

For Iran's Rulers, Refusing U.S. Demands Is a Risk Worth Taking

The government in Tehran sees capitulating to Washington's demands on uranium enrichment and ballistic missiles as riskier to its survival than going to war, analysts say.



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Facing high-stakes brinkmanship as American warships and fighter jets mass off its shores, Iran has refused to concede to President Trump's demands on its nuclear program and weapons — a stance that has bewildered U.S. officials.

The authoritarian clerics who rule Iran see those concessions — which, in their view, could compromise their core ideology and sovereignty — as a greater threat to their survival than the risk of war.

A dangerous mismatch in perceptions between Iran and the United States is why efforts to negotiate a deal over Iran's nuclear and military capabilities look increasingly fragile, experts say, and a new regional conflict seems almost inevitable.



“Avoiding war is indeed a high priority, but not at any cost,” said **Sasan** Karimi, a political scientist at the University of Tehran who served as the deputy vice president for strategy in Iran’s previous government. “At times, a political state — especially an ideological one — may weigh its place in history as heavily as, or even more heavily than, its immediate survival.”

U.S. and Iranian negotiators are struggling to break an impasse over their respective red lines.

The Trump administration says it wants Iran to agree to zero nuclear enrichment to ensure it cannot build a nuclear weapon. U.S. officials have also sometimes insisted on limiting the range of Iran’s ballistic missiles and ending the country’s support for allied militias across the region.

For Iran, which says its nuclear program is for peaceful purposes only, nuclear enrichment is a right that the supreme leader, Ayatollah Ali Khamenei, upholds and that his officials cannot abandon. And Iran sees possessing missiles that can reach as far as Israel as critical for self-defense.

Iran's supreme leader, Ayatollah Ali Khamenei, in Tehran in 2024, the year he said, "Nuclear energy is not the problem, nor are human rights; America's problem is with the very existence of the Islamic Republic." Arash Khamooshi for The New York Times

U.S. and Iranian officials are set to meet in Geneva this Thursday for talks seen as a last-ditch effort to find a compromise before Mr. Trump orders a strike. According to people briefed on internal administration deliberations, the two sides will consider a proposal that offers an off-ramp to war: Allowing Iran a limited nuclear enrichment program for civilian purposes.

Mr. Trump's administration views Tehran as so weak that it should accept U.S. demands, regional officials have said.

Last June, Iran suffered heavy blows during a 12-day war launched by Israel and briefly joined by U.S. warplanes. That conflict coupled with biting international sanctions have plunged Iran's economy deeper into crisis.

In January, authorities used deadly force to crush nationwide protests demanding Ayatollah Khamenei's ouster. Some smaller protests re-emerged over the weekend, demonstrating how hostile many Iranians are toward their leaders.

On top of that, the government in Tehran is facing a major buildup of U.S. firepower in the Persian Gulf, including two aircraft carrier strike groups, and a massing of reconnaissance and refueling jets across the Middle East.

Mr. Trump's lead negotiator with Iran, Steve Witkoff, described the president as "curious as to why they haven't" capitulated, in an interview with Fox News over the weekend.

The vice president, JD Vance, told Fox last week that despite the threat of war, Iranians “are not yet willing to actually acknowledge and work through” the president’s demands.

Yet it is the very perception of Iran’s weakness that experts say makes Tehran determined to resist.

“For Iran, submitting to U.S. terms is more dangerous than suffering another U.S. strike,” said Ali Vaez, the Iran director of the International Crisis Group. “They don’t believe that once they capitulate, the U.S. will alleviate the pressure. They believe that would only encourage the U.S. to go for the jugular.”

Ayatollah Khamenei has repeatedly stressed his view that Washington’s eventual aim is to topple Iran’s system of governance.

“Nuclear energy is not the problem, nor are human rights; America’s problem is with the very existence of the Islamic Republic,” he said in a speech in 2024.

An Israeli strike last summer damaged the headquarters of Iran's state TV broadcaster in Tehran. Analysts say Iran's leaders learned lessons from last year's conflict that could help them keep control.
Nanna Heitmann for The New York Times

Danny Citronowicz, an expert at the Atlantic Council who previously headed the Iran branch of Israel's Defense Intelligence, said that beyond strategic calculations like the ballistic missiles, Ayatollah Khamenei insists on uranium enrichment as "a pillar of the regime itself." If Iran's leaders concede on those points, "they will actually undermine the existence of the regime itself," he said.

"I think they don't have any other choice than to take the bet on the military side," he added.

Two of the main questions ahead of any potential confrontation are whether a U.S. attack would go as far as trying to topple the political system in Iran, and whether Tehran would be able to retaliate enough to make the conflict painful for Mr. Trump, too.

Tehran would probably seek to absorb limited strikes and cap its retaliation to attacks on U.S. bases in the Middle East, as it did last June, according to Farzin Nadimi, a defense analyst focused on Iran at The Washington Institute for Near East Policy, a think tank.

If Mr. Trump chooses to go further, U.S. forces, probably with the help of Israel, would have to race in the first few days to take out as much of Iran's military capabilities as possible to hamper an attempt at a far fiercer and broader retaliation, Mr. Nadimi said.

That would require “an extensive effort both by the U.S. and Israelis — not only the air power, but also ground elements — to make sure that their missile threat is neutralized,” he said.

Iran would in turn try to mimic the success of the Houthi militia, its ally in Yemen, regional experts say.

In 2025, the Houthis derailed a U.S. military campaign that aimed to stop the group’s attacks on international shipping in the Red Sea. The group persistently attacked U.S. drones and international vessels, including an American aircraft carrier.

The 31-day confrontation cost Washington well over \$1 billion, and Mr. Trump ultimately struck a deal instead of risking a drawn-out military entanglement.

A member of the Houthi militia, which is backed by Iran, in Sana, Yemen, in 2024. Khaled Abdullah/Reuters

Iran could try to create a protracted and deadly confrontation that could hurt Mr. Trump in a midterm election year, analysts said.

One unknown is whether Iran could launch strikes on oil tankers passing through strategic shipping lanes like the Strait of Hormuz, or have its Houthi allies strike vessels in the Red Sea, said Mohammad Ali Shabani, an Iran analyst and editor of the regional news website Amwaj.media.

If a new conflict were to drive gasoline prices up one or two dollars per gallon, that could feel very risky for Mr. Trump before midterm elections this fall, he said.

U.S. and Israeli forces could deal a quick and devastating blow, as they did last June, when a string of top Iranian military officials were killed within hours and Iran's nuclear and military facilities were battered.

But Tehran learned lessons from that war, Iranian and regional officials say, and has prepared several layers of leadership to replace anyone killed. This aims to ensure that the system survives the conflict even if Ayatollah Khamenei and other leaders did not.

Regional officials speaking to Tehran and Washington say that if Mr. Trump chooses to strike, his aim will probably be to jolt the Iranian leadership severely enough to force it back to the negotiating table on his terms.

But several experts said that Iran refused to capitulate to U.S. terms after the last war and that if it survived another, it would probably refuse again.

“To think that a war every time either makes Iran more flexible or facilitates diplomacy is nothing but a delusion,” Mr. Vaez said.

Sanam Mahoozi and Farnaz Fassihi contributed reporting.

A correction was made on Feb. 23, 2026: An earlier version of this article misstated the year of Houthi actions to derail a U.S. military campaign in the Red Sea. The actions took place in 2025, not 2023.

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