Analyses OSW

CENTRE FOR EASTERN STUDIES 2.03.2026 www.osw.waw.pl

US and Israeli strikes on Iran: an attempt to engineer regime change

Zespół OSW

On 28 February, the armed forces of the United States and Israel launched a large-scale campaign of air strikes against Iran, codenamed Operation Epic Fury by the Pentagon and Lion's Roar by the Israel Defense Forces. Its stated objective is to dismantle Iran's nuclear infrastructure, missile arsenal, and broader military capabilities, with the ultimate aim of precipitating the collapse of the political regime in Tehran. So far, the strikes have focused on destroying Iran's military assets and decapitating the country's political and military leadership, including Supreme Leader Ali Khamenei and a number of senior commanders of the Islamic Revolutionary Guard Corps.

Iran responded with missile and drone attacks against US bases in the region, as well as military and civilian targets in Israel and the Gulf states. At this stage, the military superiority of the United States and Israel over Iran is overwhelming. However, this has not resulted in the total destruction of Iran's defensive capabilities, or in the complete erosion and breakdown of the state apparatus at the personnel level. The formal process of filling vacancies within the Iranian security agencies is proceeding smoothly. An accelerated succession process for the position of Supreme Leader has also been initiated. No large-scale public protests have taken place thus far.

The prospects for a political resolution to the conflict remain minimal at this stage. The Iranian government is unwilling to make political concessions or engage in dialogue, viewing the attack as an existential threat. It is therefore likely to prolong the conflict, thereby raising its costs for the United States and the Gulf states, while seeking to generate international pressure to halt the hostilities. The United States, for its part, expects the ongoing campaign to fracture the Iranian elite and spark public protests. President Donald Trump himself wants a short-lived and successful conflict that would strengthen his political standing. Meanwhile, Israel is seeking to overthrow the Iranian regime and to degrade its military and technological capabilities to the greatest extent possible. US-Israeli strikes are likely to continue, alongside efforts to deepen fragmentation and divisions within the Iranian elite and to stimulate protest movements within the country.

The United States at war with Iran: eliminating the problem

The primary stated objective of the US attack is to dismantle Iran's nuclear programme, missile arsenal, and network of support for armed and terrorist organisations that threaten US interests and allies in the region. For the Trump administration, the military operation

represents an attempt to resolve a five-decade-old problem that has absorbed considerable attention and resources, most recently requiring the United States to support Israel during the twelve-day war in June 2025. Washington concluded that its attempts at dialogue with Iran, including those undertaken between April and June 2025 and again in February of this year, were futile and incapable of producing a comprehensive resolution. The attack on Iran is therefore intended to facilitate a sustained reduction in US engagement in the Middle East.

Washington's political objective is to compel the Iranian regime to accept an outcome favourable to the United States or, ideally, to bring about a transformation of Iran's political system. However, it seeks to ensure that any such transformation is driven by Iranians themselves, without a sustained US military presence and with only limited interference in the political process. This is precisely what Trump suggested in a brief video address delivered shortly after the launch of the military operation. In this manner, the White House seeks to avoid prolonged entanglement in the conflict while preserving an exit option should efforts to overthrow the regime fail.

From the perspective of US domestic politics, it is crucial that the conflict proves short-lived (Trump has referred to a four-week timeframe) and that its outcome can be framed as a success for the Trump administration. The intervention in Iran currently lacks public support in the United States, with only 27 per cent of respondents in a Reuters/Ipsos poll expressing approval. It also runs counter to the president's campaign pledges. However, a successful outcome could significantly alter this assessment, as was the case with the intervention in Venezuela earlier this year. The Democrats have already begun preparations to capitalise on any potential complications arising in the course of the Iranian operation. Congress is set to vote on a resolution aimed at blocking any further military action not authorised by the legislative branch. This would not, in practice, constrain the president, as he could veto the resolution; however, it would compel Republican lawmakers to adopt a clear position on Iran.

Israel: pursuing a strategic objective

The United States' decision to join Israel in the war against Iran has fulfilled an objective pursued by Prime Minister Benjamin Netanyahu for the past three decades. He has consistently portrayed Iran as an 'existential' threat to the Jewish state, arguing that armed intervention was the only viable means of eliminating it. The Israeli leader has spent much of his political career seeking to persuade the American political establishment that military action against Iran was necessary, deploying all the instruments at his state's disposal. The prospect of Iran acquiring nuclear weapons now appears to serve merely as a pretext for successive Israeli operations. At present, Israel itself is the only nuclear-armed state in the Middle East, with an arsenal estimated at several hundred warheads.

Israeli actions appear to be driven primarily by other factors: Iran's hostile regional policy, notably its support for organisations such as Hezbollah and Hamas; concern over the Islamic Republic's growing military capabilities, particularly the development of its ballistic missile programme; Israel's doctrine of preventing any state in the region from acquiring nuclear weapons or even the capability to develop them; and its pursuit of regional hegemony, which in turn requires weakening, and ideally fragmenting, any actors

possessing substantial power. For Netanyahu, the Iranian threat has served as effective electoral capital for two decades. A successful outcome of the current operation would improve his chances of victory in this year's parliamentary elections.

For Israel, therefore, the aim of the war is to overthrow the Iranian regime and to degrade its military and technological capabilities as far as possible. It also appears that Israel is not interested in a successful political transformation of Iran, but rather the opposite – its profound weakening, and potentially even its disintegration, for example along ethnic lines. With the region's largest and well-educated population, abundant natural resources, a rich culture and far-reaching political ambitions, Iran would remain a challenge for Israel regardless of the nature of the regime in Tehran. Hence, even in a scenario involving a change of power in Iran, Israel is unlikely to regard its mission as 'accomplished'.

Military objectives of the US-Israeli operation

On 28 February, in fewer than 12 hours, US-Israeli forces carried out more strikes on Iran than during the entire twelve-day war in June 2025 (approximately 1,100), maintaining operational tempo over the following 36 hours. **This makes it the most intensive air campaign globally since 2003.** The strikes have been conducted from two principal axes: from Iraq, by Israel with US support, and from the Persian Gulf and the Arabian Sea, by the United States.

The strikes have been primarily aimed at destabilising the state's governing system through the decapitation of its political-religious and military leadership, depriving Iran of the ability to mount an effective military response and, in the longer term, eradicating its nuclear programme. Israeli strikes have focused on personnel targets in Tehran and on the large-scale destruction of Iran's ballistic missile systems and air defence assets in the western part of the country. US strikes have been concentrated along the Iranian coastline, targeting ballistic missile launchers, naval units, and maritime reconnaissance and strike systems. The US military has also conducted strikes deep inside the country against personnel targets and infrastructure associated with ballistic missile production. Iran's command and control system appears to have been severely disrupted; however, individual military formations continue to operate, at least in part independently, carrying out uncoordinated actions on their own initiative.

Iran's response, although conducted on a large scale and unprecedented in scope, has so far proved militarily ineffective. Iran's armed forces have been unable to mount effective resistance or counter US and Israeli air strikes. Iranian attacks targeting locations across 11 countries (Saudi Arabia, Bahrain, Cyprus, Iraq, Israel, Jordan, Qatar, Kuwait, Oman, Syria, and the United Arab Emirates) have failed to cause mass casualties or significant destruction – a total of 20 people have been killed, including three US soldiers and 12 Israeli civilians. Iran's retaliation has primarily focused on Israel and US military installations in the region, and to a lesser extent on sensitive and symbolic sites linked to tourism and business in the Gulf states. Iranian missile strikes maintained their intensity on the second day of the war, although they were less coordinated. On the first day, the Gulf states and Israel intercepted almost all Iranian missile attacks. On the second day, the effectiveness of their air defence systems declined.

Iran – a struggle for survival

Facing US and Israeli attacks, Iran is in the midst of a profound political, social, economic, and security crisis, which has intensified following the mass protests in January this year and the subsequent violent crackdown. The Iranian regime views the ongoing attacks as an existential threat, both to its own survival and to the sovereignty of the state. Beyond harsh rhetoric, it has responded by targeting US and Israeli military assets within its operational range and by striking sites, including civilian targets, in the Gulf states. These actions are intended to raise the costs of the conflict and generate international pressure to halt the hostilities. However, they may produce the opposite effect. Rather than creating pressure for de-escalation, they could prompt the Arab states to launch their own strikes against targets on Iranian territory, although this scenario currently appears unlikely.

The regime has sought to demonstrate the strength and cohesion of the state in order to deter its adversaries, primarily the United States, from pursuing maximalist objectives in the war. Iranian actions over the first two days can be regarded as relatively effective, particularly in terms of the demonstrated cohesion of the elite, the efficient replacement of eliminated officials, including the initiation of a rapid succession process following the death of Ali Khamenei, and the absence of public protests. Given the nature of the system and years of preparatory measures, it is reasonable to assume that Iran's armed forces and political centres of power are capable, to a certain extent, of functioning in isolation. However, if the United States and Israel maintain the current pattern of operations, including the scale of penetration and decapitation strikes, the Iranian state system and its defence structures could gradually disintegrate, thereby increasing the risk of strategic-level divisions as well as institutional and personal conflicts.

The critical factor for the functioning of the system will be whether the Islamic Revolutionary Guard Corps retains, strengthens, or loses its current dominant position and whether it maintains internal cohesion. Equally important will be the potential emergence or consolidation of alternative centres of power, particularly within the political elite or the regular armed forces. Key uncertainties include the willingness of Iranian society to engage in active political action, including protests and strikes, the risk of anti-government forces shifting to armed operations (as observed locally in Kurdish and Baloch areas) and the future approach of the security forces to any protests. In the coming days, the likelihood of escalating divisions and rising political and social tensions is expected to increase sharply.

Implications for Russia

Russia has strongly condemned the US-Israeli air strikes on Iran. The Russian foreign ministry issued a statement describing them as a "premeditated and unprovoked act of armed aggression" that violated fundamental norms of international law and was carried out "under the cover of the renewed negotiation process". It accused Israel and the United States of embarking "on a perilous course that is swiftly pushing the region toward a humanitarian, economic, and potentially even radiological disaster", warning that this could lead to uncontrolled escalation and undermine the nuclear non-proliferation regime. It also demanded that the conflict be resolved through political means and declared Russia's

readiness to support such efforts. Foreign Minister Sergei Lavrov held telephone consultations with his counterparts in Iran, China, and selected Gulf states. On 1 March, Vladimir Putin sent an emotional message of condolence to Iranian President Masoud Pezeshkian, referring to Khamenei's death in an air strike as an "assassination… committed in cynical violation of all norms of human morality and international law".

Russia's rhetorically forceful response stands in marked contrast to its position towards earlier US military actions, including those in Venezuela. A large-scale attack on an important and close partner of Russia (the two sides signed a new comprehensive strategic partnership treaty in January 2025; see: '*A new Russian-Iranian treaty: closing ranks ahead of Trump's presidency*'), the elimination of its leader, and the prospect of regime change all pose a major challenge for Moscow. These developments have once again exposed Russia's powerlessness, striking a blow to its great-power image. They may neutralise another anti-Western ally of the Kremlin just as it seeks a fundamental revision of the global order. In addition, they have complicated Russian plans to establish a new North-South transport and trade corridor. Short-term gains stemming from higher oil prices and a rise in anti-American sentiment in many countries, particularly across the Global South, are unlikely to offset these setbacks.

The Kremlin thus faces a dilemma: whether to continue viewing Trump primarily as an opportunity to fracture Western alliances and dismantle the sanctions regime imposed on Russia, or to begin perceiving him as a threat arising from his administration's reliance on the use of force, which has produced geopolitical shifts unfavourable to Moscow and could potentially destabilise the Putin regime itself. The absence of any explicit threats in Russian rhetoric suggests that Moscow does not seek confrontation with Washington. However, the Kremlin may resort to other ways of demonstrating its strength, including 'hybrid' operations targeting one of the United States' allies. This would be all the more likely if the US becomes entangled in a prolonged conflict in the Middle East, an outcome that Russia would welcome. Against this backdrop, Russia's de facto alignment with China is likely to consolidate further.

Economic consequences

Since 1 March, maritime traffic through the Strait of Hormuz has effectively come to a halt. This has occurred primarily due to a sharp rise in risk and uncertainty, reflected in a significant increase in insurance premiums or even in the inability to obtain insurance coverage for transit along this route. There have also been reports of disruptions to GPS signals and satellite navigation systems in the vicinity of the strait. The Strait of Hormuz is the main maritime trade route linking the Gulf littoral states, including Iran, with the open ocean. In peacetime, it enables the transport of volumes accounting for around 25% of global seaborne trade in crude oil and petroleum products and 20% of global LNG trade, including the entirety of Qatar's liquefied natural gas exports.

Global financial markets reacted swiftly to the war in Iran. When trading opened on Monday, the price of Brent crude rose by 13% to around $82 per barrel, before falling back to $76 per barrel a few hours later. This increase was significantly smaller than during past oil crises, when oil prices surged several-fold. LNG prices rose more sharply than those of crude oil. On the European TTF exchange, they soared by almost 22% at the opening,

reaching €39 per MWh, with further increases likely. This development stems from a number of factors, including the absence of substantial gas reserves (in contrast to strategic oil stocks), depleted storage levels in the European Union, Qatar's role as the world's third-largest LNG exporter, and Europe's ongoing efforts to minimise gas imports from Russia.

The war in Iran has also prompted rapid adjustments to transport routes, although a more serious disruption in this sector appears unlikely. The world's largest shipping companies, including Maersk, CMA CGM, and Hapag-Lloyd, have been rerouting their vessels to safer corridors amid concerns over security in the Strait of Hormuz and the potential resumption of Houthi attacks on container ships in the Red Sea, particularly given that insurers may refuse compensation for losses incurred as a result of hostilities. Consequently, plans to resume large-scale cargo traffic through the Suez Canal are likely to remain on hold.

Iran's retaliatory strikes against the Arab Gulf states, including an attack on Dubai airport, have led to the temporary closure of several regional airports, notably those in Dubai and Doha, forcing major carriers such as the UAE's Emirates and Qatar Airways, both among the world's ten largest airlines, to suspend operations.