



المركز العربي للأبحاث ودراسة السياسات  
Arab Center for Research & Policy Studies

Studies | 26 March 2026

# **Did All That Was Solid Melt into Air?**

## The Islamic Republic at an Impasse

Rouzbeh Parsi

The Iranian Studies Unit

## Did All That Was Solid Melt into Air? The Islamic Republic at an Impasse

Series: [Studies](#)

26 March 2026

Rouzbeh Parsi

Affiliated researcher at Lund University, Sweden. He earned his PhD in History from Lund University in 2009 and previously served as Head of the MENA Program at the Swedish Institute of International Affairs.

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The Arab Center for Research and Policy Studies

Al-Tarfa Street, Wadi Al Banat

Al-Dayaen, Qatar

PO Box 10277, Doha

+974 4035 4111

[www.dohainstitute.org](http://www.dohainstitute.org)

# Table of Contents

Introduction .....	1
The Clockwork That Cannot Turn .....	2
The Supreme Leader's Paradox .....	4
The Exception That Proved the Rule .....	4
Strategic Depth and Its Collapse .....	5
Fearing Your Own People More Than the Enemy .....	6
Not an End, but a Fraying? .....	8
A coda .....	9
References .....	10



## Introduction

In mid-November 2016, in a European capital, I sat across from a senior Iranian diplomat with decades of experience navigating the Islamic Republic's foreign policy apparatus. The conversation inevitably turned to the upset victory of Donald Trump. My interlocutor was sanguine. Like many before him, he assumed that a Republican president would be a more straightforward counterpart, and that American foreign policy was in any case quite predictably hostile and yet quite rational. To be fair, he shared this fundamental misconception of American politics with many in Europe. While the Islamic Republic partly identifies itself in contrast to the US, Europe is culturally conditioned to believe in, and politically dependent on, American political rationality. Yet they were all wrong, having ignored the obvious signs that the body politic of the United States had been veering off course – a trajectory traceable from MAGA, to the Tea Party, to Newt Gingrich shutting down the US federal government in 1995. In this regard Trump is only the personification of a systemic problem.

This miscalculation was not a failure of intelligence – my interlocutor was one of the sharpest minds I had encountered in Iranian diplomatic circles. It was a failure of political imagination, rooted in structural assumptions that the Islamic Republic shares, ironically, with the very Western powers it professes to distrust. The United States perceives itself as rational and is often given this benefit of the doubt by many, including decision-makers in Tehran. In contrast, the latter is believed by many in Washington and European capitals to be irrational and irresponsible. In reality, the American political system is not as rational as many ardently would like to believe, nor is Tehran as “crazy” as many complacently assume. The primary objective of the leadership in Tehran is regime survival; its secondary aim is to achieve and maintain regional prominence. Neither of these goals is irrational, though they may be unpalatable for many, nor is the behaviour of elite coalitions indicative of some reckless urge to fulfil a death wish.

The misperception runs in both directions and is reinforced by institutional incentives. International actors have long ignored the complexity of Iran's internal debate and focused exclusively on the Supreme Leader, an obsession that underplays the structural constraints within which even the most pragmatic Iranian leader must operate. Tehran, in turn, has misread the West's capacity for self-destructive decision-making because it projects its own survival-oriented rationality onto systems that are driven by entirely different domestic imperatives.

This symmetry of misperception – each side imputing to the other a rationality or irrationality that does not match reality – is not merely an analytical fallacy. It has serious geopolitical repercussions that have steadily worsened since Hamas' terror attack on 7 October 2023. The Islamic Republic now faces a convergence of crises – a polycrisis – of an intensity that even its resilient, if ramshackle,

structures may not be able to absorb.<sup>1</sup> To understand why, we need to look not at what Iran's leaders do not know, but at what they cannot bring themselves to do.

## The Clockwork That Cannot Turn

The Islamic Republic is an oligarchy, not a personal dictatorship, and this is both its survival mechanism and its downfall. The system consists of what might be called a clockwork of group constellations – factions, institutions, networks of patronage and ideology – that must somehow move in the same direction for important decisions to be made. For decades, this improbable machinery has managed to function, sometimes despite its own internal contradictions and dysfunctions. But the clockwork has been slowing, and it is now seemingly approaching a standstill.

The system was designed around consensus. Ruhollah Khomeini, the father of the revolution and its final arbiter, had to reconcile himself to the fact that his political elite was factionalized into radicals and conservatives, statist and free marketeers. At important junctures he took decisions and forced the various personalities and factions to acquiesce. His gambit was to use the factions' mutual antagonism to reinforce his own position as the indispensable arbiter.<sup>2</sup> Ali Khamenei claimed to follow a similar path. In 2005 he stated that “the two factions are like wings [of a bird] and with these two wings the country can fly”, but with the caveat that government needs to be unified and that basic allegiance to the constitution is necessary for participation in the governing of the country.<sup>3</sup> He of course did not address his own arbitrary way of adhering to and abrogating that constitution.

When Khamenei succeeded Khomeini as Supreme Leader in 1989, he did not have the prerequisite religious credentials, and the constitution had to be revised to allow for someone with the right revolutionary resumé to inhabit the pinnacle of the institutional pyramid, a position that is supposed to wield political power in the name of religion. Following Khomeini's fatwa in 1987 which declared that the state defined what was good for Islam, the revision of the constitution and Khamenei's ascent to power was in essence the final nail in the coffin of the Islamic Republic as a project that intended to create politics through religion.<sup>4</sup>

Thus, Khamenei had neither Khomeini's religious authority nor his political gravitas. He sought support for his own position and authority and in this allied himself closely to what emerged as the (politically and culturally) conservative wing of the political elite. Ever reactive rather than pro-active, his vision for Iran was primarily to conserve revolutionary ideals (whose substance is not universally

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1 Adam Tooze, “Welcome to the World of the Polycrisis,” *Financial Times*, 28 October 2022, <https://acr.ps/1L9B9iT>; Lawrence, Michael Lawrence et al., “Global Polycrisis: The Causal Mechanisms of Crisis Entanglement,” *Global Sustainability* 7 (2024): e6.

2 On Khomeini's deliberate balancing of factions, see Mehdi Moslem, *Factional Politics in Post-Khomeini Iran* (Syracuse, NY: Syracuse University Press, 2002), 4; Daniel Brumberg and Farideh Farhi, eds., *Power and Change in Iran: Politics of Contention and Conciliation* (Bloomington: Indiana University Press, 2016).

3 Ali Khamenei, “Statements in Meeting Students Form the Province of Kerman,” *Khamenei.ir*, 9 May 2005, <https://acr.ps/1L9BadU>.

4 Saïd Amir Arjomand, *Sociology of Shiite Islam: Collected Essays* (Leiden and Boston: Brill, 2016); Rouzbeh Parsi, ed., *Iran: A Revolutionary Republic in Transition* (Paris: European Union Institute for Security Studies, 2012). <https://acr.ps/1L9B9Oy>.

agreed on) and combat influence from the West – in essence to try and keep the rest of the world from seeping into Iranian society and forestall the inevitable process of Iranian society leaving the revolution behind.

What was once a dynamic, if fractious, system of competition has over time calcified into a stalemate of mutual cancellations. Each group's ability to block its competitor has become the height of its ambition and, increasingly, the limit of its ability. The system with several centres of power reflects not broad consensus but, as one analyst has put it, "querulous diversity": policy results from competition and trade-offs, generating inconsistency and contradictions.<sup>5</sup> The greatest intra-elite crisis was the contentious results of the presidential election in 2009. The hardliners, backed by Khamenei, rammed their candidate Mahmoud Ahmadinejad through, while another of the founding sons of the revolution, Ayatollah Hashemi Rafsanjani, backed the more likely winner of the race, former prime minister Mir Hossein Mousavi. At this point the *nezam*, the political system, stretched its own credulity beyond the breaking point by accusing the former prime minister (then a radical) who led the country through the war against Iraq of being an American asset. After millions-strong demonstrations against the official election results were violently suppressed, a number of elite insiders were put on show trials and convicted of spurious charges. Mousavi himself is still living under house arrest. This rift has never healed but was somewhat bridged when Hassan Rouhani became president on the promise of solving the conflict with the US and EU over the nuclear enrichment program.<sup>6</sup>

The Supreme National Security Council remains the one institution where deliberation on existential questions – the nuclear programme, the response to Israeli attacks, the handling of mass protests – still occurs with all key players at the table. But even this arena is constrained by the factional dynamics that suffuse the entire system. And the Guardian Council, which vets all candidates for elected office, has progressively eliminated the competitive dynamic that the system needs for its own legitimacy. In the 2021 presidential election, the field was so thoroughly cleared for the establishment's preferred candidate, Ebrahim Raisi, that voter turnout dropped to a historic low.<sup>7</sup>

The conservative camp's fundamental problem runs deeper than tactics. They lack their own vision for Iran. They are usually barely capable of making decisions even when they possess all the state's instruments of power. Their coherence and focus are almost entirely a by-product of their hostile reaction against the reformists and the population's demands for change. Strip away this enemy, and what remains is not a programme but a void. The hardliners are far more vocal when they can stick to their favourite pastime – assailing the reformists – than when they are asked to explain what they actually want for the country.

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5 Kevjn Lim, "National Security Decision-Making in Iran," *Comparative Strategy* 34, no. 2 (2015): 151, quoting Shahram Chubin, *Iran's National Security Policy: Capabilities, Intentions, and Impact* (Washington, DC: Carnegie Endowment for International Peace, 1994), 67.

6 Saïd Amir Arjomand, *After Khomeini: Iran Under His Successors* (New York: Oxford University Press, 2009); Rouzbeh Parsi, "Iran in the Shadow of the 2009 Presidential Elections," *Occasional Paper* no. 90 (Paris: European Union Institute for Security Studies, 2011), <https://acr.ps/1L9Ba1C>.

7 Mehran Kamrava, "Iran's Domestic Politics One Year into the Raisi Presidency," *The Muslim World* 113, nos. 1 - 2 (2023): 3 - 5.



## The Supreme Leader's Paradox

The etymology of the word revolution is the Latin *revolutio*, meaning circular motion. The soaring ambitions of the French Revolution engendered the imperial rule of Napoleon. Similarly, the Supreme Leader of the Islamic Republic is today a monarch of sorts with an office that has expanded significantly in the last 15 years and is now involved in matters of state. Supreme Leader Ali Khamenei was too central to be ignored, yet too weak and lacking in authority and imagination to break new ground and take the republic he has presided over for almost four decades out of the impasse that is so much of his own making.

Khamenei supported the hardliners at every turn and was often portrayed as the person who could balance them – a self-serving narrative, since the imbalance was largely of his own making. His attempt at securing the *nezam*, the system, is probably the very act that has destabilized it most. His strategy failed primarily because his vision for the Islamic Republic was in essence a lack of one. He became more conservative over the years, placing ever greater weight on paternalistic control and showing ever greater distrust of the people's ability to choose their own path, even as he simultaneously needed the legitimacy that only popular participation in elections can bestow.

But it would be too simple to pin everything on one man, supreme as he may have been in name. While Khamenei may have called the shots, these were constrained by ideological, institutional, and political factors. The need for domestic support induced him to cleave ever further rightward, especially toward the IRGC, thereby exacerbating domestic factionalism and ensuring that the militant hardline became the normative position from which any departure had to be justified. The result was a leader who was simultaneously the system's centre of gravity and its principal obstacle to adaptation.

## The Exception That Proved the Rule

In the foreign arena, the closest Khamenei came to decisiveness was when he accepted the idea of negotiating a nuclear agreement with the United States. It was outside his comfort zone, and it probably was a relief for him when Donald Trump vindicated his worldview by leaving the deal in 2018. The Joint Comprehensive Plan of Action (JCPOA) was an exception to how all parties usually go about dealing with each other, and that probably accounts for its success. But it turned out to be an exception that confirmed the rule.

The JCPOA required an unusual alignment of forces. Iran needed to get out of the economic impasse US sanctions put it in, and the Obama administration acknowledged that its economic sanctions on Iran would not halt the nuclear enrichment program. Thus both parties could hurt each other but not get what they wanted through sheer coercion or defiance. Having been re-elected, Obama could afford to try something novel, and in the June 2013 presidential elections in Iran Hassan Rouhani won on the promise to restart diplomacy and resolve the nuclear issue once and for all. Rouhani

occupied a unique position in the system, with ties to both the security establishment and the reformist camp. In September 2013, Khamenei gave a speech framing Iran's willingness to negotiate as "heroic flexibility" – a phrase designed to shield the enterprise from hardline critics who viewed any interaction with the United States as treasonous.<sup>8</sup>

The agreement showed that a more constructive path existed. For the Iranian population, who celebrated its signing in the streets, it promised reconnection with the world. But this was precisely the nightmare scenario for Khamenei and the hardliners. An Iran connected to the world unfiltered would mean that the population, very much living in a post-revolutionary world, would slip further from their grasp. The long-term scenario – a fully functioning relationship with the United States – was the Gorbachev scenario: an opening that, once begun, could not be controlled.<sup>9</sup>

Trump withdrew from the agreement in 2018, reinstating and augmenting sanctions. Tehran gave the EU one year to shore up the agreement and ensure that the economic incentive which was Iran's reward for curtailing its nuclear programme would still be in effect. The EU failed miserably, showing that it had no strategic autonomy in the financial field at all. The agreement was still valid in theory, but no economic flows were possible under draconian American sanctions. Tehran used an old strategy to try and apply pressure to the EU and the US: they stopped adhering to the agreement step by step, increasing their enrichment activities. In Iran, President Rouhani and the reformists who had championed the JCPOA were blamed for the country's predicament. The exception was over. The rule had reasserted itself.

## Strategic Depth and Its Collapse

Iran's strategy of creating strategic depth through proxy networks – Hezbollah in Lebanon, allied forces in Syria and Iraq, and the Houthis in Yemen – was designed to deter Israel and compensate for conventional military inferiority. With Israel and the United States attacking Iran's nuclear facilities in June 2025, one must conclude that the strategy has failed. This failure of deterrence and strategic depth has been confirmed since then with the illegal war initiated by the United States and Israel on 28 February 2026.

This failure has several dimensions. Iran's strength has always lain in the weapons of the weaker actor – the guerrilla tactics of asymmetric pressure and denying the enemy control over territory. The engagement in Syria violated this principle. Holding territory is precisely when a guerilla force will be at its most vulnerable, as it endures the exposure of a conventional military force but without the advantages of the latter. Syria became both a strategic failure and a moral stain, as a result of the

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<sup>8</sup> Ali Khamenei, "Leader's Speech in Meeting with Commanders of Islamic Revolutionary Guards Corps," 17 September 2013, <https://acr.ps/1L9BadU>.

<sup>9</sup> Jafar Hassankhani, "The Gorbachev Moment: Analysis of the Latest Move of the Radical Reformists," *Tasnim News Agency*, 19 August 2025, <https://acr.ps/1L9B9JH>; see also Zhand Shakibi, *Khatami and Gorbachev: Politics of Change in the Islamic Republic of Iran and the USSR* (London: Bloomsbury Publishing, 2010).

deployment of sectarian militias that undermined whatever legitimacy Iran's regional posture once might have claimed.

More fundamentally, the strategy rested on an assumption about Israeli and American rationality that turned out to be wrong. Put simply, Tehran assumed that the United States would understand that a war would be very costly (in every sense), that the outcome would not be a foregone conclusion, and, thus, that it was not worth the risk. Tehran believed that its restraint in the exchange of missiles and drones with Israel in 2024 and then during the Twelve Day War in June 2025 showed that it is a responsible actor that is not seeking an escalation of the simmering conflict. In Washington and Tel Aviv this restraint was, however, interpreted as weakness – an inability to strike back with force.

Israel has seldom hesitated to use force when it feels threatened or its interest might be strategically imperilled. Throughout the history of the occupation of Palestinian territory, it has also become clear that the Israeli political elite prefers short term military operations that can help defer and postpone difficult political reckonings and decisions. Especially after 7 October 2023, Israel has gone on the offensive, secure in the knowledge that its military operations have full political, economic and logistical cover and support from the US and EU. Counting on everyone else to grasp the foolishness of risking regional war only works if the other side believes it cannot pay the price, or that there indeed is a price to pay. The ongoing genocide Israel is perpetrating in Gaza with near impunity suggests that Prime Minister Benjamin Netanyahu does not believe Israel will be held to account for any of its military adventures.<sup>10</sup>

Quite often the assumption is made that states that are competitors or adversaries of the US will enter an alliance with one another. Russia, Iran, and China have reason to see eye to eye when it comes to the dominance of the US hegemon, yet this does not amount to an alliance. While Beijing buys some oil from Iran (albeit at a scale dwarfed by its economic exchange with UAE and Saudi Arabia) it has yet to show itself willing to spend political capital on helping Iran in its constant tit-for-tat with the US. Under these conditions, nuclear ambivalence à la Israel is not an advantage: it constitutes a liability rather than a deterrent. Iran's overarching conflict with the US and Israel, including the war unfolding right now, is a mess partly of its own making; and its resolution is not something Beijing is interested in investing in. For these reasons, the Islamic Republic has probably never been such an international pariah since its war with Iraq.

## Fearing Your Own People More Than the Enemy

Prussia's Frederick William III is said to have rejected the plan of arming his own population to resist Napoleon's army that had invaded his realm because it might ignite an insurrection against his own

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<sup>10</sup> Office of the United Nations High Commissioner for Human Rights (OHCHR), "Israel Has Committed Genocide in the Gaza Strip, UN Commission Finds," 16 September 2025, <https://acr.ps/1L9B9jZ>; Omer Bartov, "I'm a Genocide Scholar. I Know It When I See It," *New York Times*, 15 July 2025, <https://acr.ps/1L9Baky>.

despotic rule.<sup>11</sup> Similarly, the political and military elite of Iran is learning that mistreating your own people creates chinks in your armour – chinks that Israel has made very good use of.

The pattern of domestic alienation is not new, but its acceleration is. There has been a steady increase in the frequency and attendance of protests – from everyday ones prompted to the dysfunction of governance, to those whose cause was immediately political: 1999, 2009, 2017–2018, 2019, 2022. Each wave has been broader, more radical, and more explicitly directed at the system itself rather than at discrete grievances. The worrying trend of increased use of violence against protesters reached unimaginable heights in January 2026, when more than 7,000 people were killed.<sup>12</sup> This represents an utter militarization of how the state deals with mass protests. While the trend was already there it is difficult to not see this event in the light of the war in June 2025. In that war Israel and the US were hoping that the strikes would ignite massive unrest from which the Islamic Republic could not recover. This did not happen and as the protests grew rapidly in January it seems Tehran wanted to manifest its deterrence on the home front as a substitute or complement to the failing deterrence on the external front. No matter the threat perception and motivation, this massive crime against the citizenry has deepened the already existing rift between the majority of Iranian society and the state.

The Islamic Republic's lack of legitimacy in the eye of its citizens was already at an all-time high. But the events of January went beyond this and undermined the authority of the system. In a somewhat simplistic way, we may view the core of any state as a relationship between violence, authority, and legitimacy. A state cannot survive on sheer force (as Weber argued); once force becomes the only instrument of governance, authority itself evaporates (as Arendt showed).<sup>13</sup> From this we can infer that legitimacy can be gained by providing society and the citizenry with basic services and hope for the future – of this very little has survived Trump's sanctions and the rudderless leadership of Khamenei. Governance is a concept that only makes sense when legitimacy is an ambition.

In simple terms of electoral politics, Khamenei always insisted that high voter turnout demonstrates popular support for the Islamic Republic. But the hardline groups in the conservative camp know that their appeal among voters is not great. Their solution – eliminating all competitive candidates through the Guardian Council – produces the majorities they need at the cost of the participation they claim validates the system. The 2021 election, with its historically low turnout, was the logical endpoint of this strategy. Some in the conservative camp have even floated the idea of abolishing direct presidential elections altogether, replacing them with a parliamentary system where a prime minister would be chosen from a legislature already purged of dissent.

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<sup>11</sup> Peter Paret, *Yorck and the Era of Prussian Reform, 1807–1815* (Princeton, NJ: Princeton University Press, 1966), 155 - 57.

<sup>12</sup> Human Rights Activists News Agency (HRANA), "The Crimson Winter: A 50 Day Record of Iran's 2025–2026 Nationwide Protests", 23 February 2026, <https://acr.ps/1L9B9GX>.

<sup>13</sup> Max Weber, *Economy and Society: A New Translation*, ed. and trans. Keith Tribe (Cambridge, MA: Harvard University Press, 2019 [1922]), 338-39; Hannah Arendt, *On Violence* (New York: Harcourt, Brace & World, 1969), 43 - 56.

Here a crucial distinction must be made – one that the Islamic Republic itself has been forced to acknowledge. When Israel initiated military operations in 2024–2025, the resultant rallying around the flag stemmed from the idea of the *nation* of Iran and a state that governs and defends it – not from the Islamic Republic as an ideological project. The regime understood this, hence its own references and affirmations of the Iranian nation rather than the revolutionary cause. It was yet another confirmation that the most successful state-led project by far in the last hundred years of Iranian history is nationalism. In a sense the political elite of the Islamic Republic is well aware that Iranian society has left the revolution and its stale and unfulfilled promises behind, and that any mobilization requires an appeal to a sense of national belonging.

The other leg of state rule is authority, the bare bones of what makes state rule viable, the ability to command the citizenry even against its own will on the assumption that the state knows what is best and in return will provide basic safety for the population. This was to a large degree destroyed or put in question in January 2026.

## Not an End, but a Fraying?

It remains an eternal illusion that if politicians were only better informed, they would make better decisions. As Barbara Tuchman argued, more often than not it is not insight and knowledge that is missing. It is the courage to risk political life and capital: the courage to stop doing what has already been done and go in a different direction.<sup>14</sup>

If the first nightmare of every revolutionary is a counter-revolution, and the second is foreign intervention to that effect, the hardliners in Iran have diligently worked, through action and inaction, to concoct a perfect storm of both. The implacable hostility of the hardline clerical establishment to paying the domestic price that a genuine opening would entail has been the single greatest obstacle to Iran's ability to manoeuvre the geopolitical landscape and thread the needle in its negotiations with the United States. They know what the problems are – even the ones that directly pertain to their own shortcomings. It is not a question of ignorance. It is a question of political courage and the willingness to pay a political price to chart a course that pays off in the long term.

Dysfunctional systems tend to last longer than anyone is willing to countenance. It would be foolish to claim that this is, in some law-bound sense, the beginning of the end. But if not an end, then it is at least a series of iterations through which Iranian society is emaciated and the state frays.

The polycrisis – economy, societal peace, foreign policy, the threat of war – is converging with an increasingly disintegrating political elite. The next question is whether there will be enough people on the other side of the divide (that is, in society) willing to listen and give credence to system apparatchiks claiming they are willing and able to do better. For many Iranians, the simplistic

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<sup>14</sup> Barbara W. Tuchman, *The March of Folly: From Troy to Vietnam* (New York: Knopf, 1984).

spectrum of insider politics, of reformists versus hardliners, no longer resonates. Neither camp has managed to come up with a vision for a better Iran and see it through. Admittedly, those lumped together as reformists at least had an idea of how to move forward but were stopped at every turn by the hardliners. And the hardliners of the more traditional cut had just that as their primary purpose and centripetal force: obstruct the reformists.

The manner and depth of change matters. While the notion of reform has gained a bad reputation among many Iranians, the fact remains that if change in Iran comes through internal pressure, it will be less dramatic and also less bloody. If it comes through a war instigated from outside, the end result will be more chaotic and less likely to produce stability. The hardliners, in their determination to prevent the former, may well be ensuring the latter. This is perhaps the cruellest irony in a story that has no shortage of them.

## A coda

In many respects the discussion in this paper takes on a new meaning with the violent repression of protests in January 2026 and the war initiated by the US and Israel in February 2026. These two events are going to have far-reaching consequences. The first tells us something has been broken, and while mending it is a tall order in and of itself, the ensuing war might in any case make the challenge moot. Either way, the killing of Ali Khamenei spells the end of the longest phase in the history of the Islamic Republic. His eventual demise would have been the end of a chapter, but being “martyred” will definitely lend more valour to his legacy among his supporters. That he is replaced with his son Mojtaba, is probably to a large degree due to the war. Continuity in government with a twist, as it were. The long-term repercussions if the Islamic Republic were to survive will be significant. The position of the Supreme Leader will, through this choice, resemble kingship even more – a semblance that the Republic will have difficulty justifying.

It is clear that US President Trump changes his mind every day about the justification of the war and its ambition – in essence he initiated a war and is only now looking for its strategy. Israel has a much more straightforward goal in sight: the destruction of the Iranian state as a functioning entity.<sup>15</sup> Each day of continued massive bombardment and destruction of life, property, and infrastructure will take Iran closer to that abyss.

If the Islamic Republic survives this war, it will enter a new, and even bleaker, chapter in its history. If the war destroys the republic and there is no force to take over the reins of power, the country risks a prolonged period in which nothing solid remains to build on. If, and when, a new political order emerges from this debris and chaos is unclear, but without societal reconciliation and peace, the country risks learning once more that revolutions devour their children – and that wars devour what the revolutions leave behind.

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15 Rouzbeh Parsi, “Here’s What the Iranian Regime Is Thinking,” *Times of India*, 3 March 2026, <https://acr.ps/1L9B9XO>.

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