



After the assassination of Ali Larijani, is the Iranian regime really weakened?

To what extent does the ongoing war between the United States of America, Israel, and Iran reflect a structural reconfiguration of the balance of power in the Middle East? This conflict, now embedded in a sustained dynamic of high intensity, highlights the growing divergences between American and Israeli objectives, while revealing new patterns of alignment, fragmentation, and strategic competition that are reshaping the regional landscape. It also forms part of a broader process of shifting power relations at the intersection of Middle Eastern rivalries and the repositioning of major global powers.

In partnership with the Atlantic Middle East Forum (AMEF) and the Foundation for Defense of Democracies (FDD), this event was held as part of the activities of the MENA Observatory of the Fondation Jean-Jaurès. It was chaired by David Khalfa, co-director of the Observatory, and Yasmina Asrarguis, a member of the Observatory. This briefing, intended for the press and researchers, is summarized in the report below, written by Rachel Nakache, Project Officer at the Fondation Jean-Jaurès.

Executive Summary

The American-Israeli campaign against Iran has moved beyond a brief show of force. After more than twenty days of strikes, it has become a prolonged conflict. Washington presents itself in a defensive posture, neutralizing the most lethal components of Iran's arsenal, but in practice its raids aim to erode Tehran's deterrent capacity. Israel, for its part, is explicitly targeting the core of the regime. Its recent strikes have hit Basij paramilitary units, the Islamic Revolutionary Guard Corps (IRGC), and key installations in an effort to disrupt the functioning of the Iranian state. This military pressure is also political and narrative in nature (notably through calls for the liberation of Iran), yet the allies have no immediate plan for regime change. Thus, mindful of domestic opinion and the risks of political fatigue, American engagement could end before any collapse of the regime occurs.

Inside Iran itself, the regime is faltering but holding firm. In early 2026, unprecedented protests shook the country, with nearly 1.5 million people taking to the streets in southern Tehran. The crackdown proved extremely brutal, resulting in thousands of deaths over several weeks of

demonstrations. Despite the killing of numerous senior officials, the regime did not collapse. Designed as a resilient system, it endures by relying on the strength of its security apparatus and the continuity of its chains of command. The authorities remain in power in the face of a fractured population. Abroad, the Iranian diaspora mobilized on a large scale, particularly in Europe and North America (including up to 150,000 people in Toronto and 100,000 in Munich) in support of the protests, reflecting the emergence of unprecedented international backing. Overall, the internal balance of power remains uncertain: the uprising hasn't been consolidated by a structured opposition, and any regime change would depend on an endogenous dynamic reinforced by external support.

This operation also unfolds on the global stage. On the one hand, Washington is integrating the Iranian issue into the broader Sino-American rivalry. Beijing is indeed the main economic backer of Tehran: it purchases nearly 80% of Iran's oil exports and facilitates access to dual-use technology import channels. On the other hand, Russia maintains an arms-based partnership with Iran. Despite the war in Ukraine, Moscow has transferred drone technology to Tehran and, according to the Ukrainian president, has even begun supplying Iran with Russian-designed Shahed drones to strike American and Israeli positions. Ultimately, neither Beijing nor Moscow has broken with Tehran, and both contribute to circumventing Western sanctions. Finally, the war has reshaped regional alliances. The Gulf monarchies, long engaged in a policy of stabilizing their relations with Iran, now find that their rapprochement strategy has partly backfired. Their territories are now exposed to strikes, while their policy of dialogue appears to have failed. Under the pressure of the Iranian threat, they are gradually realigning towards Israel, and indirectly, towards the United States.

The Limits of American-Israeli Coordination Against Tehran

The conflict has now gone on for more than twenty days, a threshold that is, in itself, already revealing. Far from a swift strategic strike or an ephemeral show of force, the war has become entrenched. It has now exceeded the tempo of the Twelve-Day War, gradually sliding into a prolonged conflict.

In this context, Washington is advancing under the cover of a defensive mission, a framing that barely conceals a more offensive reality: namely, the neutralization of the most lethal segments of Iran's security apparatus. It is worth recalling that, for two decades, Iran has maintained the largest ballistic missile arsenal in the Middle East, while dispersing its capabilities through regional proxies, this so-called "Axis of Resistance" having become a strategic extension of its power. The American strikes fit into this logic of gradually eroding Tehran's capacity to deter, or even retaliate, by directly targeting its ballistic capabilities. Each raid is not only military but also political, intended to demonstrate that Iranian power is not untouchable and that its coercive tools can be neutralized.

However, the allied approach remains far from homogeneous. Whereas the United States targets capabilities, Israel favors a logic of "decapitation" of Iran's security apparatus. In recent days, Israel has directly struck the regime's repressive infrastructure, hitting the Basij paramilitary forces, certain units of the Islamic Revolutionary Guard Corps, and key security installations. The objective is therefore to disrupt the very core of the state.

In this perspective, Behnam Ben Taleblu, director of the Iran Program at the Foundation for Defense of Democracies (United States), describes the regime as a “zombie”: weakened, partially decapitated, yet still capable of causing harm. The Iranian state is faltering, revealing pockets of vacuum and fragmentation of power, without however collapsing. It is precisely in this in-between state, neither stability nor collapse, that the highest risks are concentrated. Iran thus becomes a diminished but unpredictable actor, still able to project violence across multiple fronts.

Washington and Jerusalem therefore adopt distinct yet complementary lines of action, serving a common strategy.

In this context, speculation about the infiltration of Israeli intelligence services into the heart of the Iranian regime is widespread and often amplified by collective imagination. But behind these narratives lies a complex and more precise reality. The first question to ask is: what type of intelligence are we talking about? Human intelligence, through local networks, or digital intelligence, enabled by cyber capabilities?

During the Twelve-Day War, an Iranian Aerospace Forces commander used to say that certain mobile phones had become true “mobile spies.” The idea was far from anecdotal. In many cases, targets were not monitored directly through their own devices, but through those of their close entourage, particularly their bodyguards. By correlating the location and activities of these individuals, the intelligence obtained was almost equivalent to that provided by an infiltrated human source. This does not mean, however, that human intelligence has disappeared—quite the opposite. Internal leaks and complicity within the state apparatus itself continue to play a decisive role. Iran’s former Minister of Intelligence, Ali Younesi, summarized this vulnerability by stating that “no Iranian official should feel safe at night,” revealing the extent of the system’s potential security gaps.

At the same time, during the same conflict, Israel relied on local Iranian intermediaries: drone engineers, suppliers of military components, and even field operatives capable of targeting air defenses, missile sites, and command posts. The question today remains open: what has become of these networks? Have they been dismantled, driven underground, or kept in standby for future operations? For now, the answer remains out of reach.

Israel’s penetration now appears to rely on a sophisticated combination of human and technological means, linking physical infrastructures with the exploitation of digital data (surveillance cameras, traffic patterns, and so on). These methods have likely enabled foreign intelligence services to track the behavior of Iranian regime members with considerable precision, revealing a largely invisible dimension of the war.

In this shadow war, espionage thus emerges as a decisive lever, capable of reshaping the balance of power and, in the longer term, influencing the trajectory of regimes themselves.

Behnam Ben Taleblu notes that recent history offers a critical precedent. During the previous summer, the synchronization of operations failed, exposing a tangible risk of strategic misalignment. Such a divergence could recur if Washington were to opt for an early withdrawal while Israel continued its targeted strikes. Tehran would be able to exploit this gap, opening the way to potential retaliatory actions, notably against Gulf energy infrastructure. Such a scenario could draw in other regional powers and test the cohesion of the alliance. The allies’ vulnerability

therefore lies not only in their military capabilities, but also in the divergence of their strategic timelines.

To this is added the weight of the domestic political factor in the United States, which is decisive in the conduct of operations. Under the Trump administration, tactical flexibility remains constrained by domestic variables such as the energy market, public opinion, and pressure on economic growth.

In this context, the announced horizon for the end of the conflict, estimated at between one and four weeks, reflects a desire to concentrate military effort while containing political and economic costs. However, this timeline is in tension with Iran's strategy, which instead seeks to prolong the confrontation in order to turn it into a war of attrition.

As a result, the military campaign cannot be separated from its political extensions. Allied objectives are structured around a dual logic, balancing the neutralization of Iranian military capabilities with the outline of a potential political exit framework. Yet such a framework remains uncertain in Washington, where the debate oscillates between a pragmatic approach aimed at stabilizing a weakened regime and a maximum pressure strategy seeking more profound transformation.

In this in-between space, consensus objectives such as support for the Iranian people, energy security, and regional stability serve as guiding principles, without however resolving the central equation: how can an immediate military advantage be converted into a political outcome that is both durable and structurally transformative?

Faced with this uncertainty, Behnam Ben Taleblu identifies several possible trajectories of action enabling Washington to adjust its engagement, redefine the balance of power with Tehran, and structure the post-conflict environment. Three options emerge.

The first consists in maintaining a defensive American mission. This would involve continuing the campaign through targeted strikes against Iran's key military capabilities (launch bases, production facilities, missile-related infrastructure, etc.), before declaring a form of victory by highlighting these results. The objective would be to demonstrate that Iran's military capacity for harm has been significantly weakened. However, Behnam Ben Taleblu underscores the limits of this approach. It leaves the regime's political structure intact and does not address its underlying foundations. The risk is therefore that of a military pause which, in the absence of a coherent political strategy, would give Tehran space to regroup and rebuild its networks of influence.

The second option shifts the center of gravity toward securing the Strait of Hormuz, a critical chokepoint of global energy trade. It would involve the United States concentrating its efforts on protecting strategic maritime flows in order to ensure the free circulation of oil and stabilize markets. In this scenario, the objective is primarily economic and diplomatic, as it seeks to reassure Gulf allies and contain energy shocks. This option, often seen as complementary and compatible with the priorities of the Trump administration, does not aim to directly address the Iranian military threat, but rather to contain its effects.

The third option targets the core of the nuclear issue, focusing on the management of fissile materials. It would consist in neutralizing stocks of highly enriched uranium (60%), particularly

those located at sites such as Isfahan. By confiscating or securing these materials, the aim would be to prevent any pathway toward nuclear weapons. The focus here is on addressing the urgency of the nuclear risk, but once again this approach leaves the regime's political structure intact.

However, according to Behnam Ben Taleblu, only one option goes beyond these approaches: the "Iranian model." This does not rely on broad-based strikes, but on support for a popular uprising already underway, in a logic reminiscent, by analogy, of Iran in 1978–1979. In this framework, targeted airstrikes would neutralize the main repressive apparatus in order to protect the hard core of the protest movement.

Although this model is described as costly and uncertain, with its uncertainties and unpredictability, it rests on the following premise: forty-seven years of an oppressive status quo have produced neither genuine peace nor lasting stability. According to its proponents, it would open the possibility of a strategic transformation of Iran, potentially fostering the emergence of more pro-Western dynamics within society.

However, this model is based on several critical assumptions. It differs from past experiences such as Iraq, Afghanistan, or Libya, insofar as regime change would be primarily endogenous, with external intervention playing an amplifying rather than substitutive role. It also builds on the observation that internal popular uprisings—from the 2018 wave, to the 2019–2020 protests, the Woman, Life, Freedom movement of 2022–2023, and the mobilizations of early 2026—have failed to produce lasting systemic change. It is in this persistent gap between a mobilized society and a resilient state that, according to Behnam Ben Taleblu, the rationale for potential external military support lies, aimed at rebalancing the power relationship between state and society. In this framework, the hypothesis of joint action by Israel and the United States appears as an almost ideal configuration to support Iranian protest dynamics. Implicitly, the analyst's message is unambiguous: if such a strategy were to be adopted on a larger scale, its effectiveness would depend less on the intensity of the strikes than on the subtlety of their orchestration.

The Iranian regime facing the erosion of its foundations

The popular protest movement that has been unfolding across Iran for several years, and whose intensity has significantly increased in recent months, increasingly resembles a moment of historical rupture. The demonstrations of December 2025 and January 2026 are not merely an exceptional quantitative phenomenon; they above all reflect a profound qualitative shift, both in their scale and in their social and territorial composition. At the peak of the mobilization, nearly 1.5 million people took to the streets in southern Tehran alone. Beyond the figures, however, it is the very nature of the movement that is striking: spread over several weeks, it has managed to bring together segments of the population that had long remained fragmented. This transversal character in itself constitutes a major strategic signal, revealing a deep erosion of the segmentation mechanisms (social, geographic, and identity-based) that had until now ensured the regime's resilience.

More importantly, the symbolic register of the mobilizations reveals a profound ideological shift. Slogans such as "From Zahedan to Tehran, my life only for Iran" reflect a move toward civic nationalism, detached from religious cleavages, which tends to reconfigure lines of solidarity

within Iranian society. The protest is no longer structured around peripheral or communal demands, but around a reappropriation of the very idea of the nation.

In response to this sequence of events, the state's reaction has reached a level of violence unprecedented in the past 200 years of the country's modern history. Behnam Ben Taleblu emphasizes the "immediate and brutal" nature of the repression, marked by a death toll estimated between 30,000 and 43,000 in just a few weeks and by the simultaneous deployment of the Basij, riot police forces, the regular army, and the Islamic Revolutionary Guard Corps. This recourse to extreme violence goes beyond the classical logic of public order maintenance and reflects the regime's existential reading of the threat. In turn, this escalation of repression acts as a revealer of underlying structural fragility, one that the authorities are no longer able to contain except through force.

This is where a major paradox emerges. The dominant assumption, particularly in many Western analyses, was that such a level of coercion would produce a lasting "shock effect." Yet the available signals, however fragmentary, point in the opposite direction, with resistance that persists and even appears to be taking shape in a more structured manner. This resilience unfolds over the long term. After three decades of electoral deadlock marked by rising abstention and the absence of any real political alternation, the Iranian population is now more willing to accept external support to bring about regime change. In particular, a significant portion of Iranians (up to 80%) reportedly oppose the regime, and many have clearly expressed their desire to see the political system reformed or overthrown. In this context, Behnam Ben Taleblu recalls that there is no "structured opposition" in Iran in the classical sense. The protest landscape remains fragmented and largely forced to organize from abroad.

He also highlights a second paradox: protests in Iran do not call for the country's partition but, on the contrary, for its territorial integrity. Even Kurdish or Baloch minorities, despite their historical demands for regional autonomy, currently appear to align with a unifying national slogan. The opposition thus aspires to a refoundation of Iran within its existing borders. While certain actors may be tempted to exaggerate minority statements in favor of federalism or separatism—such as those of the Democratic Party of Iranian Kurdistan, for example—this does not reflect the majority sentiment on the ground.

In this context, the Iranian diaspora is emerging as a major strategic actor. The protest movement now extends beyond national borders, taking the form of large-scale mobilizations in Europe (such as in Germany in February) and in North America. It is also supported by the structuring of transnational networks and by an increased capacity to place the Iranian cause on the international media and diplomatic agenda.

In parallel with this rise in protest activity, Behnam Ben Taleblu offers a nuanced reading of the regime's institutional resilience, which he summarizes as "paralyzed, but still lethal."

The Israeli-American strikes during the Twelve-Day War nevertheless hit high-level targets, as the president, the vice president, several ministers, and commanders of the Islamic Revolutionary Guard Corps were killed. The shockwave was immediate. Yet it did not produce the expected collapse.

The explanation lies in the very architecture of Iranian power. Indeed, many supporters of the “decapitation” theory, who assume that eliminating leaders would solve the problem, overlook the phenomenon and the operational logic of the Iranian system. The Iranian Supreme Leader, in place for three decades, certainly held strong personal authority, but his success rested on his ability to institutionalize that authority within an extremely complex, almost Byzantine system, with overlapping centers of power and sometimes contradictory authorities. Traditional institutions can be supplanted by revolutionary ones, elected bodies by other structures, and professional lines of authority by personal power networks, and so on. This system is designed with redundancies and overlaps. Under these conditions, the elimination of a few senior officials is not enough to weaken the state, since the system has been built to function as a “zombie system,” where the removal of one head immediately leads to the rise of another.

To illustrate this dynamic, Behnam Ben Taleblu introduces the metaphor of the VCR. In this analogy, Donald Trump’s policy is compared to a simple action: pressing the “fast-forward” button. The film, however, is already in progress. It has been written, produced, and directed by the system of Ali Khamenei. The director, the distributor, the one who inserted the tape into the player—all point to the internal architecture of the Iranian regime. In this reading, the external actor does not create a new trajectory or impose an exogenous scenario; he merely accelerates a dynamic already embedded in the system’s functioning. In other words, the Iranian crisis does not originate from external intervention; it precedes it. External action therefore acts as a catalyst, a speed revealer rather than an originating driver. Thus, if the film accelerates, it is not because it changes its nature, but because its outcome is already latent within it. The remaining question is a major one: does accelerating a trajectory mean controlling its outcome, or hastening its risks?

Who allies, who defies?

Moscow and Tehran: partners against the West

The saying that “there is no honor among elites” aptly captures, in many respects, Moscow’s logic toward Tehran. Russia has consistently managed, in line with its interests, to instrumentalize its relationship with Iran, even “monetizing” its support at the highest possible price. It should not be forgotten that all major United Nations Security Council resolutions targeting Iran were, at one point or another, endorsed by Moscow, often in coordination with Beijing.

Yet we are in a different era. The Russia–Iran relationship is entering an unprecedented phase. If we examine its evolution over the past five centuries, it has taken several forms: initially structured, then strictly transactional after the Cold War, before becoming more transformational under the combined effects of the wars in Syria and Ukraine.

Today, however, a shift is underway. Russia, bogged down in Ukraine, and Iran, seeking external support, appear to be reorienting their relationship toward a more explicitly transactional dimension. The content of these exchanges is particularly sensitive, including tactical assistance against American bases, transfers of advanced weaponry, cash exchanges, and the circulation of Western equipment captured by Moscow on the Ukrainian front. These flows, often opaque, bear the Russian imprint, including under the Biden administration. Added to this is emerging cooperation in the space domain, with the establishment of Iranian infrastructure, joint satellite

projects, and even anti-satellite ambitions. This shift concerns areas of the utmost strategic sensitivity.

A persistent concern remains. In Washington, the perception of this Russia–Iran convergence remains fragmented. Yet the gradual alignment of their respective vulnerabilities opens a rare and fragile strategic window, one that could reshape the balance of power. History will tell whether this opportunity was seized in time.

The Sino-American Rivalry: a Power Struggle Reshaping the Global Order

The confrontation between the United States and China stands as a duel that is profoundly reshaping the contours of an already weakened global order.

Today, Washington is seeking to contain Beijing not only in Venezuela, but also in Iran. Meanwhile, China continues to source Iranian oil at discounted prices—a windfall that strengthens its economic leverage while challenging the West. The current dynamic is clear: it is China that is setting the pace of this global confrontation. In this regard, it is important to acknowledge the legacy of Donald Trump’s first term, which helped forge an unprecedented bipartisan consensus in the United States on the need to contain China. This convergence has gradually spread across the entire American ecosystem (Congress, media, think tanks, universities, and the intelligentsia). This enduring “anti-China monoculture” persists, and a central question remains: is Washington proving capable of matching an environment now structurally defined, over the long term, by rivalry with Beijing?

From this perspective, everything in Washington tends to be interpreted through a Chinese lens—a dominant analytical framework that could gradually incorporate the Iranian dimension more explicitly. If Donald Trump were to significantly delay his scheduled meeting with Xi Jinping, or with a senior Chinese official, it would send a clear and historic signal. Indeed, for the first time since the beginning of his second term, it would acknowledge the need to address the Chinese challenge while fully integrating the Iranian variable. Such a shift would appear not only timely but necessary, given the level reached by Iranian oil exports last year, close to two million barrels per day, even exceeding that threshold in September and November. These volumes are comparable to the peaks observed under the Biden administration, despite its rhetoric of maximum pressure sanctions. Addressing the Iranian challenge therefore means acting on its main economic lifeline: oil. Since the European boycott of 2011–2012, China has become the primary buyer of Iranian crude. Between 80% and 90% of Iran’s exports from the Persian Gulf now flow to Beijing. This dependence makes China a central, if not decisive, actor in the economic resilience of the Islamic Republic. Ironically, however, Beijing still imports even more oil from the Arab petro-monarchies than from Tehran.

Isolationist critics, for their part, highlight the rising costs of such an engagement. In their view, U.S. ships deployed in the region are wearing down, missile interceptors are becoming scarce, and, in the end, Washington risks becoming trapped in a new spiral of commitments without having decisively intimidated Beijing. This reading is, however, considered reductive by Behnam Ben Taleblu. If one takes a step back and considers the facts, U.S. success against the weakest links of the “Axis of Aggressors” is far from negligible. In Venezuela, a once firmly aligned

regime has been weakened; in Iran, the combined pressure of sanctions and isolation is weighing on already strained structures.

This constrained setback, in turn, forces China to reassess its strategic calculations, weakening certain external nodes of influence. Rather than a mere cost, this dynamic can therefore be interpreted as an instrument of extended deterrence. By weakening Beijing's peripheral allies, Washington is acting on the structural conditions of its power. A discreet success, almost silent, but one capable of durably reshaping the balance of power among major powers.

The Gulf Countries at the Heart of the Great Realignment

The current war has triggered a rapid repositioning of the Gulf monarchies vis-à-vis Israel and the United States. Paradoxically, this strategic shift could help shield the region from a broader collapse.

This dynamic also opens a far more promising future for the Gulf Cooperation Council (GCC). It is rooted in an accelerated awareness shaped by historical lessons. The Napoleonic precedent highlights a geopolitical constant: imperial powers consolidate during periods of rupture, when external pressure forces a rapid reconfiguration of balances. In 2020, such an evolution would have been unthinkable in open terms. Today, however, the context has changed profoundly. More assertive political imperatives are emerging, driven by social upheavals and pressing economic constraints. Yet the decisive factor remains security. These dynamics unfold in a Middle East marked by a relative U.S. retrenchment, as Washington seeks to reduce its direct footprint. In this context, it falls to regional states to structure themselves into coalitions capable of addressing shared threats.

Of course, ideologies, history, and regional divisions continue to weigh heavily. But a superpower must also be able to guide its allies, especially when preparing a form of strategic withdrawal by fostering the cohesion of a regional bloc. The current Iranian threat provides precisely this valuable, almost providential, margin for maneuver. However, trajectories remain differentiated, and each country reacts at its own pace. Saudi Arabia does not follow exactly the same priorities as the rest of the GCC or other countries in the Arab and Muslim world. Indonesia, for instance, did not react after October 7, unlike Riyadh, which faces stronger demographic and domestic political constraints. Normalization with Israel will therefore unfold in a differentiated manner depending on local contexts, while being underpinned by a shared security logic: the gradual integration of Israel into a U.S.-aligned regional order, initiated first through the Gulf before expanding more broadly.