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IRAN-US WAR: **WHAT VICTORY MEANS IN TEHRAN**

How Iranian perceptions of victory
and defeat are shaping Tehran's choices
in the conflict with the United States

by Mohammad Shajari

When Iran's leadership says it has won the war, what does "victory" actually mean? To answer that question, it is first necessary to consider the position in which the Iranian state entered the conflict. The war did not begin in a political vacuum, as Iran was already facing significant domestic pressures, including economic hardship, public dissatisfaction and concerns over social cohesion. The outbreak of conflict therefore introduced a new dimension to an already difficult domestic environment, allowing the leadership to place greater emphasis on national security, resistance and unity. This context matters because Tehran's definition of victory appears to extend well beyond events on the battlefield.

The answer emerging from Iranian official and state aligned reporting is different from a conventional definition of military victory. Senior Iranian figures rarely describe success as defeating the United States (US) militarily, instead, they focus on preventing their adversaries from achieving their objectives, preserving Iran's ability to respond and avoiding surrender. Political survival, strategic independence and the ability to continue making decisions without external control all feature prominently in this account. These ideas provide an important window into how Tehran is interpreting the conflict and what it may consider an acceptable outcome.

The purpose of examining this language is not to decide whether Iran's claims of success are correct. Iranian officials are describing events through their own political and strategic perspective, and their statements should be understood in that context. For Washington, however, understanding that perspective matters because it can help explain how Tehran interprets pressure and what may influence its next decisions. Seen from Tehran, there is a clear difference between being weakened and being defeated.

As long as the leadership believes Iran retains control of its own decisions, the costs of the conflict do not necessarily amount to strategic defeat. Military damage, economic pressure and political difficulty can all be acknowledged while the leadership continues to argue that Iran has successfully resisted. This helps explain why Tehran may continue to see resistance as rational even when the costs are substantial. It also means that understanding Iran's behaviour requires understanding the measure by which its leaders believe success should be judged.

Key Message: For Tehran, victory is not necessarily defeating its adversaries, but preserving political survival, strategic independence and the ability to make decisions without external control.





Mohammad Bagher Ghalibaf, Speaker of the Parliament of Iran and Head of Iran's Negotiating Team with the United States. Source: ISNA

RESEARCH METHODOLOGY

This analysis draws on 200 Persian language articles and reports collected between 28 February and 20 August 2026, primarily from Iranian official and state-aligned sources. The research focused on statements by senior political, military and diplomatic figures, as well as recurring themes including victory, defeat, resistance, surrender, deterrence, economic resilience and diplomacy. These sources were used to examine how Tehran explains the conflict and presents its strategic choices, rather than as a measure of Iranian public opinion. Because much of the material comes from state-aligned reporting, it is treated primarily as evidence of the narratives, priorities and arguments being advanced by the Iranian leadership.

The analysis is also informed by the author's background and familiarity with Iranian language, culture and domestic politics. Born in Iran and a native Persian speaker, the author is able to engage directly with Persian language material and assess how political concepts are framed in their original linguistic and cultural context. His academic background in criminology and global crime and justice, including research focused on Iran, is complemented by professional experience in strategic communications and geostrategic consultancy. This combination of linguistic, cultural, academic and professional experience supports the interpretation of concepts such as dignity, resistance and surrender, which can carry political and cultural meaning beyond their literal English translation.

A DIFFERENT DEFINITION OF VICTORY

Mohammad-Baqer Ghalibaf, speaker of Iran's parliament and head of Iran's negotiating team with the US, has offered the clearest explanation of Tehran's definition of victory. In his view, victory does not require Iran to destroy the military power of its adversaries. Instead, success should be judged by whether the US achieved the objectives for which it entered the war. Under this interpretation, Iran can still claim victory if Washington fails to achieve its main objectives and Tehran retains control over its strategic choices.

Other Iranian officials use the country's continued ability to respond as evidence supporting this argument. Hossein Taeb, commander of the Basij paramilitary force, has argued that heavy military pressure failed to break Iranian resistance, while Army commander Amir Hatami has said that Iran's defence capability changed its opponents' calculations and encouraged movement towards a political solution. Iranian sources also point to continued missile and drone attacks on US positions as evidence that Tehran has not been neutralised. From this perspective, if Iran can still respond and influence events, military damage alone does not amount to strategic defeat.

The same logic extends to the battle over how the conflict is presented. Iranian reporting treats some of President Trump's public statements, including those made through social media, as part of a wider contest over who appears to hold the initiative. Any gap between claims that Iran has been decisively weakened or its military capability destroyed, and Tehran's continued ability to act, can therefore be used to strengthen its narrative of resistance.

WHY SURRENDER MATTERS

The Iranian understanding of defeat follows the same logic. Across the research, ideas of dignity, independence, resistance and surrender appear repeatedly in the way officials describe the choices facing the country. These are not presented as political slogans, but as part of the leadership's broader understanding of what would constitute success or failure. In this view, defeat is not defined only by the damage Iran suffers, but by whether external pressure succeeds in determining Tehran's decisions.

Ghalibaf has argued that Iran must preserve its dignity and honour despite the costs involved. State aligned commentary in the research makes a similar case, presenting surrender as potentially more damaging than resistance if it weakens independence or the country's ability to defend its interests. Foreign Ministry spokesman Esmail Baghaei has expressed the same point in more diplomatic language, arguing that Iran does not adjust its policies according to outside pressure or imposed deadlines. Together, these statements help explain why the distinction between compromise and surrender is so important in Tehran.

Key Message: For Tehran, defeat is not simply suffering damage or making concessions, but allowing external pressure to dictate Iran's decisions and undermine its independence.



Iranian people in Mazandaran supporting the Islamic Republic during the war. Source: ISNA

Iran's leadership does not appear to regard reaching an agreement as evidence of defeat in itself. President Masoud Pezeshkian has defended the June memorandum of understanding with the US, presenting it as an agreement reached from a position of "power and dignity" rather than surrender. In the Iranian account, the key issue is therefore not simply whether Tehran makes concessions, but whether those concessions can be presented as decisions Iran chose to make rather than steps it was forced to take. An agreement reached through negotiation can fit within Tehran's definition of success in a way that an outcome presented as capitulation cannot.

The way any future agreement is presented will matter greatly. Iranian leaders will need to show that it was reached through negotiation, not because Iran was forced to surrender. Greater pressure may make Tehran more willing to negotiate, but it can also make compromises harder to justify at home. This tension will shape how much room the leadership believes it has to compromise.

MILITARY POWER AS POLITICAL LEVERAGE

The research also shows that Tehran does not judge military capability only by its ability to win battles. Its value lies partly in whether it can influence the calculations of the other side. One analysis in the material describes Iran's approach as "active deterrence", in which the country does not require complete military superiority but does need enough capability to make attacks costly and uncertain. The ability to survive an initial strike and continue responding is central to that idea.

This helps explain the emphasis on missiles and drones in Iranian discussions of the conflict. Their value is not measured only by the damage they cause, but also by the pressure they place on defensive systems and the resources required to intercept them. Iranian analysis presents continued readiness, the use of defensive resources and the ability to sustain operations as part of the wider cost imposed on an opponent. Deterrence, in this view, depends as much on endurance as on the initial strike itself.

Key Message: For Tehran, military power matters less as a means of achieving battlefield superiority than as a way to preserve retaliatory capability, impose costs and strengthen its position in negotiations.

That thinking connects directly to Tehran's wider definition of victory. As long as Iran retains a credible ability to respond, officials can argue that the country has not been neutralised and still possesses leverage. The research repeatedly links this capability with diplomacy rather than treating the two as separate tracks. Foreign Minister Abbas Araghchi has described "diplomacy and the field" as moving together, with diplomatic activity drawing strength from Iran's defence capability.

Military power is therefore understood partly as a means of shaping negotiating terms. Iran does not need to achieve conventional military parity for its capabilities to matter politically. What matters is whether Tehran believes those capabilities give it enough room to resist pressure and bargain from a position it considers acceptable. This is one reason why the survival of retaliatory capability features so prominently in the Iranian discussion.



Iran's Abu Mahdi missile, a long-range Iranian naval cruise missile. Source: ISNA

HORMUZ AS STRATEGIC LEVERAGE



The Strait of Hormuz. Source: ISNA

The Strait of Hormuz occupies a particularly important place in Tehran's view of the conflict. Mohammad Javad Iravani, a member of Iran's Expediency Discernment Council, has described the Strait as a "lever of power" for Iran, while Ghalibaf has linked its reopening to the implementation of the Islamabad Memorandum of Understanding. In Iranian discourse, Hormuz is therefore not treated simply as a security issue, but as a source of political and economic leverage that Tehran believes can strengthen its position in negotiations.

That leverage, however, depends on the Strait continuing to matter to international shipping. Iranian reporting itself recognises that the value of Hormuz comes from the movement of commercial vessels, oil tankers and other traffic through the waterway. The research also discusses plans for Iran and Oman to play a greater role in managing shipping, including navigation services and possible revenues linked to those services. In other words, Iran benefits strategically from being able to influence traffic through Hormuz, not from making the Strait permanently unusable.

This creates an important limit on how far Tehran can push the issue. If pressure becomes so great that shipping companies and other states begin investing seriously in alternative routes or reducing their dependence on Hormuz, Iran could gradually weaken the very leverage it is trying to preserve. The Iranian discussion of stable navigation, managed access and continued commercial traffic suggests that the leadership is aware of this balance. The Strait is most useful when Tehran can influence access to it, rather than when traffic disappears altogether.

Hormuz is therefore best understood as a bargaining tool whose value depends on restraint and pressure. Tehran can tighten or relax access, link reopening to wider political conditions and use uncertainty around the Strait to strengthen its negotiating position. But if it pushes that pressure too far or for too long, the incentive for others to find alternatives grows, reducing Iran's influence over time. The strategic value of Hormuz lies not simply in Iran's ability to disrupt it, but in preserving it as a lever that others still need.

Key Message: For Tehran, the Strait of Hormuz is most valuable not when it is closed, but when Iran can credibly control access to it and use that influence as leverage in negotiations.

THE CONFLICT HAS MOVED INTO THE ECONOMY

Another theme running through the research is the way Iranian officials increasingly treat economic pressure as part of the wider conflict. Taeb argues that, once military pressure failed to produce the intended result, the focus shifted towards economic, social and domestic pressure. Ghalibaf makes a similar point, describing the private sector as the “commanders of the economic war” and stressing the role of businesses in helping the country cope with sanctions. In this framing, economic resilience is not seen as a separate domestic issue, but as another part of Iran’s wider ability to resist pressure.

First Vice-President Mohammad Reza Aref goes further, arguing that economic pressure is being used with the aim of creating social collapse after military pressure failed to achieve its purpose. In response, he identifies preserving and increasing Iran’s resilience as an important government priority. This reveals how closely Tehran now links living standards, public confidence and national security. The concern is that sustained economic pressure could gradually weaken the social cohesion required to maintain the wider strategy of resistance.

Key Message: **For Tehran, economic resilience has become part of the conflict itself, because sustaining social cohesion and public confidence may prove as important to its claim of victory as surviving military pressure.**



In August 2026, Iranian households paid 84.4% more for the same goods and services than they did in August 2025. Source: IRANWIRE

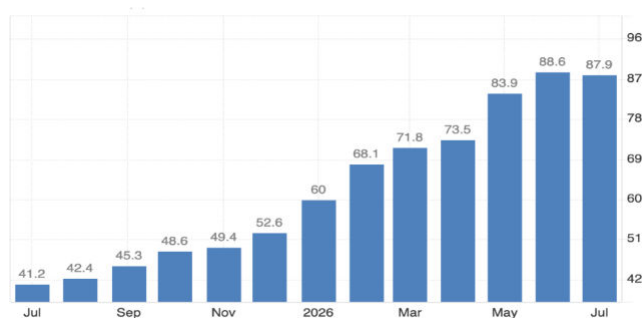
Iranian figures also acknowledge that economic grievances are real. Aref has described current price rises as a genuine problem, while other state aligned voices argue that supporting the political system should not mean ignoring economic hardship, inequality or poor performance. There is therefore a tension in Tehran’s own account, economic difficulties are both genuine domestic problems and vulnerabilities that can weaken Iran during the wider confrontation. That tension may become more important the longer the conflict continues.

For Tehran, this means that military survival on its own may not be enough to sustain the claim of victory. If inflation, falling living standards and wider economic pressure continue to weaken public confidence, the leadership may find it harder to argue that endurance itself represents success. Iran’s ability to maintain its current definition of victory will therefore depend increasingly on whether it can preserve social cohesion and economic stability at home, not only on what happens on the battlefield.

PEOPLE MUST ALSO BELIEVE IN THE VICTORY

The research also shows that Tehran is concerned not only with claiming victory, but with whether the public believes that claim. Although Ghalibaf describes Iran as having achieved military and political victory, he also acknowledges that many people may not feel that sense of victory themselves. In his view, the fact that people are still asking what was actually achieved shows that the state has not communicated its case convincingly enough. This points to an important gap between the leadership declaring victory and the public actually accepting that version of events.

Iranian state aligned sources frequently refer to a war of narratives, meaning a struggle over how the public interprets the conflict. One source argues directly that Iran's adversaries are seeking to create a sense of defeat within society by using domestic problems to reinforce a wider picture of national failure. The leadership's preferred account is clear, Iran faced stronger opponents, survived substantial pressure, retained the ability to respond and prevented what Tehran describes as the main objectives of its adversaries from being achieved. From that perspective, the country has grounds to claim success.



Iran's inflation rose sharply from 41.2% in July 2025 to 87.9% in July 2026.
Source: Statistical Center of Iran

Key Message: For Tehran, victory must not only be claimed by the leadership but believed by the public, making the battle over perceptions nearly as important as the conflict itself.

The difficulty arises if the public uses another measure. Iranian leaders may focus on sovereignty, deterrence and the survival of strategic capabilities, while ordinary citizens experience the conflict through prices, employment, security and the quality of daily life. The research cannot tell us how large this gap is because the material comes from state aligned voices. What it does show is that the leadership itself is worried about whether its interpretation is being accepted.

That concern matters for future decision-making. Economic pressure and public dissatisfaction may increase the incentive to reach an agreement, but they may also make the leadership more sensitive to how that agreement is presented. A compromise that appears imposed could deepen the very perception of defeat that officials say they are trying to avoid. Tehran may therefore seek an outcome that addresses economic pressure while still allowing it to claim that the country retained control over its choices.

DIPLOMACY CAN STILL BE PART OF VICTORY



Abbas Araghchi, Minister of Foreign Affairs of Iran. Source: Mehr News

Iran's emphasis on resistance does not mean Tehran sees diplomacy as a sign of weakness. The research points in the opposite direction, with Araghchi presenting diplomacy and military power as parts of the same strategy. He has said that "diplomacy and the field" move in coordination and that diplomatic efforts rely on Iran's defence capability to protect national interests. Ghalibaf has used similar language, describing diplomacy as a means of consolidating what he regards as Iran's military and political achievements.

Pezeshkian has also defended the recent agreement in similar terms, saying that it was pursued with dignity and power and that Iran had not given way to its adversaries. These statements show that Tehran can negotiate without necessarily concluding that it has lost. Military endurance can be presented as creating bargaining power, while diplomacy converts that position into a political outcome. An agreement may therefore fit comfortably within the Iranian definition of victory if the leadership can argue that resistance helped produce it.

This means the same agreement could be presented very differently in Tehran and Washington. Tehran could argue that resistance protected Iran's independence and helped produce an acceptable deal, while Washington could present the outcome as evidence that pressure brought Iran to the negotiating table. The two sides would not need to agree on who won for an agreement to hold. From Tehran's perspective, what matters most is being able to present the outcome at home as a negotiated decision rather than a surrender imposed from outside.

Key Message: For Tehran, diplomacy can reinforce rather than contradict resistance, allowing an agreement to be presented as the political result of endurance rather than evidence of surrender.

SCENARIO ONE (MOST LIKELY):

NEGOTIATED DE-ESCALATION FROM A POSITION OF RESISTANCE

The most likely future pathway is a gradual move towards negotiated de-escalation in which Tehran continues to present resistance and diplomacy as parts of the same strategy. Iranian officials do not appear to view negotiations as evidence of defeat, provided an agreement can be reached in a way that preserves what they describe as dignity and independence. Araghchi's language about diplomacy and the battlefield working together supports this reading, as does Pezeshkian's defence of agreement from a position of "dignity" and "power". Negotiations would therefore be presented not as the abandonment of resistance but as the point at which resistance produced a political result.

Under this scenario, Tehran would seek to show that it entered talks because it retained leverage rather than because it had surrendered. Economic relief would be important because the research repeatedly shows that Iranian officials now regard economic resilience as part of the wider conflict. An agreement that reduces economic pressure while preserving what Tehran regards as key strategic interests could therefore be presented as a practical outcome of resistance. Any compromise would need to be presented as part of a two-way agreement, rather than as Iran simply giving in to outside demands.

This pathway sits closely with the leadership's current definition of victory. Tehran would not need to claim that it had defeated the US militarily, only that it had resisted pressure, maintained its independence and reached an acceptable agreement. The main difficulty would arise if the terms were widely understood inside Iran as humiliation or capitulation. The repeated emphasis on dignity and surrender suggests that the way an agreement is reached and presented may matter almost as much as some of its individual provisions.

SCENARIO TWO:

PROLONGED MANAGED CONFRONTATION

A second pathway would involve a longer period of confrontation in which Tehran concludes that continued resistance remains preferable to accepting terms it regards as unfavourable. Iranian official discourse repeatedly presents endurance as evidence that military pressure has failed to achieve its intended result. Taeb, Ghalibaf and other figures argue that Iran's ability to continue resisting shows that its adversaries have been unable to force the country to submit. If that view remains dominant, Tehran may see little reason to move quickly towards an agreement it considers one-sided.

Under this scenario, Iran could continue relying on the military and economic tools that feature prominently in its own discourse, including missiles, drones and pressure linked to the Strait of Hormuz. Diplomacy would remain available, but Tehran would be more likely to engage when it believed conditions had become more favourable. Continued resistance would therefore be presented not as a rejection of diplomacy, but as a way of protecting Iran's bargaining position until an acceptable political outcome became possible. The basic calculation would be that Iran still possesses enough leverage to avoid accepting what it considers surrender.

The weakness in this strategy lies increasingly inside Iran. Aref's comments on economic resilience, alongside Ghalibaf's discussion of economic pressures, show that the leadership is aware of the domestic costs of endurance. A prolonged confrontation can remain sustainable only while the state believes that society and the economy can continue to absorb those costs. If economic pressure begins to damage social cohesion, Tehran may find that the greatest challenge to resistance comes from within rather than from the loss of military capability alone.

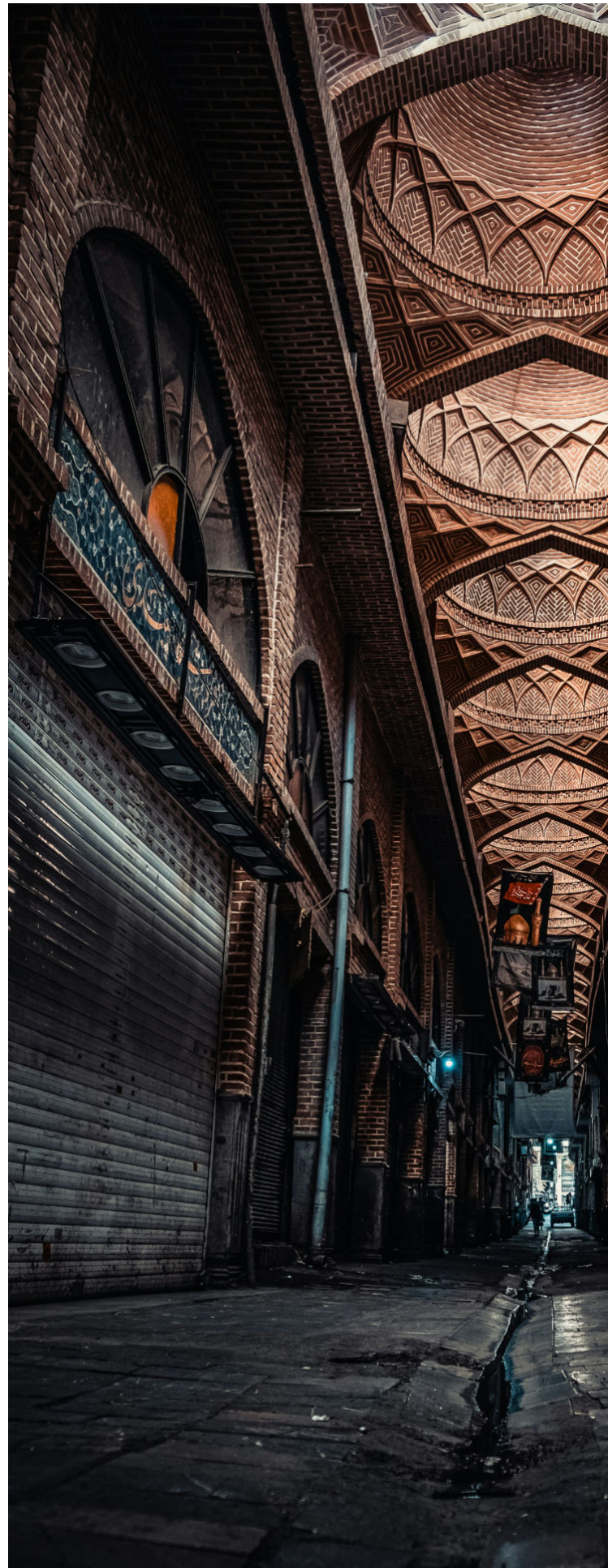
SCENARIO THREE:

ESCALATION TO AVOID PERCEIVED DEFEAT

The least likely but potentially most dangerous pathway would emerge if Tehran concluded that continued restraint was weakening its position or that further external pressure was intended to force concessions it regarded as surrender. Iranian officials repeatedly stress the need to preserve the ability to respond, while the idea of active deterrence in the research rests on maintaining enough capability to impose costs even after Iran has been attacked. If Tehran believes that this ability is fading, it may conclude that stronger action is needed to demonstrate that Iran still has options. Escalation would therefore be aimed at restoring leverage rather than achieving conventional military victory.

This could involve greater use of missiles and drones or increased pressure around the Strait of Hormuz. Within the logic found in Iranian official discourse, the purpose would be to show that further pressure will not produce submission and that Tehran has not lost control over its strategic choices. Such action could also be intended to strengthen Iran's position before renewed negotiations.

Iran's definition of defeat could make it harder to step back from the conflict. If restraint is seen as weakness and compromise as surrender, Tehran may feel it has to keep applying pressure even if it would prefer a settlement. In that case, escalation could be driven less by a belief that Iran can win militarily and more by a desire to avoid looking defeated.



STRATEGIC TAKEAWAY

The Iranian material examined for this research suggests that Tehran does not define victory mainly in military terms. Senior officials instead describe success as preventing an opponent from achieving its objectives, maintaining the ability to respond, preserving Iran's independence and avoiding surrender. Ghalibaf's explanation captures this clearly, the important question in his view is not whether Iran has destroyed the other side's military, but whether that side achieved the goals it entered the war to pursue. This provides a useful guide to how Tehran appears to judge success and failure.

This helps explain why the leadership can continue to describe its position as successful despite significant military and economic pressure. As long as Iran believes it can still make its own decisions, respond to pressure and avoid an outcome imposed from outside, Tehran can argue that it has not been defeated. The same thinking also leaves room for diplomacy, because reaching an agreement does not necessarily mean accepting defeat. If Tehran can present an agreement as a negotiated outcome rather than surrender, it can still fit within its definition of victory.

Tehran's next steps are therefore likely to depend on three things: whether Iran can continue to impose costs on its adversaries, whether it can continue to absorb the pressure placed on it, and whether the leadership can maintain the argument at home that resistance remains preferable to surrender. For Washington, the value of understanding this perspective is not in accepting Tehran's account of events, but in recognising the way Iranian leaders appear to assess their own position. This can help explain why pressure that appears severe from the outside may not immediately lead Tehran to conclude that its strategy has failed.

The key question is not whether Iran believes it can defeat the US militarily. It is whether Tehran still believes it can resist pressure, protect its core interests and avoid being forced into an outcome it would see as surrender. As long as the leadership believes it can do that, it is likely to continue viewing its strategy as successful. If that confidence begins to weaken, Tehran may become more willing to change course.



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