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# Shattered Status Quo: Iranian Resilience and the Limits of U.S. Strategy

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**ABSTRACT** *The nearly 50-year-long tension between the United States and Iran has culminated in a broad, high-intensity conflict. The visible dynamics that have escalated this tension into a kinetic confrontation include Iran's nuclear and missile programs, as well as its ties to proxy groups. Nonetheless, many analysts argue that the war has been triggered and propelled by Israel's manipulation and provocation. Iran's resilient response calls into question the strategic calculations of one of the largest and most lethal military mobilizations. This study examines the actions of the warring parties, their tactical and strategic calculations, and their intended objectives, while also assessing the likely outcome of the conflict. The analysis contends that, despite achieving certain short-term tactical gains, the U.S.-Israeli side has failed to establish a coherent strategic plan or attain its political objectives. Observations indicate that miscalculations by the U.S. and Israel have propagated costs across the entire region. Finally, the study emphasizes that the regional balance and dynamics will not remain unchanged after this war, especially considering the profound transformative potential accompanying the transition of Iran's supreme leader.*

**Keywords:** Iran, Khamenei, Trump, Israel, Nuclear

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## Introduction

**O**n the morning of February 28, 2026, the U.S. and Israel launched an intensive military strike against Iran. In this operation, named Epic Fury by the U.S., critical military facilities and command-and-control centers across major cities, including Tehran, were targeted. At the time of writing, Iranian casualties were estimated at around 1,300 civilians, while the U.S. had lost eight personnel. However, the military outcomes and casualty figures only provide a partial picture, making it difficult to reach meaningful conclusions solely from these metrics. The political objectives of the war and its economic fallout present a different, arguably more consequential, dimension. These are the aspects on which this commentary focuses, while the processes that brought the parties to war and the underlying dynamics are intentionally left outside its scope.

The commentary addresses questions such as the extent to which the U.S.-Israeli strikes reflect a particular conception of Iran, how effectively they achieved their intended outcomes, and which variables were most influential in this context. Additionally, it considers the new order that awaits Iran and the broader Middle East in the aftermath of the conflict. The current events are unprecedented in history: For the first time, a head of state and a Shia Marja' al-taqlid were specifically targeted and killed in a U.S.-Israeli attack. Likewise, for the first time, all Gulf Arab

monarchies simultaneously became targets of Iran. The alliance balances, security architecture, and distribution of power –both economic and political– across the Middle East are now beginning to shift.

From this point forward, the Middle East will no longer be the region we once knew. Regardless of who prevails or how the war ultimately concludes, we are entering a period in which international law and fundamental humanitarian principles have lost their conventional meaning, and traditional diplomatic and international relations frameworks have become largely invalid. Establishing a new order will first require the construction of a coherent set of values. Given that the conflict has shattered all familiar patterns in the Middle East, this will be an extraordinarily challenging endeavor.

## U.S. Strategy against Iran: Tactical Success, Strategic Void

There is no clear consensus regarding the initial reasons for U.S. involvement in this conflict. American politicians, including President Trump, have offered differing explanations, which have prompted the public to question the rationale for entering the war. According to a *Reuters/Ipsos* survey conducted between February 28 and March 1, public support for the conflict among Americans was measured at 27 percent.<sup>1</sup> Although this figure rose to 41 percent in subsequent days, it remains the lowest level of public backing for a U.S. mil-

itary intervention compared to previous conflicts, including World War II, the Iraq and Afghanistan invasions, and the Libya intervention.<sup>2</sup>

Trump justified the strike by claiming that Iran was preparing an attack against the U.S.<sup>3</sup> Secretary of State Marco Rubio, on the other hand, stated that they believed Israel would strike Iran and that Iran would, in turn, retaliate against the U.S., and that Washington therefore acted preemptively to prevent this outcome. Rubio's statement<sup>4</sup> clearly suggested that the United States was being drawn into the conflict by Israel. Subsequently, Trump felt the need to clarify Rubio's remarks, emphasizing that the strike on Iran was not related to Israel and that it represented an independent decision by the U.S. According to Trump, had the U.S. not struck first, Iran would have attacked America.<sup>5</sup>

Following the outbreak of hostilities, Pentagon officials revealed<sup>6</sup> in briefings to members of Congress that there was no imminent Iranian threat, directly contradicting the assertions made by the U.S. President. This dissonance among senior U.S. actors and institutions has reinforced the widespread perception that the war is Israel's, rather than America's. Iranian Foreign Minister Araghchi also stated on social media that Iran had no intention of attacking the U.S., describing such claims as "a sheer and utter lie."<sup>7</sup>

In addition to the contradictory justifications for the war, divergent po-

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sitions within the Trump Administration have also been notable. Vice President JD Vance was known for his cautious stance toward military engagement with Iran. Although he expressed support for Trump's decision after hostilities commenced, he had maintained a more reserved approach prior to the conflict, and his support during the war was not particularly visible. Consequently, Trump described him as "philosophically a little bit different than me" and noted, "I think he was maybe less enthusiastic about going [to war]."<sup>8</sup> Meanwhile, former Republican Congresswoman Marjorie Taylor Greene, known for her criticisms of Israel, publicly called on Vance and Tulsi Gabbard to disclose their true views on the Iran conflict.<sup>9</sup> While this intra-administration division may not have exerted direct pressure on Trump, it has nonetheless hindered the appearance of unity.

Beyond the justifications and tactical phases of the war, it is essential to define the strategic objectives, both military and political, and the exit strategies. Despite the U.S. deploying one of the largest military buildups in history to the Gulf over several weeks, a clear picture of its strategic goals has

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yet to emerge. Trump has repeatedly shifted his stated objectives and expectations regarding Iran. While he initially spoke of regime change,<sup>10</sup> Defense Secretary Pete Hegseth explicitly denied any intention to pursue regime change, asserting that the purpose of the war was solely to incapacitate Iran's military infrastructure.<sup>11</sup> The lack of clarity regarding strategic goals has consequently left the direction of U.S. military operations and the formulation of an exit strategy in a state of uncertainty.

The U.S.-Israeli coalition initially achieved tactical success in the conflict. Leveraging the advantage of surprise as the first-strike party, they secured early military gains. However, this shock factor gradually lost its effectiveness. Iran's resilience and counterattacks transformed the conflict into a sustained campaign of aerial strikes and pressure operations. When this approach also proved insufficient, the U.S.-Israeli forces shifted to targeting critical infrastructure. For example, the water desalination facility on Qeshm Island<sup>12</sup> and oil storage depots<sup>13</sup> in Tehran were struck. In response, Iran tar-

geted a water desalination facility in Bahrain,<sup>14</sup> signaling that it was capable of escalating further if necessary.

The popular uprising that Trump had anticipated did not materialize. Although options such as organizing an insurrection through armed Kurdish groups (including the PKK terrorist organization's Iran branch, the PJAK)<sup>15</sup> or deploying ground forces were occasionally considered, none had occurred at the time of writing. By the end of the second week of the conflict, Trump began suggesting that the war would soon conclude and that all objectives had been achieved,<sup>16</sup> seemingly in search of a rationale for withdrawal. However, given the discrepancy between his actions and statements, it would be premature to draw any definitive conclusions about the timing of the conflict's end.

### The Asymmetric Lever: Iran's Multi-Front Strategy to Externalize War Costs

Iran's military strategy has been fundamentally oriented toward directly responding to Israel and targeting the U.S. military presence in the region, particularly American bases. Notably, Iran appears to have entered this conflict better prepared than during the 12-Day War. This preparedness can likely be explained by Tehran's determination not to fall into the same trap it encountered mid-negotiations in the past, and by its decision not to base its investments solely on the hope of reaching an agreement through negotiations.



Iran's core military strategy has focused on striking the adversary through ballistic missiles and kamikaze drone attacks, partly to compensate for its own weak air defenses. The initial targets of these attacks have primarily been early warning and radar systems. By effectively "blinding" the enemy in this manner, Iran has sought to amplify the impact of its missile and drone operations. The success of these efforts and the damage inflicted on the U.S.-Israeli coalition have been acknowledged even in Israeli media reports.<sup>17</sup>

The U.S.-Israeli decapitation strategy has proven ineffective in Iran. The initial tactical victories and the shock effect at the outset of the conflict did not lead to the collapse of the regime. One of the main reasons for this resilience is Tehran's adoption of the "Mosaic Defense" strategy. Under

this approach, a decentralized defense system has been implemented, composed of separate security units, each making and executing its own military decisions. As a result, the system continues to function without collapsing. Foreign Minister Abbas Araghchi announced Tehran's shift to a mosaic defense strategy immediately after the outbreak of hostilities.<sup>18</sup>

Iran's targeting of U.S. military assets in the Gulf has inevitably generated a crisis between Iran and the Gulf states. While Iranian officials have emphasized<sup>19</sup> that they do not intend to violate the sovereignty of Gulf countries and are focusing solely on U.S. military positions, the regional response has been strong. Saudi Arabia, for example, described Iran's attacks as "blatant and cowardly."<sup>20</sup> Nevertheless, in the short term, it is unlikely that the Gulf states will launch

Hundreds of pro-Iranian demonstrators marched through San Francisco to protest against U.S. and Israeli strikes on Iran amid the ongoing conflict.

TAYFUN COŞKUN / AA

a direct military response against Iran. However, in the post-conflict period, they are expected to adopt more cautious policies toward Iran and to strengthen ties with multiple actors to balance Tehran's influence. The U.S. protective umbrella over the Gulf vis-à-vis Iran has proven ineffective, which will likely prompt a deep reassessment of Gulf-U.S. relations.

However, Iran's military responses cannot be understood solely as efforts to establish battlefield superiority or inflict damage on the adversary. Rather, Iran has organized its operations based on a logic of externalizing the costs of war. In this context, it has generated military activity aimed at disrupting tanker passages through the Strait of Hormuz, a route that is critically important for global energy supplies. Disruptions in this corridor have had immediate effects on oil and LNG prices. Approximately 80 percent of the world's oil and LNG passing through Hormuz is destined for Asian markets, with the remaining 20 percent going to Europe. According to 2025 statistics, some 20 million barrels of oil traversed this narrow waterway daily, accounting for roughly 25 percent of global seaborne oil trade, while 20 percent of global LNG exports also pass through the strait.<sup>21</sup> Following Iran's attacks, the price of a barrel of oil reached \$120, with consequent effects on gas prices, pricing across multiple related sectors, and inflation.<sup>22</sup>

Moreover, Iran's attacks targeting global financial and trade hubs such as Dubai have largely undermined

the city's role as a "safe haven" for financial activities and commerce. The damage to Dubai's image delivers a significant blow to the long-standing Gulf strategy of diversifying economic resources beyond oil and natural gas. Although the Dubai economy relies on approximately 75 percent of non-oil sectors,<sup>23</sup> it has become evident that geopolitical instability makes sustaining economic stability virtually impossible.

The disruption extends beyond regional economies, with dramatic declines also observed in global markets.<sup>24</sup> This overall picture reinforces the view that the war is economically unsustainable. Iran's strategy of externalizing the costs of the conflict has clearly proven effective. Should the conflict persist and evolve into a war of attrition, the U.S.-Israeli alliance is likely to emerge with substantial losses. Iran's economy has long operated under severe sanctions and has little room for additional damage. Nevertheless, a protracted attritional conflict would trigger a significant crisis in global economic balances.

On the other hand, the option for the U.S. Navy to ensure safe passage through the Gulf appears increasingly unfeasible. Despite Trump's high-profile statements, U.S. naval officials have indicated that they are unable to provide escort services for commercial vessels requesting protection.<sup>25</sup> By operationalizing its long-standing threat to close the Strait of Hormuz, Iran has disrupted the global economy, while the U.S., positioned as the guarantor of global economic secu-

city, has revealed both a lack of capacity and a coherent plan to respond. Consequently, Iran's strategy of externalizing the costs of war has proven effective on the ground, despite U.S. counter-arguments.

## The New Political Landscape of Iran

The assassination of Ali Khamenei represented the most striking development during the shock phase of the U.S.-Israeli strikes. Khamenei had served as the supreme leader for 37 years of the 47-year history of the Islamic Republic. Prior to that, he had held the Presidency for eight years, effectively exercising *de facto* leadership over the country for a total of 45 years. He held both the highest state office and the title of *Marja'at-taqlid* (the Source of Emulation), the supreme authority in the Shia clerical hierarchy. Consequently, his death inevitably produced significant political and religious reverberations.

The U.S.-Israeli coalition, through this strike, sought to execute a decapitation strategy aiming to dismantle the entire system by eliminating the supreme leader and key commanders. However, Iran's strong constitutional framework, along with pre-conflict political planning, prevented any leadership void or systemic collapse. By promptly activating the constitutional process, Iran ensured that no governance gap emerged.

Following Khamenei's death, a three-member Interim Presidential

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Council was immediately established based on Article 111 of the Constitution. The Council's *ex officio* members were President Masoud Pezeshkian and the Head of the Judiciary, Mohseni Ejei. A third member, to be selected by the Guardian Council from among candidates approved by the Expediency Discernment Council, was appointed as Ali Reza Arafati.<sup>26</sup> Activating the constitutional process was vital to prevent any appearance of chaos and to convey continuity and stability within the state. Any vacuum in authority could have undermined both elite cohesion and the relationship between the state and society, while also providing motivation for armed separatist groups operating within the country.

Of course, the establishment of the Interim Leadership Council cannot be viewed merely as a form of political signaling. During wartime, this Council functions as the executive authority of the country. Meanwhile, the Supreme National Security Council, chaired by Ali Larijani, continues to operate. Larijani has emerged as a particularly influential power broker

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during the conflict. Maintaining elite cohesion until the selection of the new supreme leader – a critical strategic threshold – was essential, and Larijani can be seen as having played an active role in this process.

On March 9, it was announced that the Assembly of Experts had selected Mojtaba Khamenei as the new supreme leader. Following the announcement, large crowds took to the streets to celebrate their new leader. Numerous actors, both domestic and international, extended their congratulations to Mojtaba. Of particular significance were the endorsements from domestic elites, as Mojtaba had long been considered a potential candidate for the supreme leadership position and was correspondingly controversial. His religious qualifications and administrative capacity had been subjects of debate, and he had not previously held a major executive role, unlike his father, who

served eight years as president prior to becoming Supreme Leader. In order to preempt internal debates and reinforce legitimacy, congratulations and pledges of allegiance from elites were crucial. Among those publicly congratulating Mojtaba Khamenei were the Secretary of the Supreme National Security Council, Ali Larijani,<sup>27</sup> and former President Hassan Rouhani.<sup>28</sup>

Following the selection of Mojtaba Khamenei as the new supreme leader, numerous questions arose regarding the future of Iran's domestic and foreign policy. How did the son, Mojtaba, compare to his father? Would he adopt a harder line stance? What direction would he take in foreign affairs? Would he pursue internal reforms? Answers to these questions remain largely elusive. Mojtaba is a relatively low-profile figure in the public sphere, with no known interviews in the media and no published works expressing his views on specific issues. Consequently, those who speak with certainty about Mojtaba's leadership are, in fact, engaging in speculation.

Debates over “the return of the monarchy,” which was abolished in 1979, remain among the most closely watched discussions. In particular, it can be argued that this debate will gain prominence in Iran's domestic politics, especially in shaping state-society relations and elite competition after the war. One of the founding principles of the revolution – opposition to monarchy – raises critical questions: Has this principle

been effectively erased from Iran's political memory and guiding norms with Mojtaba's selection? And how will Iranian political culture compensate for this potential loss?

One of the few known aspects of Mojtaba's background is that he studied under the conservative cleric Mohammad-Taqi Mesbah-Yazdi.<sup>29</sup> It is also widely acknowledged that he maintains close ties with the Islamic Revolutionary Guard Corps (IRGC), a factor that points to a hardline profile. Although some observers argue that Mojtaba's selection signals an increasing fusion between the security bureaucracy and political authority—suggesting that Iran is evolving into a form of militarized republic in which the IRGC's influence over governance has become formalized—such claims ultimately require cautious observation over time. What appears clear, however, is that if Mojtaba avoids becoming a direct target of Israel and remains in power, his tenure as supreme leader is likely to usher in a period of new debates and tensions within Iran. His selection has already added another layer to the discussions about the country's existing economic, social, and political challenges.

## How Will the War End?

As the conflict continues, various scenarios regarding its conclusion have emerged. Options such as a ceasefire or a comprehensive peace agreement are being considered, with multiple actors engaging to bring the hostili-

ties to an end. Russia has submitted a draft to the UN Security Council, requesting a resolution to halt the fighting as soon as possible.<sup>30</sup> However, unlike the 12-Day War, Iran is now demanding a different outcome. Rather than accepting a simple ceasefire, Iran seeks guarantees that it will not face a similar attack in the future and has made it clear that it will not suspend its operations until such assurances are provided.

Iranian Deputy Foreign Minister Kazem Gharibabadi stated, "Our first condition for a ceasefire is that the aggression must not be repeated."<sup>31</sup> Similarly, Parliament Speaker Mohammad Baqer Qalibaf declared, "Certainly we aren't seeking a ceasefire. We believe the aggressor must be punished and taught a lesson that will deter them from attacking Iran again. The Zionist regime has consistently perpetuated a vicious cycle of 'war, negotiations, ceasefire, then war again' throughout its disgusting history. We will break this cycle."<sup>32</sup> He thus signaled that Iran will continue its operations while insisting on a durable guarantee of non-aggression. Additionally, senior Iranian diplomat and current foreign policy advisor to the supreme leadership, former Foreign Minister Kamal Kharrazi, told a *CNN* team in Tehran on the tenth day of the war, "I don't see any room for diplomacy anymore," indicating that Iran is preparing for a protracted conflict.<sup>33</sup> Consequently, Iran is demonstrating an elevated stance. The inability of the U.S. to achieve its objectives in the short term has created a con-

text in which Iran can assert higher demands.

Indeed, during the first 12 days of the conflict, it became apparent that the U.S. remains far from achieving its objective of regime change. Meanwhile, Iran's ballistic missile and nuclear programs continue to advance unabated, and its network of regional armed groups remains operational. At the same time, a new and relatively young supreme leader has assumed office. And based on the limited information regarding his connections and background, it can be reasonably concluded that he is not a reformist. Thus, none of the U.S.' expectations regarding Iran have materialized.

Wars typically conclude when one or both parties reach the point where continuing the conflict becomes unsustainable. This does not imply a military defeat for the U.S. side. Rather, it results from the disruption of global economic balances and the domestic pressures surpassing tolerable limits. Partly, it stems from the public visibility of American losses and the political backlash that would follow. The midterm elections scheduled for November make it impossible for Trump to sustain the war at its current level. He will either need to escalate the scope of the conflict or craft a narrative of victory to justify ending military operations through perception management. One option under consideration for escalation is deploying boots on the ground. Should this path be taken, we could be facing a war with perhaps the most severe consequences of the 21<sup>st</sup> century.

In any case, critical questions remain regarding how the new supreme leader, Mojtaba Khamenei, will conduct the war and negotiate a comprehensive ceasefire and peace settlement. It is known that Mojtaba volunteered at the front during the Iran-Iraq War at the age of 17. However, it can be argued that those experiences will have limited applicability to the current conflict. Considering his close ties to the IRGC, it is likely that Mojtaba will consult closely with senior commanders in managing both military operations and peace diplomacy, with the IRGC's influence reflected in his decisions. In this context, the region faces the prospect of a prolonged war of attrition under various possible scenarios. Regardless, it has become evident that the previous regional order is no longer sustainable. Alliance relationships will need to be redefined, Israel's position will be subject to intensified scrutiny, and this is expected to gradually erode the U.S.' standing in the region. ■

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