

Between Collapse and Deal: Iran's Revolt, Geopolitical Fear, and the Illusion of Negotiation

With the new uprising of Iranian society against the theocratic-security regime, the unprecedented violent repression resulting in the deaths of tens of thousands of protesters, and the [concentration](#) of U.S. military assets around the country, Iran is entering a period of profound uncertainty.

It now seems that the question is no longer whether or not the Islamic Republic will survive, but rather how much violence it will be able to deploy and for how long.

The regime has never been as weak as it is today since its establishment in 1979; this is widely [acknowledged](#) from U.S. Secretary of State Marco

Rubio to regional experts. Its legitimacy within the population has never been [so low](#). The regime appears to have retaken control of the streets through unprecedented and ostentatious violence, [massacring](#) nearly 30,000 people, but it has lost its sense of purpose, its capacity for persuasion, and now governs solely through fear and violence. It now seems that the question is no longer whether or not the Islamic Republic will survive, but rather how much violence it will be able to deploy and for how long. The regime's survival will also hinge upon decisions taken by the United States and its regional ally, Israel: will they decide that the fruit is ripe enough to fall, or will they continue to squeeze it while keeping it on the tree, even if that means extending the agony of the Iranian people?

The countries of the South Caucasus will be affected, albeit unevenly, by the changes that will in-



THORNIKE GORDADZE
Contributor

Thornike Gordadze, a Franco-Georgian academic and former State Minister for European and Euro-Atlantic Integration in Georgia (2010-12), served as the Chief Negotiator for Georgia on the Association Agreement and Deep and Comprehensive Free Trade Agreement (DCFTA) with the EU. From 2014 to 2020, he led the Research and Studies Department at the Institute for Higher National Defense Studies in Paris. A Senior Fellow at the International Institute for Strategic Studies (IISS) from 2021 to 2022, he currently teaches at Sciences Po in Paris and is an Eastern Neighbourhood and Black Sea program fellow at the Jacques Delors Institute. Gordadze, also a Senior Researcher at the research institute Gnomon Wise, holds a PhD in Political Science from Sciences Po Paris (2005).



evitably unfold in Iran. These changes may follow several different scenarios, which will determine how Georgia, Armenia, and Azerbaijan are impacted. This multi-variable equation will also depend upon the influence and behavior of regional actors such as Türkiye, Russia, the EU, and the United States. In short, following the turbulence triggered by the war in Ukraine, upheavals in Iran may bring a new series of shocks that could reshape regional balances.

Hope Dies Last

Shortly after the wild repression of Tiananmen Square in June 1989, the French President François Mitterrand [declared](#) that a regime that opens fire on its own youth has no future. Skeptics today argue that the Chinese Communist regime not only survived but has since become the world's second-largest power, challenging American economic and political hegemony. This is a sad truth. Just as Vladimir Putin's regime has managed to navigate several waves of protest, there are many examples of the resilience of authoritarian regimes.

Yet the Iranian case still offers grounds for cautious hope. Few countries have witnessed such a large share of their population repeatedly engage in sustained struggles for freedom: from the Green Movement of 2009, through Bloody Aban in November 2019, to the "Women, Life, Freedom" movement of 2022, and most recently the January 2026 uprising.

After each wave of repression, Iranians have re-emerged with renewed energy against the military-theocratic regime of the Ayatollahs and the Pasdaran.

In contrast to China and Russia, where pro-democracy movements never recovered after the brutal suppression of Tiananmen Square and the gradual exhaustion of the Bolotnaya [protests](#) in Moscow

in 2011-2012, the Iranian public has returned to the streets with remarkable resilience. After each wave of repression, Iranians have re-emerged with renewed energy against the military-theocratic regime of the Ayatollahs and the Pasdaran.

Today, Iran arguably has the most pro-Western and pro-democracy population in the region. It is also among the most secular societies in the Middle East and one of the most openly opposed to the political instrumentalization of Islam. These internal dynamics are reinforced by a large, wealthy, and well-educated Iranian diaspora, whose global networks and influential media platforms further strengthen the prospects for long-term change.

Past the Breaking Point: Is Iran Beyond Reversal?

For Europeans, this is not merely another Iranian crisis, but a genuine point of no return.

The [events](#) of January 2026 may represent a further step forward or even an irreversible rupture. Proof of this is that even French diplomacy, always ready to capitalize on rifts between autocrats and democratic countries in order to be the sole Western actor to "maintain dialogue," has judged its resistance to designating the Islamic Revolutionary Guard Corps (IRGC) as a terrorist organization to be untenable and has aligned itself with the decision of the EU Council. This suggests that, for Europeans, this is not merely another Iranian crisis, but a genuine point of no return. The level of violence was so unprecedented that the regime may have permanently lost its legitimacy in the eyes of the majority of the population. Unlike the "Women, Life, Freedom" movement, in which most protesters were young people or members of educated social groups, the uprising of last January was far more socially diverse and articulated demands that were both more radical and broader. The fact

that the revolt began with the bazaaris of Tehran's Alaeddin market allows for a parallel to be drawn with the two other successful revolutions in Iranian history: the Persian Constitutional Revolution of 1906-1909 and the Islamic Revolution of 1979.

Even if some express reservations about the Crown Prince and his life in exile, it is evident that no leader can emerge from within the country without running a near-certain risk of being eliminated by the regime.

Moreover, for the first time, the protesters have rallied around an alternative figure, a leader who had been sorely lacking in previous protest movements: Crown Prince of Iran Reza Pahlavi. His candidacy is far from beyond criticism; first and foremost, because he has not lived in Iran since early childhood. Nevertheless, his involvement in the movement and the rather unexpected level of popular support he has received have clearly made the regime more vulnerable, which helps to explain the unprecedented degree of violence used to re-impose terror. Even if some express reservations about the Crown Prince and his life in exile, it is evident that no leader can emerge from within the country without running a near-certain risk of being eliminated by the regime.

The key difference from previous uprisings is that the regime now appears particularly weakened. It is weakened internally in terms of legitimacy, as noted earlier, as well as economically and socially. It bears recalling that the unrest began among mobile telephone merchants and sellers of accessories and goods, largely imported through smuggling networks and purchased in dollars across the Persian Gulf. The [collapse](#) of the exchange rate by more than 50% since the “twelve-day war” last June (compounded by a deep sense of injustice, as regime insiders benefit from a preferential state-set exchange rate), [rampant inflation](#) (with an of-

ficial annual rate of 42% in 2025 and over 70% for food products alone), the state's [inability](#) to provide basic services such as 24-hour access to water and electricity, and the glaring injustices stemming from the capture of 40 to 60% of the economy by senior officers of the IRGC have all contributed to this fragility.

Externally, the regime has become more vulnerable than ever. Since 7 October 2023, the Middle East has been profoundly destabilized. The so-called “Axis of Resistance,” the network of proxy militias established by Tehran, has been severely weakened by Israeli military action: Hezbollah and Hamas, although not eliminated, have been badly battered, while former Sunni jihadists from Hayat Tahrir al-Sham (HTS) have taken power in Syria, toppling Bashar al-Assad, the central pillar of the pro-Iranian axis. The importance of Hezbollah for Iran can hardly be overstated, as it has effectively acted for nearly 40 years less in the interests of Lebanon than as a strategic shield for Iran itself. It is, therefore, no coincidence that Hezbollah has been gravely weakened for the first time since its creation and that Iran itself has been attacked on its own soil at this level of intensity for the first time since the establishment of the militia.

In addition to Iran's failure in the proxy war with Israel, the “twelve-day war” in June and the Israeli and American air strikes significantly weakened the regime. This conflict, which resulted in the elimination of numerous Iranian military and security leaders, nuclear scientists, the substantial destruction of air defense systems, and serious damage to Iran's nuclear program, revealed the extent of Iran's vulnerability and the degree to which even its highest levels of command are permeable to infiltration.

Even if the [much-discussed](#) 400 kilograms of uranium enriched to over 60% remain intact, the infrastructure required to build a nuclear weapon has been severely damaged and would require a

significant period of time to be rebuilt. The deployment a few months later of what Donald Trump [described](#) as a “beautiful armada floating toward Iran,” namely, a carrier strike group soon to be joined by a second, combined with the policy of maximum pressure, has fostered among those seeking the end of the Iranian regime a sense that a historic opportunity may be emerging.

The Friends and Enemies Who Keep the Regime Alive

This does not mean that the regime has no supporters, nor that it will fall easily. Paradoxically, the regime is more supported, more accurately, “sustained” from the outside than from within. Inside Iran, the regime’s direct beneficiaries, namely, a significant portion of the clerical class, members of the ideological armed forces (the IRGC), and the paramilitary militias tasked with regime security (the Basij), form the hard core that will defend the Islamic Republic to the very end. Some segments of society that had previously supported the regime passively, out of fear of chaos or war, drawing upon memories of the long and deadly conflict with Iraq in the 1980s or of civil wars in countries such as Syria, Afghanistan, Iraq, Lebanon, or Yemen, are now harboring serious doubts as it is increasingly the preservation of the regime itself that appears to be the primary source of instability and chaos.

Externally, Iran is widely feared, but its fall is desired by few. First, the regime is supported by its allies in what may be called the “triangle of revenge” – China and Russia. China [purchases](#) more than 80% of Iran’s oil, averaging 1.38 million barrels per day, acting as the country’s economic lifeline and the regime’s main source of revenue. China also provides military support and [supplies](#) modern surveillance and repression technologies widely used by the regime. Beijing invited Iran to join the Shanghai Cooperation Organization in 2023 and supported its application to BRICS+ in

2024. China will likely do everything possible to prevent the regime’s collapse, primarily to safeguard its energy supplies.

Iran constitutes a key component of the alternative international order that China and Russia began to construct more than two decades ago; within multilateral frameworks and particularly in Beijing’s efforts to expand its influence over international organizations, Iran has proven to be a valuable ally, as illustrated most clearly by its role in the UN Human Rights Council several years ago.

Russia, for its part, is Iran’s main arms supplier and a key partner in the nuclear field. Ties between Tehran and Moscow tightened after the outbreak of the Syrian civil war and even more so following Russia’s full-scale invasion of Ukraine. Stymied by fierce Ukrainian resistance, Russia became bogged down in a prolonged war of attrition and developed a strong need for Iranian drones, supplied in the thousands, as well as for the [establishment](#) of serial drone production on Russian territory. Iranian military personnel were even [dispatched](#) to Russia and to occupied Ukrainian territories (for the first time outside the Middle East) to train Russian forces in the use of these drones. The Kremlin has also come to appreciate the value of its Iranian partner and its expertise in [operating](#) a “shadow fleet” following EU and U.S. restrictions. Indeed, Iran’s long experience served as a model for Russia in developing its strategy to circumvent international sanctions.

More surprisingly, however, some regional actors, rivals, or even declared enemies of Iran do not presently appear to desire a rapid end to the Islamic Republic. The Sunni monarchies of the Gulf: Saudi Arabia, Qatar, and the United Arab Emirates, as well as Türkiye, Jordan, and others, have never held Iran in high regard. Saudi King Abdullah had even advised the Americans to attack Iran on several occasions and “cut off the head of the snake,” as [revealed](#) by WikiLeaks. Yet in recent years, these

same actors have actively sought to prevent a potential U.S. operation against Tehran.

The official reason invoked is fear of Iranian ballistic retaliation against strategic sites: military bases, oil and gas infrastructure, and of massive refugee flows from Iran flooding neighboring countries, with Syria often cited as a precedent. For this reason, these states have refused to allow the United States to use their territories as rear bases for an attack against the Islamic Republic.

It is highly likely that these stated reasons are secondary to more important and less openly acknowledged factors. In the event of a regime change that reintegrates a democratic Iran into the international community, with partnership or even alliance relations with Europe and the United States, the region's authoritarian regimes would face the risk of democratic contagion among their own populations. This is their fundamental and primary fear. Iran, a country of over 90 million people with a well-trained and highly educated population, better educated than most neighboring Arab countries, not to mention Central and South Asia, could easily become the dominant power in the region.

The lifting of sanctions would open Iran's market to foreign investment and give international markets access to its oil and gas, driving down prices and reducing revenues for other exporting countries, many of which are heavily dependent upon hydrocarbon income. A weak Iran, ostracized internationally, sustaining its economy through smuggling and parking its illicit funds in regional financial hubs (primarily Dubai), even under the rule of the ayatollahs, who have long since abandoned Ruhollah Khomeini's original ambition of exporting the Islamic Revolution and now focus above all on preserving their own regime, is ultimately more desirable for its neighbors than a democratic, free Iran allied with the West or with Israel.

Israel's position on regime change in Iran is more ambiguous than its long-standing hostility toward the Islamic Republic might suggest. While Tehran has made opposition to Israel's existence and the "liberation" of Jerusalem central to its ideological legitimacy, recent signals indicate that Israel has at times put the brakes on direct U.S. military action against Iran. Beyond the obvious fear of Iranian ballistic retaliation, this hesitation may reflect a deeper strategic calculation. A post-Islamic Republic Iran that is democratic, economically reintegrated, and closely aligned with the West could, over time, emerge as a powerful regional actor capable of challenging Israel's relative supremacy. From this perspective, a weak, internally fragmented Iran, potentially divided along ethnic lines among Kurds, Azeris, Balochs, and others, and amenable to tactical alignments with smaller factions, may appear more manageable to Israeli strategists.

Ultimately, Israel's core objectives are not regime change per se, but the elimination of Iran's nuclear program, the destruction or strict limitation of its ballistic missile capabilities, and an end to Tehran's support for proxy forces such as Hezbollah, Hamas, and the Houthis. If these goals can be achieved through a weakened and constrained Iran, that outcome may be seen in Tel Aviv as preferable to the rise of a strong, stable, and prosperous Iran that could compete with Israel for regional influence.

If faced with a choice between managing long-term competition with a potentially resurgent Iran and supporting decisive U.S. military action to irreversibly degrade the regime, Israel may opt for the latter, even at the cost of short-term escalation.

That said, Israel may ultimately conclude that the current moment represents a rare historical opportunity, either to eliminate the Islamic Republic altogether or to weaken it beyond recovery. If faced with a choice between managing long-term competition with a potentially resurgent Iran and supporting decisive U.S. military action to irreversibly degrade the regime, Israel may opt for the latter, even at the cost of short-term escalation.

Trump and Iran: Between Deal, Force, and the Need for Victory

Donald Trump's approach to Iran is less a coherent strategy than a shifting equilibrium between intimidation, ad-hoc decision-making, and personal political calculation. The question that has long preoccupied diplomats, analysts, and allies alike—war or no war?—may never receive a clear answer, in part because Trump himself is unlikely to know it until the final moment. What is evident, however, is the driving force behind his policy: neither ideology nor democracy promotion and certainly not concern for the Iranian people, but the pursuit of a highly visible, easily sellable political win.

From the outset, Trump sent contradictory signals. He publicly [told](#) Iranians that American aid was coming and that Washington stood with them, statements that helped fuel internal unrest and raised expectations among dissidents. Yet, these declarations were never followed by a concrete commitment to regime change or democratic transition. Almost immediately afterward, Trump escalated militarily, dispatching what he famously called a “beautiful armada” to the region and [threatening](#) Iran with attacks “far worse than in June.” At the same time, he authorized backchannel and open [negotiations](#) in Muscat. The coexistence of threats and diplomacy was not accidental; it was pressure as performance.

Trump does not care about freedom or democracy

in Iran. His record shows he is perfectly comfortable dealing with dictators and authoritarian rulers and, in many cases, prefers them. They offer clarity, centralized power, and the possibility of quick deals. What Trump wants above all is a result he can frame as a personal success. Substance matters only insofar as it supports the narrative that he achieved something historic, something no one else, especially Barack Obama, could.

This is why Trump's ideal outcome is a deal that looks better than the Joint Comprehensive Plan of Action ([JCPOA](#)). He does not need a perfect agreement; he needs one that allows him to say he outperformed Obama. Maximum pressure, crippling sanctions, military deployments, and relentless rhetoric are the tools he uses to achieve this result. If Iran were to agree to a complete halt of its nuclear program, Trump would already consider this a triumph. If, in addition, Tehran accepted meaningful limitations on its ballistic missile program and curtailed support for its regional proxies, such as Hezbollah, the Houthis, Iraqi Shiite militias, and Hamas, demands strongly backed by Israel, Trump would present it as the greatest diplomatic victory in modern history.

Negotiating with Iran: A Fool's Game

Negotiating with the Iranian regime is, by nature, a hopeless venture. It cannot be honest, symmetrical, or durable because the two sides' objectives are fundamentally incompatible.

Negotiating with the Iranian regime is, by nature, a hopeless venture. It cannot be honest, symmetrical, or durable because the two sides' objectives are fundamentally incompatible. Tehran negotiates to survive, Washington negotiates to obtain commitments. These logics do not meet. They col-

lide, and the result is illusion, delay, and eventual rupture.

The Iranian authorities are backed into a corner. Sanctions, internal unrest, economic collapse, and growing regional vulnerability leave them with one overriding priority: saving the regime and buying time. In that context, they are ready to say almost anything at the negotiating table. Promises regarding the nuclear program are the easiest currency. Tehran can propose a “total stop” or the evacuation of enriched uranium stockpiles to a third country, conveniently Russia, another self-proclaimed “responsible actor” of international relations. These offers are designed to appear historical while remaining reversible and opaque.

Beyond nuclear concessions, the Iranians reportedly float something far more seductive to Trump’s transactional mind: business. Oil contracts, Iran’s automotive industry, real estate development, access to a large consumer market, and proposals allegedly aimed at figures like Steve Witkoff or Jared Kushner. For Donald Trump, this may look like proof that pressure works and that he has forced Iran to the table. He may even believe he has struck a great deal.

The problem is structural. Trump wants to cut deals with actors who do not respect deals and who define themselves through permanent hostility to the West. For the Iranian regime, the United States and Israel are not just adversaries; they are “consubstantial enemies,” essential to the regime’s ideological legitimacy and internal cohesion. The Islamic Republic is by its auto-definition a regime of virtue combatting the Evil: *Shaytan-e Bozorg*, the Great Satan (U.S.) and *Shaytan-e Kuchak*, the Little Satan (Israel). And for the Islamic Republic, these are not metaphorical categories, but rather real and analytical ones. Without them, the regime loses its justification for existence and repression. The January protests, crushed with extreme violence, were officially [described](#) by regime pro-

paganda as the “thirteenth day of the twelve-day war.” Thousands of Iranians were arrested on absurd charges of espionage for the U.S. and Israel. In this context, any genuine deal with Washington is politically suicidal for the regime. It cannot be sold to the population without undermining the regime’s own narrative.

This is why the three main U.S.-Israeli demands on the negotiation table (nuclear program, ballistics, and proxies) are existentially unacceptable to Tehran. Renouncing the nuclear program may prolong the regime’s life, but only temporarily. Iranian leaders constantly invoke Libya and Muammar Gaddafi, who abandoned his nuclear ambitions only to be overthrown later. A non-nuclear Iran is, in their eyes, a far easier target. The same logic applies to ballistic missiles: without medium- and long-range capabilities, Iran becomes vulnerable, particularly to Israel, which could strike at will.

Most crucially, Iran’s regional proxies are not optional. Hezbollah, the Houthis, Hamas, and Iraqi Shiite militias are not merely allies or ideological partners; they are extensions of the IRGC, forward military bases beyond Iran’s borders. They deter Israel, threaten maritime routes, harass U.S. forces, and can be redeployed internally. Witnesses from January report that some of the worst massacres, committed with heavy machine guns known in the Middle East as *Dushkas*, were carried out by these very proxies brought in to repress Iranian civilians.

Negotiating under these conditions means missing a historic opportunity to side with the Iranian people. An Iranian friend told me that while all authoritarian states of the region were rushing to save the dying Ayatollahs’ regime, the Free World and its leader were unable to help their natural ally, Iranian society. Any deal will be tactical, temporary, and broken as soon as one party finds it convenient. In the meantime, Iranians will feel betrayed and abandoned, once again sacrificed to

the illusion that this regime can be bargained with rather than confronted for what it is.

But What If He Gets Nothing?

Trump cannot afford a total failure. Losing credibility, especially after months of escalation, would undermine his image of strength at home and abroad. In that scenario, a military option becomes likely, not necessarily because Trump wants war, but because he cannot appear to retreat. Yet, such a military action would be limited by design. The forces the United States has gathered in the region are insufficient for a prolonged campaign aimed at total regime destruction or occupation. Trump knows that American public opinion is deeply hostile to foreign military interventions. His own MAGA base is particularly opposed to “endless wars,” and a conflict that spirals out of control would weaken him politically, especially ahead of midterm elections.

Trump cannot afford a total failure. Losing credibility, especially after months of escalation, would undermine his image of strength at home and abroad. In that scenario, a military option becomes likely, not necessarily because Trump wants war, but because he cannot appear to retreat.

Trump is also constrained by his relationships with Gulf leaders. While the United States no longer depends on Gulf oil, thanks to domestic production and alternative sources such as Venezuelan oil, it still depends on the massive investments

these states have promised to pour into the American economy. These “trillions” matter more to him than regional democratization or long-term stability. As a result, he will not move against their core interests.

The most Trump is likely to do, if negotiations fail, is to authorize targeted strikes, possibly in coordination with Israeli aviation, against key strategic assets of the Islamic Republic. These could include missile depots, remaining nuclear facilities, centers of political and military decision-making, and potentially even an attempt to eliminate Supreme Leader Ali Khamenei. Such strikes would aim to weaken the regime, restore American deterrence, and embolden internal dissent. They would, however, not be sufficient to trigger rapid regime change.

Some analysts argue that Trump might contemplate a “Venezuelan scenario” applied to Iran: decapitating the top of the regime without fully dismantling the system and then seeking a new *modus vivendi*. In this model, Khamenei would serve as the expendable figure while the IRGC could remain as the backbone of power, much like the Chavista apparatus that still dominates Venezuela after leadership transitions. The IRGC, pragmatic and survival-oriented, might accept such an outcome if it ensured institutional continuity and relief from economic strangulation.

Trump’s Iran policy is driven less by strategy or ethics than by optics. War is not the goal, but peace is valuable only insofar as it looks like victory—and any such victory must be unmistakably his ■