



By: [Stephen Holmes](#)

America cannot end the war without pragmatic dealmakers in Tehran



A senior US State Department official recently summarized the Trump administration's approach to regime change in three words: "decapitate and delegate."

Remove an intransigent leader, **weaken the regime through airstrikes**, sanctions, and proxies, then compel a successor to strike a transactional bargain – eliminating a geopolitical irritant while opening the door to diplomatic normalization, oil access, and, in the case of Iran, nuclear concessions.

The strategy appears straightforward. But it contains a fatal contradiction: the same military pressure meant to force a country into a deal risks destroying the political authority required to sign one.

President Donald Trump has repeatedly suggested that what happened in Venezuela earlier this year would be the "perfect scenario" for Iran.

But the Venezuela model has an essential precondition. It requires a successor government capable of acting on the state's behalf.

Someone must possess the institutional authority and domestic legitimacy to bear the political cost of accommodation with Washington – and, harder still, to compel compliance from those who regard any accommodation as betrayal.

Ten days into Operation Epic Fury, that precondition is rapidly eroding. It is being undermined not only by the military campaign itself but also by the strategic incentives facing the other actors in the conflict.

Negotiating peace

America's closest regional ally, Israel, and its principal adversary, Iran, are pursuing different objectives. Yet both are converging on the same outcome: the fragmentation of Iranian state authority.

That convergence is not incidental. It is

structural, producing an Iran that is simultaneously more dangerous and less capable of striking a deal.

The reason is simple: negotiating peace requires far more political organization than causing disruption.

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To sign an agreement, reopen oil markets, and normalize relations, Iran must act as a unified sovereign. But to disrupt global energy flows, it needs only dispersed operational capacity.

Military pressure pushes Iran toward dispersal of authority. That may reduce its capacity to conduct large, coordinated operations that inflict concentrated harm.

But fragmented authority may produce something more insidious: a chronic threat with no return address.

The same fragmentation that eliminates the need for approval to strike, say, Gulf infrastructure permits no authority to halt such strikes.

Iran's survival strategy

Israel's strategic incentives reinforce this dynamic. For the Israelis, an Iran stripped of unified command – unable to coordinate major offensive operations across its military and proxy networks – already satisfies its primary security requirement.

A fragmented adversary is easier to contain than a cohesive one. Preserving the institutional coherence necessary for diplomacy is therefore not Israel's priority.

The Islamic Republic's own survival strategy pushes in the same direction. The Islamic Revolutionary Guard Corps has long prepared

for leadership decapitation through what it calls “mosaic defense,” dispersing command authority to provincial units capable of operating autonomously if central leadership is destroyed.

But the structure that makes the regime hard to eliminate militarily also makes it incapable of negotiating or surrendering politically.

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A pre-planned escalation concept – sometimes described as “Operation Madman” – envisioned widening the conflict by targeting not only US bases but also Gulf states' economic assets, calculating that the political and economic costs of regional instability would eventually outpace American resolve.

“We know America is extremely worried about a regional war,” a senior **Iranian parliamentary adviser explained**. “Our plan is to expand the war's reach.”

Iran does not need to win the war militarily. It needs only to survive long enough for the political and economic costs of regional instability to pile up.

The results are already visible. Within a week, tanker traffic through the Strait of Hormuz – which accounts for roughly one-fifth of the world's oil – **fell by 90%**.

Dubai's international airport, the world's busiest, effectively shut down. European **jet-fuel prices jumped** 72%, nearing their 2022 peak after Russia's invasion of Ukraine.

Qatar halted liquefied natural gas production. Each additional week of instability increases the pressure on America's allies – and on a Republican Party facing congressional elections with gasoline prices rising at the

pump.

Producing a negotiating partner

Meanwhile, Iran's internal political structure is becoming less capable of producing a negotiating partner.

When President Masoud Pezeshkian reportedly extended a genuine overture to Gulf neighbors, Iranian hardliners quickly undercut him – and Trump obligingly finished the job, taking to Truth Social to celebrate Iran's “humiliating surrender.”

The man who most needed a pragmatist to survive in Tehran destroyed whatever domestic cover the pragmatist had left.

Kurdish dynamics add a further centrifugal force. Trump initially called **Kurdish involvement** “wonderful,” only to reverse course abruptly after Iraqi Kurdish leaders complained that CIA efforts to arm their fighters were making them a target for Iranian retaliation.

Stand down, Trump told them, because “the war is complicated enough as it is.”



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Groups that remember Trump's 2019 abandonment of Syria's Kurds, who had fought alongside US forces against ISIS, will not commit their fighters to America's unspecified and shifting war aims.

The opening phase of the war also eliminated many of the figures Washington quietly regarded as potential interlocutors – senior Iranian officials believed to be pragmatic dealmakers.

Trump himself acknowledged this with unusual candor: “Most of the people we had in mind are dead.” The decapitation was so successful that it eliminated the strategy’s own precondition.

A successor has now been named: **Mojtaba Khamenei**, son of the slain supreme leader.

That the Islamic Republic – founded explicitly on rejection of dynastic rule – has resorted to hereditary succession speaks volumes.

The institutional machinery of succession has been bent to produce a result under emergency conditions. Israel has already declared him an immediate target for elimination. Choosing supreme leaders now amounts to assembling a targeting queue.

“Decapitate and delegate” works only if the decapitation is precise enough to leave behind someone capable of receiving the terms.

The policy requires an Iran weak enough to accede to American demands yet coherent enough to implement them.

But Israel’s existential interest in permanently fragmenting Iranian state power, Iran’s decentralized defense structure, and the consolidation of authority around institutions whose entire *raison d’être* is holding the world’s energy markets hostage are producing an Iran that is neither.

Iran needs far less organizational coherence to continue disrupting the world than it needs to halt the decentralized offensive operations it has already set in motion.

The US may succeed in weakening Iran militarily while destroying the one thing needed to end the conflict: an Iranian state capable of making – and enforcing – a deal.

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