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A window into Tehran

Iran's power transition has created room for diplomacy. But Europe's chance to shape the new order may be passing faster than expected

Six months have passed since the joint US-Israeli airstrike that killed Ali Khamenei. Less than two weeks later, his son Mojtaba Khamenei was elected as the new Supreme Leader of the Islamic Republic. Yet the crucial question today is not the succession itself, but rather: to what extent does the new leader already wield the power his father built up over decades? So far, the answer is clear: not yet fully. That is precisely where a diplomatic opportunity lies — including for Europe.

Ali Khamenei had decades to build an extensive network of political, military and security loyalties. Mojtaba Khamenei, by contrast, came to power under very different circumstances: during the war with the United States and Israel, amid massive economic pressure and at a time when the Islamic Republic's power structure is being reshaped. This transitional phase has opened a diplomatic window that did not exist before — and Europe should seize it before the new power structure in Tehran becomes entrenched.

Room for manoeuvre

In the first months after the leadership change, decision-making was more widely distributed than before among several centres of power: the government of Masoud Pezeshkian, parliament under Mohammad Bagher Ghalibaf, the Foreign Ministry and the Supreme National Security Council — alongside the still influential Islamic Revolutionary Guard Corps and security apparatuses.

This does not mean that Pezeshkian and Ghalibaf controlled Iranian foreign policy. The Revolutionary Guards and security apparatuses continue to wield decisive influence. But as long as the new leadership had not yet fully consolidated its power, no single centre of power possessed the weight and ultimate decision-making authority that Ali Khamenei had built up over decades.

It was precisely this that gave the more dialogue-oriented forces greater room for manoeuvre. The rapprochement between Iran and the United States was a clear example. According to reports, Mohammad Bagher Zolghadr, then secretary of the Supreme National Security Council, was among those officials who supported an understanding with the United States. This suggests that, even within the power structure of the Islamic Republic, a consensus in favour of negotiations was possible at that point.

But this consensus was fragile. Zolghadr's resignation and his replacement by Mohsen Rezaei, the former commander of the Revolutionary Guards, are signs of a shift in the balance of power. Officially, Zolghadr's departure was described as a resignation. He was subsequently appointed as the Supreme Leader's political adviser. A direct link between his departure and his position on the agreement with the United States is therefore not established.

The longer the new power structure takes to consolidate, the higher the political cost of compromise will become.

Nevertheless, the timing of the change, amid the controversies surrounding the understanding with Washington, is noteworthy. What matters is less the personnel change itself than the broader trend it reflects: the security forces are gaining greater weight within the new power structure. For Europe, the problem is not only that Tehran may adopt a tougher stance in the future. More importantly, the constellation of power that made negotiations possible in the first place is itself changing.

If Mojtaba Khamenei consolidates his power primarily with the support of the Revolutionary Guards and security apparatuses, their influence over Iranian foreign policy will grow further. That does not mean negotiations will become impossible. The Islamic Republic remains under massive economic pressure and is bearing the high costs of the war. It therefore still has an interest in reaching an agreement.

But the need for negotiations does not amount to a willingness to compromise. If economic and security pressure continues without a tangible result, it would instead strengthen those forces arguing that the United States only understands the language of strength and that every concession will lead to further demands. Time alone, therefore, does not inevitably lead to war or escalation. But the longer the new power structure takes to consolidate, the higher the political cost of compromise will become.

The decisive question, therefore, is not so much which foreign policy

course the new leadership prefers today, but rather how the balance of domestic forces is changing. The more the new power structure consolidates, and the more weight the security apparatuses gain in the process, the harder it will become for dialogue-oriented actors to push through concessions to Washington domestically. The diplomatic window is therefore not necessarily closing because Tehran fundamentally rejects negotiations, but because the political cost of compromise is rising.

Europe can't wait any longer

For Europe, the implication is clear: it should not wait until the new power structure in Tehran has fully consolidated before acting diplomatically. The European Union should, precisely now, during this transitional phase, maintain and expand its channels of communication with the Pezeshkian government, parliament and other influential centres of decision-making.

This should not be limited to a short-term agreement on de-escalation. Europe should seek to create a framework in which Iran's economic and security interests can be linked to a more predictable relationship with the West. Alongside political channels, this requires concrete incentives that demonstrate to those in Tehran willing to negotiate that compromise can bring political and economic benefits.

This does not mean turning a blind eye to Iran's missile programme, Tehran's regional policies or other security concerns. On the contrary: diplomacy becomes all the more important when differences grow wider. The current opportunity is the product of a transitional situation: the new leadership has not yet fully consolidated its power, several centres of power continue to compete for influence and at least part of the political elite still sees negotiations as a possible way out of the crisis.

But this situation will not last. Every month that passes without tangible diplomatic progress favours the consolidation of a power structure in which compromise carries a higher political cost and security actors gain greater weight in decision-making.

Europe can still influence this process. But those who wait until the new order in Tehran has fully taken shape may find that there is no open window left.

Right now, the window is still open.

But it is closing.



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