economy, and the Gulf states continues to soar. At this stage, both the United States and Iran appear to believe that the other side will be unable to continue bearing the costs of the current situation for long, and are therefore presenting rigid positions. For Israel, however, this means that Iran continues to preserve its nuclear capabilities and rehabilitate its missile array, increasing the risk of an Iranian decision to break out toward nuclear weapons, as well as the risks associated with renewed hostilities.