

Iran After Khamenei

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On February 28, 2026, US and Israeli warplanes struck Iran's nuclear and missile infrastructure and killed Supreme Leader Ali Khamenei — the man whose 36-year doctrine of permanent resistance to American power had defined the conflict. Three months later, Iran still holds 440.9 kg of 60%-enriched uranium, roughly half its missile launchers, and a theocracy that refuses to collapse. The war ended a regime's reach, not its existence, and the question now is whether anything that follows can be called a settlement.

Iran in 2026 is the rare case where overwhelming military victory has produced no diplomatic clarity. The "axis of resistance" is broken. Hezbollah is degraded, Assad is gone, the Houthis are isolated, and the IRGC's command structure has been hollowed by targeted strikes. Yet Tehran's negotiating position has, in some ways, hardened. To understand why, you have to start with the man who built the doctrine, the structure that outlived him, and the failed diplomatic record that frames every current proposal.

The Khamenei Doctrine Outlives Khamenei

Khamenei's posture toward Washington was not a policy preference. It was an identity formed in 1962 in Qom, hardened in the Shah's prisons, ratified during the Iran-Iraq War, and institutionalized across his 36 years as Supreme Leader. Each phase added a layer: revolutionary anti-imperialism, the conviction that compromise invites betrayal, the lesson that the West will arm your enemies, and finally the belief that nuclear latency is the only currency the United States respects. The result was a [doctrine of permanent resistance](#) that was not negotiable because it

was not, strictly speaking, strategic. It was constitutive.

His death has not loosened that doctrine. It has handed it to the IRGC. The same institution that derives its economic empire from sanctions evasion and its political legitimacy from proxy networks now sets the ceiling on any concession Tehran can make. The pragmatists who might have used Khamenei's absence to pivot — figures like Ali Larijani — were assassinated during the 2026 conflict. The reformist bench, already thin after a decade of purges, is empty.

Why the Pragmatist Path Was Foreclosed Long Ago

It is tempting, watching the wreckage of 2026, to imagine a Khatami or a Rouhani waiting in the wings. There is no such wing. Iran's reformist tradition was not defeated in a single moment; it was dismantled across three presidencies. Khatami's "Dialogue Among Civilizations" was strangled by Khamenei and the Guardian Council in the late 1990s, with his chief strategist Saeed Hajjarian shot in the face on a Tehran doorstep in March 2000. Rouhani delivered the JCPOA in 2015 and watched Trump tear it up in 2018, after which Iranian state media subjected him and Foreign Minister Zarif to a sustained campaign blaming them for the country's vulnerability. Rafsanjani died in January 2017 under contested circumstances, and the Guardian Council has spent the years since systematically barring his political descendants from the ballot. The [pattern was deliberate](#): every failure of engagement was used to discredit the engagers, not the engagement.

This matters because Washington keeps negotiating as if there is a Tehran faction waiting to say yes. There isn't. Hardliners did not just win the argument — they eliminated the people who could lose it for them.

The Three Failures That Predict the Fourth

The diplomatic record reads like a single recurring failure mode. The 1981 Algiers Accords released 52 hostages but established no diplomatic relations and no recognition of legitimacy — Reagan promptly funded Iranian exile groups Tehran considered terrorists. The 2015 JCPOA built sunset provisions into a deal that opponents called "the worst ever," and Trump's May 2018 withdrawal proved that any US commitment to Iran could survive only as long as the next election cycle. The 2021-2022 Vienna talks collapsed when Iran demanded the IRGC come off the US terror list, Tehran wanted unilateral-withdrawal guarantees Washington couldn't credibly offer, and Russia tried to exempt its own Iran trade from Ukraine sanctions.

The [structural diagnosis](#) is consistent across all three: no mutual recognition, asymmetric domestic commitment mechanisms that let either side walk away, and a scope mismatch in which Iran wanted narrow nuclear deals while Washington demanded comprehensive ones covering missiles, proxies, and human rights. The 2026 round inherits every one of these defects and adds a new one: Trump's current "zero enrichment" demand exceeds even the 2015 framework, while Iran's stockpile and the IRGC's post-Khamenei dominance push Tehran's minimum acceptable terms in the opposite direction. As of May 10, 2026, Iran holds enough 60%-enriched uranium for roughly ten weapons if pushed to weapons-grade. Each side's floor is above the other's ceiling. That is the definition of no zone of agreement.

Why the Regime Probably Survives

The question of what severe military degradation produces — collapse, consolidation, or insurgency — has a clearer historical answer than most observers want to admit. Iran has lost 60-90% of its ballistic missile launchers and most of its missile production capacity. It has also carried out 190 executions in 2026 alone. The coercive apparatus is intact even as the conventional military is not. The [historical precedents that produce collapse](#) — Imperial Germany 1918, the Soviet Union 1991, Ming China 1644 — required simultaneous military defeat, elite defection cascades, and popular mobilization. Iran has only the first. The IRGC shows no defection patterns comparable to the 13 of 15 Soviet republics that turned in 1991. The 5 million Iranians who protested in over 100 cities in late December 2025 are unarmed and confronting one of the region's most repressive security states.

The likeliest pathway is consolidation: a narrower security elite, harsher domestic repression, surviving asymmetric strike capacity through tunnel-based mobile launchers and one-way drones, and eventually a deal with Washington that preserves the system rather than transforming it. Regimes of this type, the autocratic-research literature suggests, almost never democratize. They transition to other autocracies, or they don't transition at all.

The Regional Order Iran Leaves Behind

What's emerging around the Iranian vacuum is more interesting than the vacuum itself. Israel is now the region's preeminent military power and, simultaneously, the state most Gulf governments have come to regard as the principal source of regional instability — a perception that hardened after Israel's strike on Hamas leaders in Qatar. Saudi Arabia maintained studied neutrality through the Twelve-Day

War of June 2025, skipped Trump's Gaza peace summit, and is now pursuing pragmatic rapprochement with a weakened Tehran rather than normalization with an unpredictable Jerusalem.

Turkey has been the war's clearest geopolitical winner. Assad's fall in December 2024 gave Ankara a friendly Damascus, control over reconstruction in northern Syria, and a seat on Trump's Board of Peace. Erdoğan's February 2026 visits to Cairo and Riyadh proposed a Middle East Corridor connecting Asia to Europe through Turkish infrastructure. A new quadrilateral — Egypt, Pakistan, Saudi Arabia, and Turkey — has emerged as the primary mediation channel between Washington and Tehran. Combined, these four states represent 500 million people, Pakistan's nuclear arsenal, Saudi oil, Egyptian control of Suez, and Turkish NATO membership. It is not a formal bloc. It is a [structural realignment](#) designed to curb both Iranian reconstitution and Israeli hegemony — a regional order that wants neither of its 2024-era poles back.

The Settlement That Cannot Be Negotiated

A genuine US-Iran settlement would require Washington to accept some level of Iranian enrichment, drop demands on missiles and regional proxies, and provide credible sanctions-relief guarantees that survive the next election. It would require Tehran to surrender or down-blend its 60%-enriched stockpile, accept intrusive IAEA monitoring including daily access to Natanz and Fordow, and constrain — though not eliminate — its missile program and proxy support. Foreign Minister Araghchi told CBS on March 15, 2026 that Iran was prepared to dilute its enriched material. The head of Iran's Atomic Energy Organization said the opposite within weeks.

The [domestic blockers on each side](#) are mirror images. In Washington: congressional Republicans, pro-Israel Democrats, AIPAC, a Rasmussen poll from May 2025 showing 57% of Americans supporting an attack on Iran, and a defense industry that benefits from sustained confrontation. In Tehran: the IRGC, the Quds Force, the clerical establishment, and a conviction — reinforced by Khamenei's killing — that nuclear latency is now the only guarantor of regime survival. Jeffrey Lewis put it cleanly: Iran is likely to reach the conclusion North Korea reached, that going nuclear is safer than not.

What Comes Next Is Not a Deal

The most plausible 2026-2027 trajectory is not settlement and not collapse. It is a

slower, uglier equilibrium: a narrower IRGC-dominated elite consolidating control through executions and surveillance, a residual missile and drone arsenal capable of asymmetric retaliation, intermittent sabotage and cyber exchanges, and the quadrilateral mediating talks that produce technical agreements without resolving the underlying mutual non-recognition that has defined US-Iran relations since 1979. Tehran will likely cross the weapons-grade threshold quietly, as North Korea did, while denying it publicly. Washington will likely accept that outcome, as it accepted North Korea's, because the cost of preventing it is higher than the cost of containing it.

The lesson of 1981, 2015, and 2022 is that the US-Iran conflict has never been resolved because it was never primarily about nuclear weapons, sanctions, or proxies. It is about whether either state recognizes the legitimacy of the other. After Khamenei's assassination and the destruction of Iran's conventional deterrent, that question is harder to answer affirmatively from Tehran's side, not easier. The next deal, if one comes, will look less like reconciliation and more like the armistice on the Korean peninsula: a managed conflict frozen in place, waiting for a generation that does not yet exist on either side to ask different questions.

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