TAL SHIAR DEFENSE INTELLIGENCE REPORT

UNCLASSIFIED//AOR CENTCOM, Iran

IRGC to Withstand President Trump's Military Escalation

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Following escalation from Iran in the past days, President Trump will likely authorize a series of escalation options, primarily utilizing expanded airstrikes. This escalation will be constrained by munitions stockpiles, force-protection requirements, and the IRGC's demonstrated high pain tolerance. After a 13-night air campaign and a subsequent pause, the core judgment is that the IRGC and the post-Khamenei leadership will not cave. Regime survival and continued leverage over the Strait of Hormuz constitute their definition of success. Further U.S. kinetic pressure is likely to produce calibrated asymmetric retaliation rather than strategic capitulation. The baseline IRGC posture is calibrated asymmetric retaliation, continued shipping interdiction, and protracted attrition. As before, a ceasefire will likely be agreed but will not lead to a peace deal.

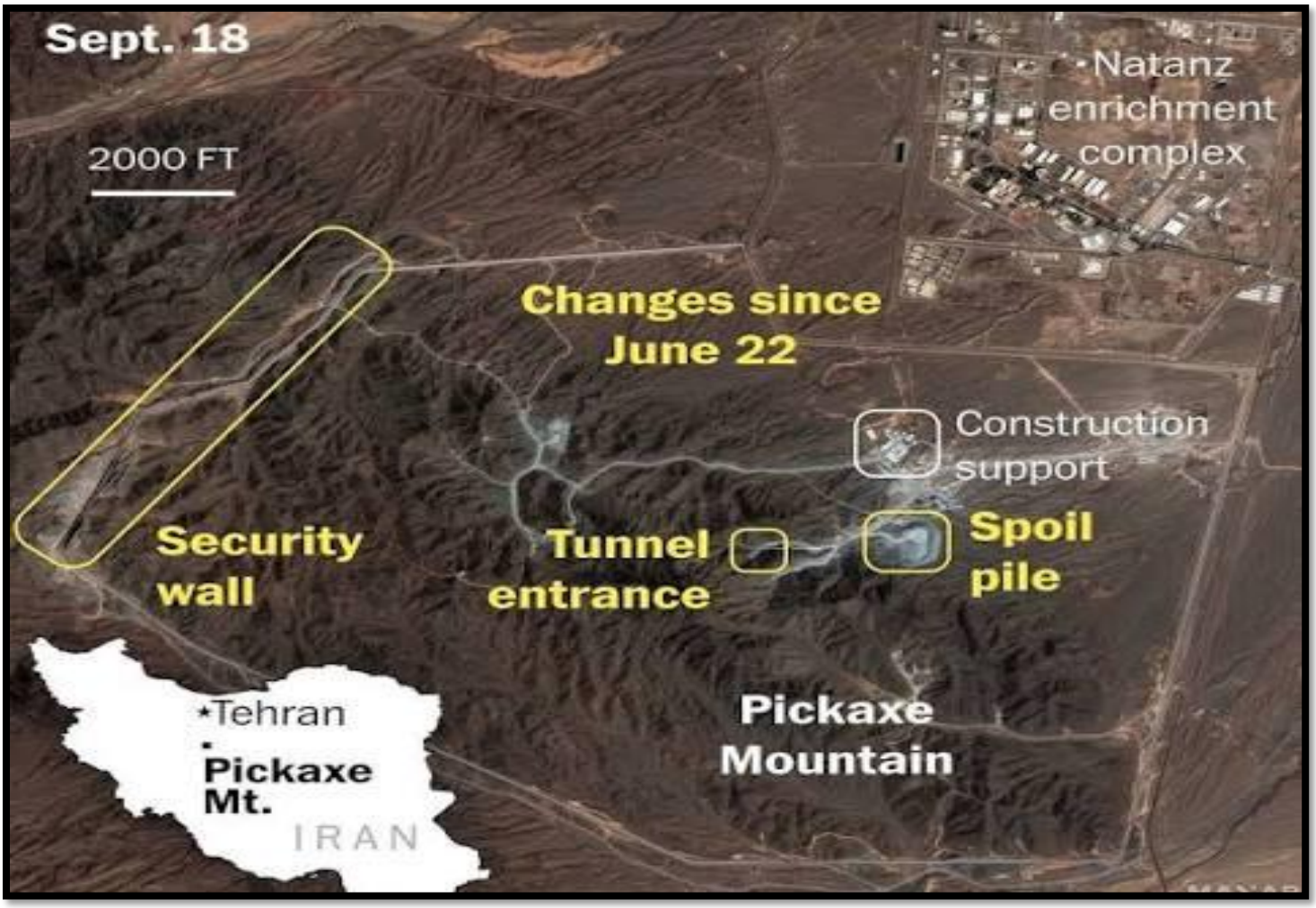
- **Current decision window:** The June MOU collapsed in early July over Iranian demands to regulate and monetize Hormuz traffic. Reciprocal strikes followed, ending in a 13-night U.S. campaign. By 25–28 July the White House paused major escalation after Gen. Dan Caine and advisors highlighted rapid depletion of Patriot interceptors needed to defend U.S. and partner forces. Trump has publicly discussed a "massive attack," Pickaxe Mountain, energy/infrastructure targets, and limited ground options while keeping diplomacy open.



- **IRGC non-capitulation posture:** The IRGC and reconstituted leadership treat survival plus Strats of Hormuz control as victory. Air campaigns to date have not produced political collapse or abandonment of core red lines. Iranian statements emphasize "crushing response" and escalation reciprocity. Russian satellite imagery support continues to improve Iranian targeting of fixed U.S. sites.

- **Leverage balance:** Iran retains escalation advantages in a prolonged low-intensity contest by threatening shipping and regional bases at lower cost than the United States incurs to defend

them. U.S. munitions burn rates and political constraints on ground forces limit the credibility of maximalist threats. The pause itself signals the limits of pure air power against a determined adversary.



Pickaxe MT likely target if President Trump escalates.

Escalation Options and Projected IRGC Responses

Four primary options remain under consideration. None is assessed to produce rapid Iranian capitulation. The IRGC's most probable response across the option set is continued asymmetric strikes on U.S. and partner bases, shipping harassment, and selective proxy activation, calibrated to impose cumulative costs while avoiding actions that would justify a U.S. ground campaign.

- **Expanded stand-off air campaign (highest readiness):** Intensify strikes on coastal radars, anti-ship batteries, energy infrastructure, selected bridges/power plants, and the hardened Pickaxe Mountain complex (assessed >80–100 m deep). Lowest near-term U.S. casualty risk but accelerates munitions consumption and invites further Iranian retaliation against shipping and bases. According to Pentagon/White House statements, ISIS nuclear assessments, and Axios (July 2026).

- **Limited ground or SOF actions:** Seizure of Kharg Island or contested Strait islands, or special-operations insertion against deeply buried nuclear-related sites. Offers more decisive physical effects and signaling but introduces higher risk of U.S. casualties and Iranian domestic mobilization. Trump has referenced "other people" potentially conducting ground elements. Per Wall Street Journal, CNN, and administration comments (July 2026).

- **Economic/naval intensification or managed attrition:** Reinforce the naval blockade and secondary pressure, or accept a lower-intensity contest while seeking a revised diplomatic understanding. Slower-acting and politically less costly near-term, yet leaves core free-navigation objectives unmet and risks perception of strategic stalemate. The IRGC is assessed as able to sustain this contest longer than many prefer. According to Soufan Center, Carnegie, and market analyses (July 2026).

Conclusion

The IRGC will not cave under currently available escalation options. High pain tolerance, Hormuz leverage, Russian ISR support, and the ability to impose costs on U.S. forces and regional partners at relatively low internal political cost make protracted attrition the most likely trajectory. Near-term, the pause is assessed to hold or yield only limited, carefully calibrated strikes. Medium-term, a negotiated freeze restoring commercial transit while leaving residual Iranian influence remains the most plausible off-ramp if both sides prioritize cost avoidance. Assessment confidence is high on non-capitulation and moderate on the precise option the President will ultimately select.



Tal Shiar was founded by Nadeem Iqbal, a national security expert who served over 16 years as an intelligence officer for the Department of Defense from 2006-2022. His career began as a counter-insurgency analyst on the Afghanistan-Pakistan Task Force (2006–2013), followed by 9 years as a military analyst in the Syria Branch (2013–2022). He deployed five times in support of combat operations (3× Afghanistan, 2× Iraq), including two rotations with Special Operations Forces focused on counter-terrorism missions in the CENTCOM theater. Additional roles included rotations to CIA Headquarters as the military analyst for the DNI Middle East Task Force and served as the Syria Country Director for Office of Secretary of Defense Policy (OSDP). He was recognized with Joint Civilian Commendation/Achievement Medals, the NATO Medal(x3), the Secretary of Defense GWOT Medal, DoD Expeditionary Award and the OSD Excellence Award.